



Wisconsin Public School District

GENERAL RECORDS SCHEDULE

Crosswalk

Revised October 2023

Wisconsin Department of Public Instruction

Introduction

In March 2023, the Public Records Board approved a new Wisconsin Public School District General Records Schedule (the 2023 GRS). The 2023 GRS governs the records retention obligations of school districts under Wis. Stat. § 16.61, and applies to “public records” as defined in Wis. Stat. § 16.61(2)(b). The 2023 GRS replaces the prior version of the Wisconsin Records Retention Schedule for School Districts, previously adopted in 2010 (the 2010 GRS).

The transition to the 2023 GRS is significant. The 2023 GRS now only includes records that are unique to school districts. The PRB directed that retention schedules from the 2010 GRS that include non-school district specific records should be superseded by other state and local retention schedules approved and made available by the PRB.

This crosswalk attempts to identify the state and local retention schedules that most closely align with superseded 2010 GRS retention schedules in order to aid school districts in transitioning to use of the retention schedules approved and made available by the PRB. The crosswalk represents the DPI's opinion only. It is not prescriptive, does not represent the opinion of the PRB, and should not be considered legal advice.

This crosswalk displays each superseded 2010 GRS retention schedule. Each superseded 2010 GRS retention schedule crosswalks to a PRB approved retention schedule, and identifies its location within other state and local general records schedules. Because the 2010 GRS did not include record series descriptions, some crosswalks include more than one retention schedule, and the crosswalk may reference a retention schedule that does not accurately describe a given record. School districts should consult with legal counsel when applying retention schedules to specific documents.

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# Locating Retention Schedules

The prefix of an RDA number assigned to a record series correlates with the General Records Schedule to use to locate the retention schedule for additional details. Use the chart below to assist in this process.

## Public Records Board General Retention Schedules

**State General Records Schedules** <https://publicrecordsboard.wi.gov/Pages/GRS/Statewide.aspx>

* Administrative Records ADMIN
* Budget Records BUD
* Facilities Records FAC
* Fiscal and Accounting Records FIS
* Human Resources Records HR
* Information Technology Records IT
* Payroll and Benefits Records PAY
* Purchasing and Procurement Records PUR
* Risk Management Records RISK

**Local General Records Schedules** https://publicrecordsboard.wi.gov/Pages/GRS/LocalUnit.aspx

* Municipal Records N/A\*
* School District Records PUBSC

# ADMINISTRATIVE RECORDS – SCHOOL BOARD RECORDS

| 1.1.0 | Expired School Districts GRS (2010) School Board Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule\* |
| --- | --- | --- | --- | --- |
| 1.1.1 | School Board Meeting Minutes and Agenda Packets \*\*\* | Permanent | Public School District GRS | PUBSC100 School Board and School Board Committee Meeting Materials - Open Session, Permanent; PUBSC120 School Board and School Board Committee Meeting Materials - Closed Session, Permanent |
| 1.1.2 | School Board Committee Meeting Minutes | Permanent | Public School District GRS | PUBSC100 School Board and School Board Committee Meeting Materials - Open Session, Permanent; PUBSC120 School Board and School Board Committee Meeting Materials - Closed Session, Permanent |
| 1.1.3 | Citizens Advisory Committee Meeting Minutes | 3 years | Administrative Records GRS | ADMIN402 Project Records, EVT + 5 years and destroy / Event is date of project completion; ADMIN403 Project Records - Historically Significant, EVT + 5 years and transfer to Wisconsin Historical Society / Event is date of project completion |
| 1.1.4 | Management Team Meeting Minutes | 3 years | Administrative Records GRS | ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated |
| 1.1.5 | Reports to the School Board | 3 years | Administrative Records GRS | ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated |
| 1.1.6 | School Board Policies and Procedures | Until superseded | Municipal Records GRS | Internal Policies and Procedures, EVT + 7 years and destroy / Event is date the policy/procedure is superseded or made obsolete |
| 1.1.7 | School Board Correspondence | 3 years | Administrative Records GRS | ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated |
| 1.1.8 | Management Guidelines | Until superseded | Administrative Records GRS | ADMIN400 Policies and Procedures, EVT + 7 years and destroy / Event is date policy or procedure is superseded or obsolete |
| 1.1.9 | Legal Opinions | 7 years | Municipal Records GRS | Attorney Opinions, Permanent |
| 1.1.10 | Notice of Meetings | 7 years | Administrative Records GRS | ADMIN303 Legal Notices, CR + 1 year and destroy / Event is date of creation |
| 1.1.11 | Petitions | 7 years | Municipal Records GRS | Petitions, EVT + 7 years and destroy / Event is date petition is approved or denied |
| 1.1.12 | Referendum Results | Permanent | Public School District GRS | PUBSC160 Referendum Results, Permanent |
| 1.1.13 | Complaints to the School Board | 3 years | Administrative Records GRS | ADMIN353 External Complaints, EVT + 2 years and destroy confidential / Event is date of complaint resolution, dismissal or end of litigation |
| 1.1.14 | Newsletters/Bulletins | 1 year | Administrative Records GRS | ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated |
| 1.1.15 | Special Project Studies/Reports/Strategic Plans/Task Force Reports | 3 years | Administrative Records GRS | ADMIN250 Organizational Planning Documentation, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date plan is completed or superseded; ADMIN402 Project Records, EVT + 5 years and destroy / Event is date of project completion; ADMIN403 Project Records - Historically Significant, EVT + 5 years and transfer to the Wisconsin Historical Society / Event is date of project completion |
| 1.1.16 | Management Correspondence/Memos | 1 year [[1]](#footnote-1) | Administrative Records GRS | ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated;ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated |
| 1.1.17 | Election Notices | 2 years following the elections | Municipal Records GRS | Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election |
| 1.1.18 | Election Petitions | 2 years following the elections | Municipal Records GRS | Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election |
| 1.1.17 | Election Notices | 2 years following the elections | Municipal Records GRS | Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election |
| 1.1.18 | Election Petitions | 2 years following the elections | Municipal Records GRS | Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election |
| 1.1.20 | Election Tally | 2 years following the elections | Municipal Records GRS | Official Canvassers Statements, EVT + 10 years and destroy / Event is date of the election |
| 1.1.21 | Election Tally Books and Returns | 2 years following the elections | Municipal Records GRS | Official Canvassers Statements, EVT + 10 years and destroy / Event is date of the election |
| 1.1.22 | Election Canvassing | 10 years following elections | Municipal Records GRS | Official Canvassers Statements, EVT + 10 years and destroy / Event is date of the election |
| 1.1.23 | Election Registrations | 2 years following voter registration | Municipal Records GRS | Election Voting and Registration Statistics Reports, Event + 22 months and destroy / Event is date of the election |

