

## SCHEDULES FOR CIMC REVIEW - SEPTEMBER 20, 2018

#	Org	Dept.	Schedule #	Title	Request Type	Record Content & Purpose	Retention/ Location	Final Disposition	State Board Approval Required (Y/N)
1	130	City Clerk/ Legislative Reference Bureau (LRB)	18-0060	<u>Research Files- Routine Matters</u>	New	Background material and related reports compiled by LRB analysts in response for information by a member of the Common Council, Mayor, or other City Official. Files may include, but are not limited to, draft legislation, original research, best practices surveys, fiscal analyses, reports to City Officials, and other supporting documentation. Routine Matter Research Files typically pertain to requests for technical assistance by the Common Council and its standing and ad hoc committees, or analyses of minor changes to City Ordinance or policy. Reports completed but not formally acted on by the commissioning Council member or department may also fall under this series. These records may have some administrative value depending on their topic, but typically do not retain long-term historical or research value.	Event (Close of File) + 3 yrs./Office + 4 yrs./City Records Center	Destroy Under Supervision	Yes
2	130	City Clerk/ Legislative Reference Bureau (LRB)	18-0061	<u>Research Files- Historically Significant</u>	New	Background material and related reports compiled by LRB analysts in response for information by a member of the Common Council, Mayor, or other City Official. Files may include, but are not limited to, draft legislation, original research, best practices surveys, fiscal analyses, reports to City Officials, and other supporting documentation. Records of this type are typically considered historically significant if they relate to a major ordinance or policy creation or change, relate to a person, place or event relevant to City government interests, or are used to assist with fiscal analysis or other major departmental or Common Council Action. Because of the high potential ongoing administrative and research value of such files, they should be maintained permanently in the City Archives.	Event (Close of File) + 1 yr./Office	Transfer to City Archives at the Municipal Research Center	Yes
3	154	Environmental Collaboration Office (ECO)	18-0049	<u>ECO Agreements and Contracts</u>	New	Contracts between the Environmental Collaboration Office and its various governmental and non-governmental partners, usually in support of a program or one-time collaboration. The contract file may also include supplementary documentation, such as correspondence, amendments, supporting documents or other related records.	Event (Close of Contract) + 3 yrs./Office + 4 yrs./City Records Center	Destroy Under Supervision	Yes
4	154	Environmental Collaboration Office (ECO)	18-0050	<u>Grant Files- Federal</u>	New	Documentation of grants received by the Environmental Collaboration Office from Federal Government sources for the purposes of administering a program or project. Files may include, but are not limited to, applications, program plans, documentation of awards/agreements, Common Council resolutions, evaluation materials and responses, records of receipts and expenditures, vendor invoices, periodic financial and activity reports and general correspondence. Per Wisconsin Grant Reporting requirements, records of grants received by City entities must be retained for a period of 4 years following the final expenditure report submission to the grantor.	Event (Final Expenditure Submission) + 4 yrs./Office	Destroy Under Supervision	Yes
5	154	Environmental Collaboration Office (ECO)	18-0051	<u>Grant Files- Philanthropic</u>	New	Documentation of grants received by the Environmental Collaboration Office from philanthropic (non-governmental) sources for the purpose of administering a program or project. Files may include, but are not limited to, applications, program plans, documentation of awards/agreements, Common Council resolutions, evaluation materials and responses, records of receipts and expenditures, vendor invoices, periodic financial and activity reports, and general correspondence.	Event (Final Expenditure Submission) + 3 yrs./Office	Destroy Under Supervision	Yes
6	154	Environmental Collaboration Office (ECO)	18-0052	<u>Grant Reports- Final</u>	New	Final narrative report for grants received and administered by the Environmental Collaboration Office. These reports typically document the activities and impact of a grant project, and as such are critical for tracking the historic activities of ECO.	Creation + 4 yrs./Office	Destroy Under Supervision	Yes

