

**City Information Management Committee Retention Schedules
September 4, 2025**

#'s	Major	Organizations	Schedule Code	Schedule Title	Schedule Description	Review Type	Event Code	Years	Disposition	Review Notes
1	Assessor' Office		15-0022	Exemption Reports- Bi-Annual	Records filed by property owners with the City Assessor's Office for properties that are exempt from property taxes in the City of Milwaukee under Wis Stat. § 70.11 . In addition to the form itself, this series may also include correspondence between the assessors and the property owner, supplementary evidence of eligibility, and Unrelated Business Income Report if the property is taxed in part.	Amend	Creation		Destroy 3 Confidentially	Updated description; no functional changes to series content or description.
2	City Treasurer	Customer Service	15-0025	Customer Service Division Correspondence Files- Paper		Close	Creation		Destroy 0 Confidentially	Supersede 20-0011 (Routine Correspondence).
3	City Treasurer	Customer Service	15-E025	Customer Service Division Correspondence Files		Close	Creation		Destroy 7 Confidentially	2025: Supersede 20-0011 (Routine Correspondence).
4	City Treasurer	Financial Services	15-E024	Financial Services Operations Files- Electronic Image		Close	Creation		Destroy 7 Confidentially	Supersede 18-0010 (Cash Management).
5	City Treasurer	Financial Services	15-0024	Financial Services Operations Files- Paper		Close	Creation		Destroy 0 Confidentially	Merge with 15-E024.
6	City Treasurer	Revenue Collection	15-E028	Return Remittance Bill Payment Envelopes	Digitized return remittance bill payment envelopes for tax payments received by mail. These are retained by the City Treasurer's Office to prove the timeliness of delinquent payments.	Amend	Creation		Destroy 1 Confidentially	Updated description and title.
7	City Treasurer	Revenue Collection	15-0023	Revenue Collection Operations Files- Paper		Close	Creation		Destroy 0 Confidentially	Supersede 18-0010 (Cash Management). No boxes in inventory.
8	City Treasurer	Revenue Collection	15-0028	Return Remittance Bill Payment Envelopes- Paper		Close	Creation		Destroy 0 Confidentially	Merge with 15-E028.
9	City Treasurer	Revenue Collection	15-E023	Revenue Collection Operations Files- Electronic Image		Close	Creation		Destroy 4 Confidentially	Supersede 18-0010 (Cash Management)
10	City Treasurer	Tax Enforcement	15-E026	Authorization Agreement For Property Tax	Enrollment applications for taxpayer participation in the installment tax program, including authorization of electronic fund transfers of tax payments as well as for accounts for which authorizations have been changed or cancelled.	Amend	Event		Destroy 4 Confidentially	Close-No Longer Created Per LaQuisha Schroeder 8/21/25.
11	City Treasurer	Tax Enforcement	15-E027	Lottery & Gaming Credit Program	Records used to document City tax payers' claims of Wisconsin State Lottery Credit to be applied to their property tax accounts (Wis. Stat. Å§ 70.10). In addition to form CT-206, which allows tax payers to claim the credit, the series includes supporting documentation, including Proof of Residence documentation, as well as forms sent to the City withdrawing the claim for reasons of no longer using the property as primary residence.	Amend	Creation		Destroy 4 Confidentially	Updated description. This series includes proof of residence and may be worth further discussion for PII concerns.
12	City Treasurer	Tax Enforcement	15-E029	Property Tax Account Transaction Documents	Records documenting all account-level changes and activities for a given property owing tax, including mailing address change requests, contemplated special assessments and charges added to the tax roll, bank lock box returned items, Non-Sufficient Funds (NSF) payments, and property tax refunds. Most of these changes are performed programmatically within the City Treasurer's tax account management system.	Amend	Creation		Destroy 3 Confidentially	Updated description and title.
13	City Treasurer	Tax Enforcement	15-0026	Authorization Agreement- EFT For Property Tax Installments - Paper		Close	Creation		Destroy 0 Confidentially	Close-No Longer Created Per LaQuisha Schroeder 8/21/25.
14	City Treasurer	Tax Enforcement	15-0027	Lottery and Gaming Credit Program - Paper		Close	Creation		Destroy 0 Confidentially	Merge with 15-E027.
15	City Treasurer	Tax Enforcement	15-0029	Property Tax Account Transaction Documents- Paper		Close	Creation		Destroy 0 Confidentially	Merge with 15-E029.

