

RECORDS RETENTION SCHEDULE

Personnel Records

The District has adopted the Wisconsin Records Retention Schedule for School Districts, which includes **Personnel Records** as adopted by the Wisconsin Public Records Board and endorsed by the Wisconsin Department of Public Instruction, which is available for public inspection.

Adoption Date: January 22, 2001

Amended Date: February 10, 2020

Updated Date: June 27, 2023

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3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule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

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.6	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

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Employee Records (continued)

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
3.1.10.3	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

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Employee Records (continued)

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
3.1.12	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

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Employee Records (continued)

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
3.1.18	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

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Employee Records (continued)

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
3.1.22	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

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Employee Records (continued)

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
3.1.27	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

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Employee Records (continued)

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
3.1.32	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

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Employee Records (continued)

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
3.1.34	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)

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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
3.1.38	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

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