# **ADMINISTRATIVE RECORDS – BUILDING AND GROUNDS RECORDS**

| 1.2.0 | Expired School Districts GRS (2010) Building and Grounds Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule\* |
| --- | --- | --- | --- | --- |
| 1.2.1 | School District boundaries (and Plats) (including acknowledgments of changes) | Permanent | Public School District GRS | PUBSC180 School District Boundary Acknowledgements, Permanent |
| 1.2.2 | Architecture Building Blueprints | Life of building | Facilities Records GRS | FAC00015 As-Built Plans and Original Building Drawings for Completed Construction Projects, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date of termination of ownership |
| 1.2.3 | Building and Site Data Books | Permanent | Facilities Records GRS | FAC00016 Land Titles, Conveyances, Easements, and Use Restrictions, Permanent |
| 1.2.4 | Tools and Equipment Inventory | Retain until superseded | Fiscal and Accounting Records GRS | FIS00050 Inventories - Capital Equipment, Supplies, Commodities and Parts, FIS + 4 years and destroy / Event is end of fiscal year |
| 1.2.5 | Specification | Life of building | Facilities Records GRS | FAC00015 As-Built Plans and Original Building Drawings for Completed Construction Projects, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date of termination of ownership |
| 1.2.6 | Building Permits | 6 years after acceptance | Facilities Records GRS | FAC00011 Construction Project File; FAC00012 Construction Project File - Historically Significant Facilities |
| 1.2.7 | Electrical Information | Life of building | Facilities Records GRS | FAC00015 As-Built Plans and Original Building Drawings for Completed Construction Projects, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date of termination of ownership |
| 1.2.8 | Maintenance Requests | 1 year | Facilities Records GRS | FAC00051 Facility and Building Maintenance, CR + 3 years and destroy confidential / Event is date of creation |
| 1.2.9 | Abstract/Deeds/Title Papers/Mortgages | Permanent | Facilities Records GRS | FAC00016 Land Titles, Conveyances, Easements, and Use Restrictions, Permanent |
| 1.2.10 | Chemical Wastes Manifest (including asbestos and radon checks) | Permanent | Facilities Records GRS | FAC00013 Asbestos and Hazardous Material and Environmental Remediation Case File, Permanent |

#  **ADMINISTRATIVE RECORDS – TRANSPORTATION RECORDS**

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| --- | --- | --- | --- | --- |
| 1.3.0 | Expired School Districts GRS (2010) Transportation Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule\* |
| 1.3.1 | Parent or Other School District Transportation Contracts | 6 years | Public School District GRS | PUBSC220 Parent or Other School District Transportation Contracts, EVT + 1 year and destroy confidential / Event is date of the end of the school year |
| 1.3.2 | Bus Transportation Contract | 4 years after expiration | Purchasing and Procurement Records GRS | PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal |
| 1.3.3 | Field Trip Permission Request | 1 year | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 1.3.4 | Financial Statement for Out-of-District Field Trips | 1 year | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 1.3.5 | Bus Rules/Policy | Until superseded | Municipal Records GRS | Internal Policies and Procedures, EVT + 7 years and destroy / Event is date the policy/procedure is superseded or made obsolete |
| 1.3.6 | Bus Route Listing | 4 years | Public School District GRS | PUBSC240 Transportation Aid Records, EVT + 4 years and destroy confidential / Event is date of the end of school year |
| 1.3.7 | School Bus Accident Report | 7 years | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 1.3.8 | Pupil Transportation Report | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |

# **ADMINISTRATIVE RECORDS – STATISTICAL RECORDS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1.4.0 | Expired School Districts GRS (2010)Statistical Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule\* |
| 1.4.1 | Wisconsin School Directory update (PI-1280) & Verification of Private Schools Within Public District (PI-1201) | 1 year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 1.4.2 | Pupil Nondiscrimination and Educational Equity Report (PI-1197B) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 1.4.3 | Fall Staff Reports (PI-1202) | 3 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 1.4.4 | School District Statistical Report (PI-1203) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |