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7	154	Environmental Collaboration Office (ECO)	18-0053	<u>PACE Program Files</u>	New	Program files for the Property Assessed Clean Energy (PACE) program, an ECO-administered financing component of the public/private Milwaukee Energy Efficiency program. Files include foundational documents, program manuals, agreements with participating lenders and other private-sector partners, event files, and records related to the annual ReEnergize Milwaukee Awards Ceremony.	Creation + 3 yrs./Office + 4 yrs./City Records Center	Transfer to the City Archives at the Milwaukee Public Library	Yes
8	154	Environmental Collaboration Office (ECO)	18-0054	<u>PACE Applications-Accepted</u>	New	Accepted application files for participation in the Property Assessed Clean Energy (PACE) program. Files may include, but are not limited to, the initial interest form, bids from participating contractors, benchmarks and savings analyses, documentation of mortgage holder consent, financing offers and agreements, change orders, property appraisals, cost breakouts, and residents' preference program documentation.	Event (End of Project or Relationship) + 3 yrs./Office + 4 yrs./City Records Center	Destroy Under Supervision	Yes
9	154	Environmental Collaboration Office (ECO)	18-0055	<u>PACE Applications-Rejected</u>	New	Application files for participation in the Property Assessed Clean Energy (PACE) program that are not ultimately approved for PACE financing. Files may include, but are not limited to, the initial interest form, bids from participating contractors, benchmarks and savings analyses, documentation of mortgage holder consent, property appraisals, cost breakouts, and residents' preference program documentation.	Event (Date of Rejection) + 3 yrs./Office	Destroy Under Supervision	Yes
10	154	Environmental Collaboration Office (ECO)	18-0056	<u>David-Bacon Contractor Payroll Records</u>	New	Payroll records for contractors employed by the Environmental Collaboration Office for projects funded by the American Reinvestment and Recovery Act of 2009. Per the Davis-Bacon Act of 1931, certified payroll for contractors on government-funded construction projects must be submitted to the Department of Labor to ensure that a prevailing wage is being paid to those contractors. Per 29 CFR 5.5(a)(3)(i), ECO must retain payroll records created under the Davis-Bacon Act for a minimum of 3 years following the close of the relevant project.	Event (End of Project) + 3 yrs./Office	Destroy Under Supervision	Yes
11	154	Environmental Collaboration Office (ECO)	18-0057	<u>Credit Union Report Records</u>	New	Reports of loans issued by Summit Credit Union for home improvement projects funded through the Me2 program administered by the Environmental Collaboration Office. Summit Credit Union provides record of loan approval, repayment status, and project progress to the City of Milwaukee to provide a means of assessment regarding the success of the Me2 program; Summit handles the loan applications and administration directly, and ECO is not involved in managing the financial aspect of individual Me2 funded projects.	Event (End of Project) + 3 yrs./Office + 2 yrs./City Records Center	Destroy Under Supervision	Yes
12	156	City Clerk/Document Services Section	70-0043	<u>Annual Report and Statistics</u>	Amend	This schedule is being amended to revise the title and description. This schedule contains annual reports and statistics for the Document Services Section and City Records Center which are used to compare productivity of the various functions of the department from year to year. Functions reported on within the department include Records (Production, Reference, Imaging, Storage and Destruction), Mail Room (Quantity and Cost), and prior to 2011 Printing (Inventory, Images, Cost, Reimbursable, etc.). It is useful to retain these records in the archives to document the history of the department and to monitor fluctuations in work progress. The official record will be maintained electronically in E-vault. Scanned documents will be retained for 3 months after input to E-vault for quality control/verification.	Creation 1 + yr./Office	Transfer to City Archives at the City Records Center (E-vault)	Yes