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16	Citywide Global Schedules		25-0006	Liability Waivers	Forms created and disseminated by City Departments to document a member of the public's acknowledgement of possible risks associated with City-sponsored activities (including large-scale events, work by City employees on private property, tours of typically non-public areas and Milwaukee Police squad car ride-alongs). Activity participants typically sign these forms to indicate a promise to hold the City harmless in the event of injury.	NEW	Event		Destroy 1 Confidentially	Held from 2025Q2 pending second opinion from CAO on retention period.
17	Citywide Global Schedules		67-0027	Commodity/Service Specification	Detailed descriptions of commodities purchased by City departments or of recurring/complex service needs for which a request for proposal is indicated as the most effective means of procurement evaluation. The specification may include a written description of the commodity or service, technical or technological requirements, schematics diagrams or design files, correspondence with potential vendors for clarification, and other related documentation.	Amend	Event		1	This schedule was apparently left off of a RMS migration at some point after 1995 and is being reintroduced as a global schedule, as departments such as DPW may maintain their own versions of specifications.
18	Citywide Global Schedules		19-0010	Visitor Access and Appointment Logs	This record series includes documentation related to temporary assignment of access to facilities or secure areas on City of Milwaukee properties, and/or record of appointments scheduled.	Amend	Fiscal Year End		Destroy 3 Confidentially	Revising this schedule as a global.
19	Department of Administration	Purchasing Division	25-0016	Preference Program Monitoring Documentation	Records related to monitoring compliance with purchasing programs providing incentives and/or requirements for various preferred vendor characteristics. Compliance with these programs is monitored throughout the term of the contract and may include Purchasing forms, periodic reports of compliance, employee complaints, enforcement actions and appeals, correspondence, and documentation of sanctions up to and including termination of contract.	NEW	Event		3 Destroy	New Schedule discovered during review of department records.
20	Department of Administration	Purchasing Division	25-0017	Preference Program Affidavits	Affidavits submitted to Purchasing as part of a vendor's bid response, indicating that the vendor meets criteria for preferential bid scoring and/or bid requirements. The series may also include record of any waivers of Preference Program requirements made by the Purchasing Director. This series is distinct from 25-0016 (Preference Program Compliance) in that the affidavits are provided at the point of bid submission and/or award, rather than as a component of ongoing compliance.	NEW	Fiscal Year End		2 Destroy	New Schedule discovered during review of department records. See also 16-0046 (SBE Certification Files) and 11-0052 (Certification Denial Files), which may include copies of these records.
21	Department of Administration	Purchasing Division	25-0018	Slavery Era Business and Profit Disclosures	Per Milwaukee Code of Ordinances 310.14, all contracting companies founded prior to 1865 are required to file an affidavit as part of the bid process detailing any profits or investments based on slavery and slaveholder insurance policies, or that no records of such outcomes exist following a search of "any and all" corporate records. The series also includes the names of any enslaved persons or slaveholders found in the records, and must be made available to the public per the ordinance. The proposed retention for this series is Permanent due to the ongoing historical interest in and relevance of Slavery-related activities and profits by potential City of Milwaukee Contractors.	New			Permanent	New Scheduled identified during survey of Department records.