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# ADMINISTRATIVE RECORDS – PROGRAM APPLICATIONS/EVALUATIONS

| 1.5.0 | Expired School Districts GRS (2010) Program Applications/Evaluations | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule\* |
| --- | --- | --- | --- | --- |
| 1.5.1 | ESEA Consolidated Application (PI-9550) | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.2 | ESEA Affirmation of Consultation with Private School Officials (PI-9550-AC) | 7 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.3 | ESEA NCLB Assurances (PI-9550-Assurances) | 7 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.4 | Title I Paraprofessional Compliance School Report Summary (PI-9550-II-BB) | 7 years |  | Closed |
| 1.5.5 | Application – Alcohol/Traffic Safety Chapter 20 | 5 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 1.5.6 | Carl Perkins Basic Grant Application (PI-1303) | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.7 | VEERS Composite Enrollment Report (PI-1330-R) | 5 years |  | Closed |
| 1.5.8 | Vocational Student Concentrator Completer Graduate Follow-up Survey (PI-1335-VEERS) | 5 years |  | Closed |
| 1.5.9 | Summer School Program Report – ITP Summary (PI-1805) | 5 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 1.5.10 | Title I Part C – Education of Migratory Children Local Project Application – Summer (PI-1730) | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.11 | Title I Comparability Report (PI-1753) | 7 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.12 | Grant Application: Alcohol and Other Drug Abuse Grant (PI-1816) | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.13 | State AODA Grants Renewal Form (PI-1813) | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.14 | State AODA Grants End of Year Report | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 1.5.15 | Annual Report for Children at Risk Program (PI-2375) (when identified) | 5 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |

FINANCE RECORDS - PURCHASING/PAYROLL RECORDS

| 2.1.0 | Expired School Districts GRS (2010)Purchasing/Payroll Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 2.1.1 | Purchase Requisition | 1 year | Purchasing and Procurement Records GRS | PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal |
| 2.1.2 | Purchase Orders | 3 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.1.3 | Bids & Contracts | 3 years | Purchasing and Procurement Records GRS | PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal |
| 2.1.4 | Performance Guarantee/Warrant of Vendor | Until expiration of the warranty | Purchasing and Procurement Records GRS | PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal |
| 2.1.5 | Vacation/Personal Leave Records | 3 years from time of record creation | Payroll Records GRS | PAY00005 Leave Accounting Records, EVT + 15 years and destroy confidential / Event is last date of pay period; PAY00012 Payroll and Benefits Reports, EVT + 5 years and destroy confidential / Event is date report is generated |
| 2.1.6 | W-2 Forms | 7 years | Payroll Records GRS | PAY00016 Master Pay Period Record, EVT + 15 years and destroy confidential / Event is end of calendar year |
| 2.1.7 | W-4 Forms | 4 years | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
| 2.1.8 | Social Security Report | 7 years after retirement | Payroll Records GRS | FIS00026 Tax Records, FIS + 6 years and destroy confidential / Event is end of fiscal year |
| 2.1.9 | Retirement Reports | 7 years after retirement | Payroll Records GRS | PAY00012 Payroll and Benefits Reports, EVT + 5 years and destroy confidential / Event is date report is generated |
| 2.1.10 | Enrollment Cards | Maintain 7 years after retirement, resignation or termination | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
| 2.1.11 | Disability Insurance | Maintain 7 years after retirement, resignation or termination | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
|  | Complaints to the School Board | 3 years | Administrative Records GRS | ADMIN353 External Complaints, EVT + 2 years and destroy confidential / Event is date of complaint resolution, dismissal or end of litigation |
| 2.1.12 | Life Insurance | Maintain 7 years after retirement, resignation or termination | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
| 2.1.13 | Health/Dental Insurance | Maintain 7 years after retirement, resignation or termination. | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
| 2.1.14 | Tax Sheltered Annuity | Maintain 7 years after retirement | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
| 2.1.15 | United Way Contributions | 1 year | Payroll Records GRS | PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period |
| 2.1.16 | Union Dues | Current year | Payroll Records GRS | PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period |
| 2.1.17 | Payroll Distribution Report | 4 years | Payroll Records GRS | PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period |
| 2.1.18 | Payroll Deduction Report | 4 years | Payroll Records GRS | PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period |
| 2.1.19 | Additional Pay Authorization Forms | 4 years | Payroll Records GRS | PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period |
| 2.1.20 | Insurance Reports and Bills | 7 years after date of retirement, resignation or termination. | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.1.21 | Absence Report/Time Sheets | 7 years after date of retirement, resignation or termination | Payroll Records GRS | PAY00016 Master Pay Period Record, EVT + 15 years and destroy confidential / Event is end of calendar year |
| 2.1.22 | State and Federal Tax Reports | 4 years | Payroll Records GRS | PAY00016 Master Pay Period Record, EVT + 15 years and destroy confidential / Event is end of calendar year |
| 2.1.23 | Stop Payments | 4 years | Fiscal and Accounting Records GRS | FIS00029 Forgery and Stop Payment Records, EVT + 6 years and destroy confidential / Event is date, batched by month, which the stop payment was executed |
| 2.1.24 | Cancelled Payroll Checks | 4 years | Fiscal and Accounting Records GRS | FIS00027 Paid/Canceled Checks, EVT + 7 years and destroy confidential / Event is month paid |