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13	156	City Clerk/Document Services Section	70-0046	<u>Routine Correspondence</u>	Renewal	This schedule contains routine correspondence between the City Records Center and the departments regarding transfer, storage and destruction of their records.	Fiscal year + 7 yrs./City Records Center	Destroy Under Supervision	Yes
14	156	City Clerk/Document Services Section	70-0049	<u>Destruction Record</u>	Renewal	Destruction record reports can be printed on demand from the City's Record Management System. Report contains schedule number and title, box number and location, date destroyed and department.	Fiscal year + 25 yrs./City Records Center	Destroy Under Supervision	Yes
15	156	City Clerk/Document Services Section	70-0054	<u>Charge Out Slips</u>	Amend	This schedule is being amended to revise the title and description. Charge out slips are used to take both internal department and public customer requests for record retrieval. Information on the card includes, department name/number, record title, date requested, location, borrower's signature, phone number, request number and initials and time spent filling the request. This information is entered into the Records Management System where requests are tracked.	Event (Entered into the system) + 3 mo./City Records Center	Destroy Under Supervision	Yes
16	156	City Clerk/Document Services Section	74-0180	<u>Record Transfer List</u>	Amend	This schedule is being amended to revise the title and description. Transfer Lists are used by City departments to send boxes to the City Records Center for storage. Information contained on the Transfer List include department/division, records coordinator name and phone number, temporary box number, schedule number, start/end dates, record title and range, permanent box number, location, signature and date transfer was received. The official record will be maintained electronically in E-vault. Scanned documents will be retained for 3 months after input to E-vault for quality control/verification.	Creation + 25 Yrs./E-vault	Destroy Under Supervision	Yes
17	156	City Clerk/Document Services Section	95-0199	<u>Vendor Information Files</u>	Amend	This schedule is being amended to revise the description to include records previously retained under schedule 95-0198 <u>Contract Reference Files</u> . This schedule contains files related to vendors under contract with the City of Milwaukee for services provided to the Document Services Section and the City Records Center. Files may contain, but are not limited to, vendor contact information, correspondence, contract specifications, calls for services, receipt of technician's summary of service provided, logs of any ongoing issues, supplies on-hand and ordered, etc. Official contract files are maintained by DOA-Procurement Office.	Event (Termination of Contract) + 2 Yrs./Office	Destroy Under Supervision	Yes
18	156	City Clerk/Document Services Section	99-8023	<u>B.I. Premises Microfilm Control Sheets</u>	Renewal	This schedule contains addresses of Building Inspection (B.I.) Permits microfilmed from the 1960s through 1999. Microfilm operators used the list to mark microfilm roll number for each address filmed. This schedule is being renewed as it will be used in association with the project to digitize all permits and retain them for archival preservation in E-vault. Once the project is complete, the control sheets can be destroyed and this schedule can be closed.	Event (Microfilm Collection Digitized) + 1 yr./City Records Center	Destroy Under Supervision	Yes
19	191	Department of City Development (DCD)/ Commissioner's Office	18-0062	<u>Project Grant Files- Milwaukee Arts Board</u>	New	This record series includes Milwaukee Arts Board Project grant files (City of Milwaukee and State of Wisconsin funded) that are awarded annually to City-based arts organizations to fund art, music, dance, arts education and other projects. Each file typically includes, but is not limited to, an application, award/agreement, budget report, reports, project images, print material, payment documentation, reimbursement requests, completion documentation and correspondence.	Event (Disbursement of Final Payment) + 2 yrs./Office + 3 yrs./City Records Center	Destroy Under Supervision	Yes

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20	191	Department of City Development (DCD)/ Commissioner's Office	18-0063	<u>Non-Funded Grant Files- Milwaukee Arts Board</u>	New	This record series consists of grant applications and supplementary materials for grants not selected to receive funding from the Milwaukee Arts Board or for withdrawn or incomplete grant applications. Applications may relate either to Project grants, which are made annually to City-based arts organizations to fund art, music, dance, arts education and other projects, or to Public grants, which are more generalized grants made from the New Work Fund and the Public Art Conservation Fund. Each Project or Public grant file typically includes an application and correspondence. Project grant files may include supplementary materials, including project staff resumes, IRS Form 990, annual financial statements and charter documents; these records are retained to ensure fairness and transparency in the granting process.	Event (Date of Denial/ Application Withdrawal) + 3 yrs./Office	Destroy Under Supervision	Yes
21	287	Employees' Retirement System (ERS)	02-0023	<u>ERS Member Handbook and Brochures</u>	Amend	This schedule is being amended to revise the title and description. This record series contains member informational handbooks that have been issued by the ERS/Annuity and Pension Board since 1938, as well as various benefit-related brochures (i.e. retirement, intrastate reciprocity, disability, and review/appeal procedures). These documents are periodically updated to reflect revised information. In 2007, ERS began publishing an electronic record (pdf) of the handbook and brochures on its website (www.cmers.com). Current member handbook and benefit brochures are retained at the City of Milwaukee's Legislative Reference Bureau in accordance with MCO Sec. 305-32 for permanent storage.	Event (Documents Superseded) + 1 yr./Office	Transfer to City Archives at the Legislative Reference Bureau	Yes
22	287	Employees' Retirement System (ERS)	18-0064	<u>1099-R Tax Reporting</u>	New	As the retirement plan administrator for the City of Milwaukee, the Employees' Retirement System (ERS is charged with issuing benefit payments (i.e., retirement, disability, separation and death) to its members and their beneficiaries. Most payments are taxable and subject to tax-reporting requirements. The ERS is required to furnish payees with an annual 1099-R Tax Reporting Form, "Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc." The form contains the payee's name, address, a tax identification number (generally the payee's social security number), the distribution amounts for the tax-reporting year, and any income taxes withheld (federal/state withholdings only). Commencing in 2006, raw data used to generate the 1099-R tax form is maintained in Merits (pension information management system). An electronic image of the tax reporting form is indexed under the payee's Person ID Number and stored in Merits.	Event (Death of payee or final payment) + 10 yrs./Office	Destroy Under Supervision	Yes
See Delete/Superseded Schedule Request Form for 20 schedules from the City Clerk/Legislative Reference Bureau									
See Delete/Superseded Schedule Request Form for 23 schedules from the Common Council/Central Admin. Office									
See Delete/Superseded Schedule Request Form for 13 schedules from the Common Council/Council Services Office									
See Delete/Superseded Schedule Request Form for 30 schedules from the City Clerk/Document Services Section									
See Delete/Superseded Schedule Request Form for 11 schedules from the Employees' Retirement System.									



