



Wisconsin Public School District
GENERAL RECORDS SCHEDULE
Crosswalk

Revised October 2023

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The PRB directed that retention schedules from the 2010 GRS that include non-school district specific records should be superseded by other state and local retention schedules approved and made available by the PRB.

This crosswalk attempts to identify the state and local retention schedules that most closely align with superseded 2010 GRS retention schedules in order to aid school districts in transitioning to use of the retention schedules approved and made available by the PRB.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This crosswalk displays each superseded 2010 GRS retention schedule. Each superseded 2010 GRS retention schedule crosswalks to a PRB approved retention schedule, and identifies its location within other state and local general records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

* No RDA numbers are assigned to schedules in this General Records Schedule.

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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

* This crosswalk is provided for informational purposes only and reflects information available as of May 2023. The Public Records Board, not the DPI, has authority over the interpretation and adoption of the schedules referenced by this crosswalk. Decisions on how to dispose of records should be made in consultation with local legal counsel.

School Board Records (continued)

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*
1.1.5	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

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School Board Records (continued)

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*
1.1.11	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

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School Board Records (continued)

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*
1.1.16	Management Correspondence/Memos	1 year 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 unless subject to complaint, or lawsuit, or is a record type that requires longer retention.

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School Board Records (continued)

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*
1.1.20	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

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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

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School Board Records (continued)

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*
1.2.7	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

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ADMINISTRATIVE RECORDS – TRANSPORTATION RECORDS

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

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School Board Records (continued)

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
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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

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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

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Program Applications/Evaluations (continued)

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*
1.5.6	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

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Program Applications/Evaluations (continued)

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*
1.5.11	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

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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

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Purchasing/Payroll Records (continued)

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 *
2.1.6	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

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Purchasing/Payroll Records (continued)

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 *
2.1.12	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

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Purchasing/Payroll Records (continued)

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 *
2.1.19	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

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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

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Accounting/Budget (continued)

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 *
2.2.6	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

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Accounting/Budget (continued)

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 *
2.2.12	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

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Accounting/Budget (continued)

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 *
2.2.19	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

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Accounting/Budget (continued)

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 *
2.2.27	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

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Accounting/Budget (continued)

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 *
2.2.27.7	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

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FINANCE RECORDS – FOOD SERVICES RECORDS

2.2.34.0	Expired School Districts GRS (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

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Food Service Records (continued)

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

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Food Service Records (continued)

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

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Food Service Records (continued)

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

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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)

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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
3.1.5	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

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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	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

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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
3.1.11.1	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

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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
3.1.15	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

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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
3.1.20	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 (FLSA) 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

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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
3.1.25	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

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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
3.1.30	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	<p>OSHA – Employee Medical Records</p> <p>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.</p>	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

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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
3.1.37	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

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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
3.1.42	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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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

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Student Records (continued)

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 *
4.1.5	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

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Student Records (continued)

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 *
4.1.10	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

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Student Records (continued)

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 *
4.1.16	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

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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

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Student Progress Records (continued)

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 *
4.2.1.4	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

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Student Progress Records (continued)

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 *
4.2.2	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, i}	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

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.

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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	a) 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. b) Health Care Provider Records (Patient Health Records)	1 year after student graduates or leaves school system, unless extended by consent. 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

³ 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

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Student Health Care Records (continued)

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*
4.3.3	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

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Student Health Care Records (continued)

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*
4.3.6	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

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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 — <i>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.</i>	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

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Student Records (continued)

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 *
4.4.4	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 years 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

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Student Records (continued)

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 *
4.4.7	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

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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

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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

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Special Education Records (continued)

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 *
5.1.2.5	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

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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

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Special Education Records (continued)

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 *
5.2.4	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

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Special Education Records (continued)

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 *
5.2.8	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

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Special Education Records (continued)

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 *
5.2.13	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

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Special Education Records (continued)

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 *
5.2.18	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

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MISCELLANEOUS RECORDS

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

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