FINANCE RECORDS - ACCOUNTING/BUDGET RECORDS

| 2.2.0 | Expired School Districts GRS (2010)Accounting/Budget Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 2.2.1 | Budget Report (PI-1504) | Permanent | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.2 | Annual Report (PI-1505) | Permanent | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.3 | Annual Report Calendar (PI-1505 Calendar) | 1 year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.4 | Annual Report (Aid Certification Data) (PI‑1505-AC) | Permanent | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.5 | Special Education Fiscal Report–Annual (PI‑1505-SE) | Permanent | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.6 | Special Education Fiscal Report Budget (PI‑1505-SE Budget) | 1 year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.7 | Audited Annual Report (Aid Certification Data) (PI‑1506-AC) | 1 year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.8 | Financial Audit Statement (PI-1506) | Permanent | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.9 | Regular Tuition Reports (PI-1514) | Permanent |   | Closed |
| 2.2.10 | Summer School (PI-1804) | 1 year after audit | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.11 | Annual Budget Report (DPI) | Permanent | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.12 | Annual Audit Reports | Permanent | Fiscal and Accounting Records GRS | FIS00001 Audit Reports, Agency Responses and Audit Finding Resolutions, EVT + 3 years and destroy / Event is the date of issuance of final report |
| 2.2.13 | Disbursement and Receipt Journal | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.14 | General Ledger – All Funds | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.15 | Fund Ledger Cards | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.16 | Canceled General Voucher Checks | 7 years | Fiscal and Accounting Records GRS | FIS00027 Paid/Canceled Checks, EVT + 7 years and destroy confidential / Event is month paid |
| 2.2.17 | Monthly Bank Statements | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.18 | Monthly Reconciliation Ledger | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.19 | Bank Deposit Receipts | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.20 | District Equalization Valuation Report | 7 years |   | Closed |
| 2.2.21 | State Aid Computation Cards (PI-1519) | 7 years |   | Closed |
| 2.2.22 | Tax Levy Certification (PI-401) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.23 | State Aid Payment Vouchers (PI-1518) | 7 years |   | Closed |
| 2.2.24 | Pupil Transportation (PI-1547) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.25 | Common School Fund Voucher | 7 years |   | Closed |
| 2.2.26 | State Superintendent Acknowledgment of District Boundary Changes | 7 years |   | Closed |
| 2.2.27 | Outstanding Long-Term Indebtedness Statements/Notification | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.27.1 | Long-Term Bonds | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.27.2 | Long-Term Notes | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.27.3 | Short-Term Notes | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.27.4 | Approved State Trust Fund Application | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.22.5 | Land Contracts | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.27.6 | Certificate of Bond Sale | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.27.7 | Schedule of Bond Retirements | Permanent | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.28 | Canceled Bonds of Indebtedness and Interest | 7 years | Public School District GRS | PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared |
| 2.2.29 | Invoices | 7 years | Fiscal and Accounting Records GRS | FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year |
| 2.2.30 | Short-Term Contracts for Contest Officials (e.g., spelling bee, Academic Decathlon, etc.) | 3 years | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 2.2.31 | Short-Term Contracts for Athletic Officials (seasonal referee, etc.) | 3 years | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 2.2.32 | Insurance Policies | 7 years | Risk Management GRS | RISK0025 Property Insurance Policies (General & Excess), EVT + 30 years and destroy, Event is date of policy |
| 2.2.33 | Damage and Loss Reports | 7 years | Risk Management GRS | RISK0026 Property Claim Files, EVT + 5 years and destroy confidential / Event is date claim is closed |

FINANCE RECORDS – FOOD SERVICES RECORDS

| 2.2.34.0 | Expired School DistrictsGRS (2010)Food Services Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 2.2.34.1 | Application/Agreement/Policy Statements for Food and Nutrition Programs | 5 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.34.2 | Applications for Free and Reduced Price Meals | 5 years | Public School District GRS | PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year |
| 2.2.34.3 | Joint Agreement/Vendor – Management Company Verification Summary/Documentation | Current fiscal year plus 4 years | Public School District GRS | PUBSC640 Federal Food Service Program Procurement Contract and Agreement Records, EVT + 3 years and destroy / Event is date contract expires or final payment is recorded, whichever occurs first |
| 2.2.34.4 | Daily Participation Record (by building) | Current fiscal year plus 4 years | Public School District GRS | PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year |
| 2.2.34.5 | Daily Participation Record (by district) | Current fiscal year plus 4 years | Public School District GRS | PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year |
| 2.2.34.6 | Menus/Production Record (lunch and breakfast) | Current fiscal year plus 4 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.34.7 | Claim Worksheet for NSL,SB, SMP,WMMP, EEN (PI-1409) | Current fiscal year plus 4 years | Public School District GRS | PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year |
| 2.2.34.8 | Donated Food Distribution Program Monthly Inventory Records | Current fiscal year plus 4 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.34.9 | A la Carte, Lunch Breakfast, ½ -Day Kindergarten | Current fiscal year plus 4 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.34.10 | Milk Program Sales Records | Current fiscal year plus 4 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.35 | Grant Applications – Successful ++ | 5 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 2.2.36 | Grant Applications – Unsuccessful | 1 year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 2.2.37 | State Tuition Claim (PI-1524) | 1 year after audit | Public School District GRS | PUBSC680 State Tuition Claim Documentation, EVT + 1 year and destroy / Event is date of final audit of claims |
| 2.2.38 | Tuition Claim for non-Residents | 1 year after audit | Public School District GRS | PUBSC680 State Tuition Claim Documentation, EVT + 1 year and destroy / Event is date of final audit of claims |
| 2.2.39 | Summer School (PI-1804) (Electronic) | 1 year after audit | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.40 | Notification to Exceed Revenue Limits (PI-1572-B) | Permanent |  | Closed |
| 2.2.41 | Group and Foster Home FTE Log (PI-1589) | 5 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 2.2.42 | Mentoring Grant for Initial Educators (PI-1640) | 7 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 2.2.43 | Peer Review and Mentoring Grants (PI-1653) | 7 years | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 2.2.44 | District Development Levels Aligned to Grades in PI 34.27.29 (PI-1675) | Permanent |  | Closed  |
| 2.2.45 | National School Lunch PROV 2 Contract | 4 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.46 | School Food Authority-Civil Rights Compliance Self Evaluation Form—National School Lunch (PI-1441) | 4 years | Public School District GRS | PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year |
| 2.2.47 | USDA Commodity Distribution Program Complaint Form (PI-6005) | Filed only when complaint has been received. Keep records for 4 years beyond that. | Public School District GRS | PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year |