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22	Department of Administrat	Purchasing Division	25-0019	Bid Documentation and Evaluation-- Unsuccessful Bidders	Bids or Proposals submitted in response to a bid opportunity or request for proposal offered by the Purchasing Division but not ultimately selected as the successful vendor or contractor. This series includes the bid response, any supplementary documentation including product specifications, software or other commodities provided for demonstration purposes, questions submitted in response to a bid opportunity, correspondence between the City and vendor, or video recordings of interviews, evaluations, or product demonstrations.	NEW	Event		Destroy 3 Confidentially	New schedule identified during survey of departmental records.
23	Department of Administrat	Purchasing Division	97-0031	X-Files	Files for bids never awarded, either because no bids were received, no complying bids were received, or bids received were all higher than budgeted for. Series content includes the original bid draft, final drafted bid, vendor mailing list, any specifications, correspondence, notes to the file, purchasing agent's recommendation for not awarding the bid and purchasing director's approval/concurrence with recommendation.	Amend	Event		Destroy 6 Confidentially	Update Description and Retention Period.
24	Department of Administrat	Purchasing Division	12-0015	Contract Development Documents	All records of the contract development and maintenance process not included as part of the official signed contract (RRDA #13-E029). Records in this series include, but are not limited to, original signed bids or requests for proposals, bid tabulations, correspondence, contract drafts redlined by Office of the City Attorney, contract extension documentation, Exception to Bid Forms and related documentation, contract compliance forms, and other materials provided by vendors for the purpose of evaluating products for purchase. Box 16: Wis. Stat. 19.36(5). However, the presumption of access should be maintained for these records in general, and 19.36(6) should apply here in particular.	Amend	Event		Destroy 6 Confidentially	Revised retention period to bring in line with Statewide Procurement retention schedules.
25	Department of Administrat	Purchasing Division	13-E029	Awarded Contracts	Official record of Contracts awarded to vendors during the bid or exception to bid process. The standard contract or amendment file includes the contract number, vendor name, payment amount, payment terms, and a description of what is being purchased. This schedule pertains specifically to the signed and scanned or born-electronic digitally signed contract and amendments, both of which will be stored in a secure electronic document management system to provide maximum authenticity of the contract.	Amend	Event		Destroy 6 Confidentially	Updated retention to Contract Close + 6 to bring in line with statewide procurement retention schedules.
26	Department of City Develop	Real Estate	11-0014	Property Acquisition--Rejected/Cancelled Bids	Beginning in March 2024, City property acquired as a result of tax delinquency became subject to Wis. Stat. Å§ 75.69, which sets certain requirements for listing these properties for sale, setting the price of the property at assessed value, and for justifying any non-accepted low bids in a public statement. To maintain compliance with this statute, DCD will increase the retention of records in this series to 6 years after rejection of bid.	Amend	Creation		Destroy 6 Confidentially	Updated description and retention time to reflect changes from Wis Stat. 75.69. Related series 10-0048 and 11-0011 are already maintained for 6 or more years after close and thus do not require changes at this time.
27	Department of Neighborho	Development Center	25-0014	Non-Building Permits	Permits issued by the Development Center not tied to a particular property or address, including temporary event permits, temporary noise variance applications, hydrant permits, community garden permits, and special privileges permits. These permits are typically event-driven and temporary in applicability, and as such do not maintain the same level of long-term administrative value.	NEW	Event		7	New Schedule discovered during survey of department records.