PERSONNEL RECORDS – EMPLOYEE RECORDS

| 3.1.0 | Expired School Districts GRS (2010) Employee Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule |
| --- | --- | --- | --- | --- |
| 3.1.1 | Teaching Certificates (Including permits and certifications) | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.2 | Transcript of College Credit | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.3 | Certified Staff Certificates of Previous Experience | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s) |
| 3.1.4 | Evaluation Records | 6 years after date of retirement, resignation, or termination | Human Resources Records GRS | HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s) |
| 3.1.5 | Individual Teaching Contracts | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.6 | Other Individual Employment Contracts | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.7 | Applications (Hired) | 6 years after date of retirement, resignation, or termination | Human Resources Records GRS | HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s) |
| 3.1.8 | Applications (Not Hired) | 3 years | Human Resources Records GRS | HR000025 Non-Select Letters or Emails, EVT + 1 year and destroy confidential / Event is end of recruitment |
| 3.1.9 | Immigration and Nationalization Services INS-9 Forms | 3 years from date of hire, or one year after termination, whichever is later | Human Resources Records GRS | HR000026 Federal I-9 Forms, EVT + 3 years after date of hire or 1 year after termination, whichever is longer, per USCIS 13248, and destroy confidential / Event is date of hire or date of termination |
| 3.1.10 | Staff Accident Reports | 5 years after settlement | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.10.1 | Injury Claims | 5 years after settlement | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.10.2 | Workers Compensation | 5 years after settlement | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.10.3 | Public Liability | 5 years after settlement | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.10.4 | Settlements | 7 years after settlement | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.11 | Medical Records | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records |
| 3.1.11.1 | Physical Examinations | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records |
| 3.1.11.2 | TB Tests | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records |
| 3.1.12 | Health & Dental Insurance Waivers | 3 years after date of retirement, resignation, or termination | Payroll Records GRS | PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service |
| 3.1.13 | Affirmative Action Files | 7 years | Human Resources Records GRS | HR000135 Compliance Reviews of State Agency Affirmative Action (AA) Plans, EVT + 3 years and destroy confidential / Event is date of final report |
| 3.1.14 | Arbitration Decisions – Negotiator | 7 years | Human Resources Records GRS | HR000109 Arbitration Decisions – Presential, Permanent |
| 3.1.15 | Athletic Activity Contracts | 6 years after date of retirement, resignation, or termination. | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.16 | Classification Studies – Description of job duties of individual school district positions. | 6 years from creation | Human Resources Records GRS | HR000047 Classification Surveys and Related Documentation, EVT + 6 years and destroy / Event is close of survey or action taken |
| 3.1.17 | Disability Insurance Claims – Claims filed by employees for disability insurance program. | 6 years after final settlement of claim | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.18 | Eligibility Register – List of job applicants who have qualified for positions within district. | 3 years after job has been filled | Human Resources Records GRS | HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s) |
| 3.1.19 | Employee Deficiency/Termination Reports | 6 years after retirement, resignation, or termination | Human Resources Records GRS | HR000112 Employee Discipline Related Records; HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.20 | Equal Employment Opportunity Reports/Summary Data Reports sent to Federal Government | 3 years | Human Resources Records GRS | HR000047 Classification Surveys and Related Documentation, EVT + 6 years and destroy / Event is close of survey or action taken |
| 3.1.21 | Fair Labor Standards Act – Salary schedules, employee classification, compensation periods, work schedules/periods | 6 years after retirement, resignation, or termination. | Human Resources Records GRS | HR000051 Fair Labor Standards Act 9FLSA) Status Requests, EVT + 3 years and destroy confidential / Event is date of termination |
| 3.1.22 | Grievance Files – Employee grievances and/or complaints filed under a labor agreement or personnel rules. This also relates to arbitration files and related court cases. | 10 years after date of settlement. | Human Resources Records GRS | HR000050 Fair Labor Act (FLSA) Formal and Informal Complaint Files, EVT + 5 years and destroy confidential / Event is date of determination; HR00011 Agency Grievance Case File, EVT + 4 years and destroy / Event is date request is approved or denied |
| 3.1.23 | Insurance Certificates and Policies | 6 years after expiration | Risk Management GRS | RISK0002 Proposals for Insurance Coverage, EVT + 7 years and destroy / Event is date bid is closed |
| 3.1.24 | Insurance Premium Reports | 6 years from date of creation | Risk Management GRS | RISK0002 Proposals for Insurance Coverage, EVT + 7 years and destroy / Event is date bid is closed |
| 3.1.25 | Insurance Working Files | 6 years from date of creation | Risk Management GRS | RISK0002 Proposals for Insurance Coverage, EVT + 7 years and destroy / Event is date bid is closed |
| 3.1.26 | Labor Union – Contracts | Permanent | Human Resources Records GRS | HR000107 Signed Collective Bargaining Agreements, Permanent |
|  | Contracts between school district and various labor unions including: correspondence, salary schedules, personnel policies. |  | Human Resources Records GRS | HR000102 Bargaining Unit Master Agreements Case File, EVT + 10 years and transfer to Wisconsin Historical Society / Event is date signed labor agreement is enacted into law or date of labor agreement implementation, whichever is later |
| 3.1.27 | Labor Union – Disputes | Permanent | Human Resources Records GRS | HR000106 Union Member Grievance Arbitration Case Files, Permanent |
| 3.1.28 | Labor Union – Negotiations Minutes | Permanent | Human Resources Records GRS | HR000104 Agency Collective Bargaining and Collective Bargaining Agreement Administration Case File |
| 3.1.29 | Non-Union Salary Determination – Annual salary schedules for all non –union employees. | 6 years after expiration | Human Resources Records GRS | HR000202 Personnel History Roster, Permanent |
| 3.1.30 | OSHA – Employee Accident Reports | 3 years beyond date of accident | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |
| 3.1.31 | OSHA – Employee Exposure Records+++ Any information concerning employees exposed to toxic substances or harmful physical agents. | 30 years after termination, resignation, or retirement | Human Resources Records GRS | HR000151 Medical Records Involving Employee Exposure to Hazardous Substances, EVT + 30 years and destroy confidential / Event is termination of employment |
| 3.1.32 | OSHA – Employee Medical Records Any information concerning the health status of an employee which is made or maintained by a physician, nurse, or other health care personnel, or technician, including: medical and employment questionnaires or histories, medical exams, medical opinions, descriptions of treatments and prescriptions, and employee medical complaints. | 30 years after termination, resignation, or retirement | Human Resources Records GRS | HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records |
| 3.1.33 | Performance of Work Contracts | 6 years after action completed | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.34 | Personnel Files – Individual Containing applications, accident reports, citations, medical records (physical exam certificates, etc.). personal history, employee references, and letters of appointments/promotion, termination/resignation | 6 years after date of retirement, resignation, or termination | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.35 | Personnel files – Summer School Applications/contracts and miscellaneous correspondence for summer employment. | 6 years after date of retirement, resignation, or termination | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.36 | Personnel and Promotion List | 6 years or until superseded | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.37 | Position Recruitment File – Relating to posting, recruitment, selection, and appointment to each position. | 6 years after date of recruitment | Human Resources Records GRS | HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s) |
| 3.1.38 | Requisition for Personnel – Request for personnel to fill job vacancies. | Retain until 6 years after job is filled or the requisition is cancelled | Human Resources Records GRS | HR000011 Request to Staff Positions, EVT + 4 years and destroy / Event is date request is approved or denied |
| 3.1.39 | Substitute Teacher Reports | 3 years from date of hire | Human Resources Records GRS | HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service |
| 3.1.40 | Unemployment Claims/Compensation Claims for unemployment | 6 years after date of claim | Payroll Records GRS | PAY00025 Unemployment Compensation Records, EVT + 5 years and destroy confidential / Event is date of receipt or response |
|  | Claims for unemployment |  | Payroll Records GRS | PAY00025 Unemployment Compensation Records, EVT + 5 years and destroy confidential / Event is date of receipt or response |
| 3.1.41 | Summons/Pleadings, Other Legal Documents | 7 years | Human Resources Records GRS | HR000114 Personnel-Related Litigation Case Files, EVT + 5 years and destroy confidential / Event is date case is closed |
| 3.1.42 | Notices of Claims | 7 years | Risk Management GRS | RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed |

STUDENT RECORDS – STUDENT RECORDS

| 4.1.0 | Expired School Districts GRS (2010)Student Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 4.1.1 | Enrollment or Registration Forms | Date of Withdrawal plus 7 years. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.1.2 | Home Language Reports – Civil Rights Information | 1 year after student graduates or leaves school system, unless extended by consent. | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.3 | Listing of Disclosure and Transfer of Student Records | 5 years after student graduates or leaves school system. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.1.4 | Nonresident Pupil Attendance Application/Agreement | 5 years after student graduates or leaves school system. | Public School District GRS | PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later |
| 4.1.5 | Athletic Records—Team results, participation, contracts, transportation records, etc. | 5 years after student graduates or leaves school system. | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.1.6 | Accident Reports—Student Originating during school year and on school buildings or grounds. | 1 year after student graduates or leaves school system, unless extended by consent. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.1.7 | Application for Driver Education Certificates (PI-1715) | 1 year |   | Closed |
| 4.1.8 | Driver Education Program Application ( PI-1709) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.9 | Home Based Education Application (PI-1206) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.10 | January Pupil Membership Report (PI-1563) September Pupil Membership Report(PI-1563) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.11 | Pupil Count Youth Challenge Academy (PI-1563 YCA) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.12 | Pupil Nondiscrimination and Educational Equity Report (PI-1197-B) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.13 | Five-Year School Self-Evaluation Summary for Status of Pupil-Nondiscrimination (PI-1198) | 7 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 4.1.14 | Teacher Grade Books | 1 year after entry of grades in cumulative record. | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.1.15 | Teacher Attendance Records | 1 year after entry of grades in cumulative record. | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.1.16 | Lesson Plans | Until no longer of administrative value | Administrative Records GRS | ADMIN352 Transitory Records, EVT + 0 years and destroy confidential / Event is date created or received |