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28	Department of Neighborhood Development Center		73-0101	Completed Permit/Premises Record	Permits and related records for all new construction and additions/modifications on residential or commercial buildings within the City of Milwaukee. Records may include, but are not limited to, permit applications, correspondence with owner or contractor, property surveys or site plans, inspection reports, letters of supervision, code violation enforcement orders, raze orders, erosion control letters, plan approval letters, and other documents pertaining to construction. These records are currently under permanent retention due to ongoing administrative use by the development center and ongoing historical interest by contractors and researchers..	Amend	Creation		0 Permanent	Updated Description and added format information.
29	Department of Neighborhood Development Center		02-0004	Daily Permit Records		Close	Creation		0 Permanent	Supersede 73-0101 (Completed Permit/Premises Record). No records in inventory.
30	Department of Neighborhood Development Center		02-S004	Daily Permits (Paper)		Close	Event		0 Confidentially	Supersede 73-0101 (Completed Permit/Premises Record). No records in inventory.
31	Department of Neighborhood Development Center		15-0020	Completed Permits		Close	Creation		0 Permanent	Supersede 73-0101 (Completed Permit/Premises Record). No records in inventory.
32	Department of Neighborhood Development Center		85-9082	Permit, Office Copy, Daily, Microfilm Jacket		Close	Event		0 Permanent	Close-No Longer Created. Retain any existing inventory under 73-0101 (Premises Record).
33	Milwaukee Health Department	Communicable Disease Control	25-0015	Isolation Site Intake and wellness check forms	Records documenting patient stays at City of Milwaukee-run shelters established to help limit the spread of infectious disease in hospitals and/or the community. The series includes questionnaires about the type and severity of disease, referrals by medical professionals of patients to the isolation sites, consent for treatment, and record of patient vital signs collected during wellness checks, used to assess the possibility of discharge from the site.	NEW	Event		3 Destroy Confidentially	New series created at request of Milwaukee Health Department.
34	Milwaukee Health Department	Administration	00-0052	Detail Program Revenue Worksheets		Close	Creation		7 Destroy Confidentially	Supersede 18-0008 (Accounts Receivable).
35	Milwaukee Health Department	Communicable Disease Control	13-E006	Immunization Records (E-Vault)		Close	Creation		0 Permanent	Supersede 80-0079 (Immunization Consent Forms). Per MHD the records themselves should be maintained permanently on E-Vault, as they are not in the Wisconsin Immunization Registry.
36	Milwaukee Health Department	Communicable Disease Control	13-9006	Immunization Records (Film)		Close	Creation		0 Permanent	Supersede 80-0079 (Immunization Consent Forms)
37	Milwaukee Health Department	Communicable Disease Control	74-0104	List - Alphabetical - Immunizations Given In Last		Close	Event		0 Destroy Confidentially	Supersede 80-0079 (Immunization Consent Forms)
38	Milwaukee Health Department	Communicable Disease Control	73-0037	Lab Reports - Misc Duplicate		Close	Creation		1 Destroy Confidentially	Close-Non-Record
39	Milwaukee Health Department	Family and Child Health	09-0036	Depression Screen Records	Records of tests performed in conjunction with various Family and Community Health programs, including Empowering Families of Milwaukee (EFM), Direct Assistance for Dads (DAD), and Birth Outcomes Made Better (BOMB) Doulas, to identify pre- and post-natal depression and depression risk among participating caregivers.	Amend	Creation		7 Destroy Confidentially	Updated description to include programs and remove mention of specific/outdated tests.
40	Milwaukee Health Department	Family and Child Health	70-0125	Complete Nursing Home Record		Close	Creation		7 Destroy Confidentially	Closed-No Longer Created.
41	Milwaukee Health Department	Laboratories	69-0147	Water Examination	Water quality testing records based on samples taken from Milwaukee beaches and received from the Milwaukee County Zoo for the purpose of testing for e-coli or bacterial contaminants. In addition to the test results, this series also includes worksheets, bench sheets, and correspondence between Environmental Health, Health Labs, and the State Department of Natural Resources.	Amend	Fiscal Year End		10 Destroy Confidentially	Updated Description
42	Milwaukee Health Department	Laboratories	69-0150	Analyses Of Milk and Cream		Close	Creation		3 Destroy	Close-No Longer Created. Confirmed by David Payne as not created August 2025.

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43	Milwaukee Health Departm	Laboratories	95-0191	Cryptosporidium/Giardia Sample Request Form		Close	Fiscal Year End		Destroy 10 Confidentially	Supersede 69-0147 (Water Examination).
					Reports received from hospitals, hospices, nursing homes, and other facilities managing human remains confirming individual deaths and transferring custody of the remains to next of kin for burial, cremation, or out-of-state transit. The Milwaukee Health Department Vital Statistics Office may receive this report as local registrar of deaths per Wis. Stat. § 69.18.				Destroy 1 Confidential	Updating retention and description; adding confidentiality citation.
44	Milwaukee Health Departm	Vital Statistics	96-0001	Report for Disposal of Human Remains		Amend	Event			
45	Milwaukee Health Departm	Vital Statistics	96-0006	Confirmed Cryptosporidiosis Questionnaire and Duss		Close	Creation		0 Permanent	Confirmed by MHD Labs that these are no longer created. Historical Records are not in WEDSS and should be preserved under a different series (Communicable Disease Reports?)

Count of Schedule Code Row Labels	Column Labels			Grand Total
	NEW	Amend	Close	
Citywide Global Schedules	1	2		3
Department of Neighborhood Services	1	1	4	6
Assessor' Office			1	1
City Treasurer		4	10	14
Department of Administration	4	3		7
Department of City Development			1	1
MHD-386	1			1
Milwaukee Health Department		3	9	12
Grand Total	7	15	23	45