STUDENT RECORDS – PROGRESS RECORDS

| 4.2.0 | Expired School Districts GRS (2010) Progress Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 4.2.1 | Student Progress Records | 5 years after student graduates or leaves the school system | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.1 | Middle School Record | 5 years after student graduates or leaves the school system | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.2 | Scholastic School Record | 5 years after student graduates or leaves the school system | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.3 | Student Grades | 5 years after student graduates or leaves the school system | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.4 | Courses Taken | 5 years after student graduates or leaves the school system | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.5 | Attendance Record | 5 years after student graduates or leaves the school system | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.6 | Student’s School Extracurricular Activities | Permanent | Public School District GRS | PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.7 | Degrees/Awards | Permanent | Public School District GRS | PUBSC480 High School Transcripts and Degrees/Awards, Permanent |
| 4.2.1.8 | Report Cards | Permanent | Public School District GRS | PUBSC500 4K-8 Report Cards, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district |
| 4.2.1.9 | High School Transcripts | Permanent | Public School District GRS | PUBSC480 High School Transcripts and Degrees/Awards, Permanent |
| 4.2.2 | Achievement and Test Results Ability Profile—Report of the results of WKCE and other standardized state and national achievement, mental abilities, and aptitude tests reported by score, percentile rank, etc. | 1 year after recording of data in the academic achievement or cumulative record[[2]](#footnote-2).[[3]](#endnote-1)  | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |

STUDENT RECORDS – STUDENT HEALTH CARE RECORDS

| 4.3.0 | Expired School Districts GRS (2010)Student Health Care Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule\* |
| --- | --- | --- | --- | --- |
| 4.3.1 | 1. Student’s Health Care Records—Accurate complete and current data base; past health history, present health status, review of systems, health practices, developmental history and status, family structure, function, and health.
2. Health Care Provider Records (Patient Health Records)
 | 1 year after student graduates or leaves school system, unless extended by consent.[[4]](#footnote-3)  | Public School District GRS | PUBSC460 Patient Health Care Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.3.2 | **Emergency Cards**—Card or other form of record providing information on whom to contact in the event of an emergency, accident, or illness to a student | Until superseded or until student ceases enrollment, whichever sooner. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.3.3 | **Exclusion and Verification Documentation**—Affidavits or similar documents seeking the exclusion of students from participation in immunization or other health care programs for medical or religious reasons | If data from the verification docu­mentation is recorded on the cumu­lative health card, the documenta­tion need be retained only as long as administratively valuable. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.3.4 | **Reports to Enforcement Agencies**—copies of reports on child abuse or neglect, communicable disease, dog bites, drug offenses, missing children, or sexually transmitted disease submitted to the Wisconsin Department of Health and Family Services or local law enforcement and animal control agencies. | Retain for two (2) years following submission of report. | Public School District GRS | PUBSC280 Reporting to Enforcement Agencies, EVT + 5 years and destroy confidential / Event is date report is submitted |
| 4.3.5 | **Special Health Care Records**—Logs or reports of medications or treatment administered to students on a group or individual basis. | Current; If in support of Medicaid claim, 5-7 years. | Public School District GRS | PUBSC460 Patient Health Care Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.3.6 | **Parent’s Requests and Physician’s Authorization** for specialized health care. | End of validity of request or authorization plus 2 years. | Public School District GRS | PUBSC460 Patient Health Care Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.3.7 | **Family Educational Rights and Privacy Act** (FERPA) Access Policies | Until superseded |   | Closed |
| 4.3.8 | **FERPA Records of Access to Information** Record of each request to access to and each disclosure of personally identifiable information from the educational records of a student. Documentation of requests from and disclosure to the parent or eligible student, to an official of the district for what the district has determined are legitimate educational interests, to a party with written consent from the parent or eligible student, or to a party seeking directory data. Documentation of requests from and disclosures to any party not included in (a) above. | Retain for two (2) years Permanent retention (per regulation- 34 CFR 99.32(a)(2)) From the parent: Retention until the student is 18. | Public School District GRS | PUBSC300 Records of disclosure of pupil records, EVT + 0 and destroy confidential / Event is date underlying disclosed public record is no longer retained |

STUDENT RECORDS – STUDENT RECORDS

| 4.4.0 | Expired School Districts GRS (2010) Student Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 4.4.0 | **Protest of Record Statements**—Statements by parents or eligible students commenting on contested information in a student record, or stating why they disagree with a district’s decision not to amend a record, or both. | Retain for as long as the record containing the contested information is maintained. | Public School District GRS | PUBSC320 Protest of Record Statements, EVT + 0 years and destroy confidential / Event is date underlying contested public record is no longer retained |
| 4.4.1 | **Custody Documents—***It is an exception to the retention period given that a court order superseded by a subsequent order (e.g., a change in guardianship) need be retained only as long as administratively valuable.* | Until student is 18 years of age. | Public School District GRS | PUBSC380 Custody Documents, EVT + 1 and destroy confidential / Event is date student graduates or withdraws from district or date superseded by a subsequent order |
| 4.4.3 | Psychological Test Results, Central Office | 1 year after student graduates or leaves school system unless extended by consent. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.4.4 | Individual Student Disciplinary File | 1 year after student graduates or leaves school system unless extended by consent. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.4.5 | Student Expulsion Report | 1 year~~s~~ after student graduates or leaves school system unless extended by consent or expunged. | Public School District GRS | PUBSC410 Student Expulsion Order, EVT + 0 and destroy confidential / Event is date the order is no longer in effect |
| 4.4.6 | Student Suspension Report | 1 year after student graduates or leaves school system unless extended by consent. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 4.4.7 | Assault Against Staff Report | 1 year after student graduates or leaves school system unless extended by consent. | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |

STUDENT RECORDS – SPECIAL EDUCATION
INDIVIDUAL STUDENT RECORDS

**4.5.0 Special Education Individual Student Records**—Records with all personally identifiable information redacted are not individual student records and may be maintained for program evaluation and compliance as specified in Section 5.0 of the schedule.

| 4.5.0 | Expired School Districts GRS (2010) Special Education Individual Student Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 4.5.1 | Evaluation Records | 1 year after student graduates or leaves school system unless extended by consent. | Public School District GRS | PUBSC440 Individuals with Disabilities Education Act (IDEA) Records, EVT + 1 year and destroy confidential / Event is date student graduates or withdraws from district |
| 4.5.2 | Individual Education Program (IEP) | 1 year after student graduates or leaves school system unless extended by consent. | Public School District GRS | PUBSC440 Individuals with Disabilities Education Act (IDEA) Records, EVT + 1 year and destroy confidential / Event is date student graduates or withdraws from district |

SPECIAL EDUCATION RECORDS – SPECIAL EDUCATION RECORDS

| 5.1.0 | Expired School Districts GRS (2010) Special Education Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \*  |
| --- | --- | --- | --- | --- |
| 5.1.1 | Special Education Plan/Claim (PI-2199 or equivalent) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.2 | IDEA Application/Plan (PI-2111) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.2.1 | Flow-Through Funds | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.2.2 | Discretionary Funds | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.2.3 | Local Educational Agency Transfer Funds | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.2.4 | Preschool Entitlement Funds | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.2.5 | Preschool Discretionary Funds | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.3 | IDEA Federal Student Data Report (PI-2197) | 4 years after end of project year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI  |
| 5.1.4 | Registration of Blind Students (PI-2015) | 4 years after end of project year | Public School District GRS | PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation |
| 5.1.5 | National Instructional Materials Access Center and Accessibility Standard Statement of Assurance (PI-2194) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.1.5 | School District Plan, Part A Exceptional Needs | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |

SPECIAL EDUCATION RECORDS - OTHER STUDENT RECORDS

| 5.2.0 | Expired School Districts GRS (2010) Special Education Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023) Recommended Retention Schedule \* |
| --- | --- | --- | --- | --- |
| 5.2.1 | Full-Time Open Enrollment Program Notice of Assignment and Notice of Intent to Attend (PI-9415) | 5 years | Public School District GRS | PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later |
| 5.2.2 | Nonresidential School District Approval or Denial of Open Enrollment Application (PI-9416) | 5 years | Public School District GRS | PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later |
| 5.2.3 | Resident School District Approval or Denial of Open Enrollment Application (PI-9417) | 5 years | Public School District GRS | PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later |
| 5.2.4 | Appeal of School District Denial of Open Enrollment (PI‑9418) | 5 years | Public School District GRS | PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later |
| 5.2.5 | Request for Tuition Waiver Due to Move—(PI-9419-A) | 5 years | Public School District GRS | PUBSC700 Tuition Waiver Records, EVT + 3 years and destroy confidential / Event is date waiver is approved |
| 5.2.6 | Request for Tuition Waiver Due to Move —(PI-9419-B) | 5 years | Public School District GRS | PUBSC700 Tuition Waiver Records, EVT + 3 years and destroy confidential / Event is date waiver is approved |
| 5.2.7 | Request for Tuition Waiver Due to Move (Spanish Version) (PI-9419-B Spanish) | 5 years | Public School District GRS | PUBSC700 Tuition Waiver Records, EVT + 3 years and destroy confidential / Event is date waiver is approved |
| 5.2.8 | Public School Open Enrollment Approval/Denial Summary (PI-9420) | 5 years | Public School District GRS | PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later |
| 5.2.9 | Alternative Education Program Grant Application (PI‑9710) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.2.10 | Disproportionality Application (PI-8801) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.2.11 | State AODA Grants: AODA Program Interim Report (PI‑7101/PI-7102) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.2.12 | Transfer of Service Exemption Request – Special Education (PI-5001-A) | 4 years after end of project year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.13 | SAGE Year End Report & Contract Update (PI‑SAGE‑1‑EOY) | 1 year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.14 | SAGE State Aid Entitlement (PI-SAGE-ENT) | 1 year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.15 | SAGE Performance Objectives (PI-SAGE-1-O) | 4 years after end of project year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.16 | School Performance Report (PI-SPR) | 15 years | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.17 | High-Cost Special Education Initiative Claim Form (Pi‑1570) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.2.18 | Special Education Procedural Compliance Self-Assessment Report and Corrective Action Plan (PI-3202) | 4 years after end of project year | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.19 | Application to Offer GED Option #2 (PI-8201) | Permanent | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |
| 5.2.20 | District Waiver for One percent Cap—WI Alternate Assessment (WAA) – Students with Disabilities | 4 years after the end of the project | Public School District GRS | PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI |
| 5.2.21 | Local Use Form; Homeless Student Identification (PI‑Q03‑8) | 4 years after end of project year | Administrative Records GRS | ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent |

# **MISCELLANEOUS RECORDS**

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| --- | --- | --- | --- | --- |
| 6.1.0 | Expired School Districts GRS (2010) Miscellaneous Records | Retention Period\* | Superseded General Records Schedule | Current WI Public School District GRS (2023)Recommended Retention Schedule |
| 6.1.1 | School Newspapers | Permanent | Public School District GRS | PUBSC200 Historical Materials and Artifacts, Permanent |
| 6.1.2 | School Yearbooks | Permanent | Public School District GRS | PUBSC200 Historical Materials and Artifacts, Permanent |



1. unless subject to complaint, or lawsuit, or is a record type that requires longer retention. [↑](#footnote-ref-1)
2. **Note:** If testing results are not recorded on the achievement or cumulative record either manually or by affixing labels, the results must be retained permanently for grades 9-12 and until the date of withdrawal plus 7 years for all other grades. [↑](#footnote-ref-2)
3. [↑](#endnote-ref-1)
4. Health care records are not considered to be behavioral records–could retain longer and may need to if relates to Medicaid funds/audit. 5-7 years [↑](#footnote-ref-3)