**Office of the Common Council - City Clerk  
City Records Center**

**Jim Owczarski**  
City Clerk  
jowcza@milwaukee.gov

**Bradley Houston**  
City Records Officer  
Bradley.Houston@milwaukee.gov

## Delete/Superseded Schedule Request Form

**This document is used to request schedule deletion or the superseding of multiple schedules at once. By signing below, you certify that to the best of your knowledge, records in each series to be closed are no longer created, or have a final disposition date governed by an active schedule.**

Department Name: City Clerk/Legislative Reference Bureau	Department Number: 130
Department Head  Jim Owczarski	Division Head  Keith Broadnax
Department Records Coordinator  Terry MacDonald	City Records Officer  Brad Houston
City Clerk (on behalf of the CIMC)  Jim Owczarski	Date

**Option 1 – Deleting a Schedule** This option is used when the Department no longer creates or receives records for this series. **In the Details section below, provide the date of final disposition for records in the series. Contact the City Records Center for inventory information.**

**Option 2 – Superseding a Schedule** This option is used when a schedule is replaced. The Schedule entered, should be the one that will ultimately close. **In the Details section below, please indicate the Global or other record schedule to which the records are being transferred.** The “Transfer To” schedule must already exist and cannot have an expired sunset date.

<u>Schedule #</u>		<u>Series Title</u>	<u>Change Requested</u>		<u>Details</u>
1	03-9020	Departmental EEO/AA Plans	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 11-0024 (EEO/AA Plans); No Inventory
2	66-0042	MCCR Minutes and Agendas	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
3	72-9177	Minutes of the Motion Picture Commission	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 15-0007 (Minutes- City Boards, Commissions, Committees, and Task Forces); No Inventory
4	72-9183	Annual Reports 1982-1979	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
5	73-0004	Land Use Maps, Town of Lake	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
6	74-0334	Board of Supervisors Annual Report/Town of Granville	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
7	74-0336	Building Codes, Town of Granville	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
8	77-0114	Book Order Records	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0016 (Accounts Payable); No Inventory
9	77-0121	Subject File (LRB)	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0061 Research Files-Historically Significant; No Inventory
10	77-0122	Sub-Department Requisitions	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0003 (Interdepartmental Requisitions and Invoices); No Inventory



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11	88-M093	Code of Ordinances Card File-Paper	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
12	90-M005	M Collection	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
13	91-0086	Minutes of Appointment Board of MKE/Greenfield	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
14	93-0006	Response to Council Committee	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0060 Research Files-Routine; No Inventory
15	93-0009	Customized Budget Research and Analysis	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0060 Research Files-Routine; No Inventory
16	93-0011	Minor Inquiries-Fiscal Analysis	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0060 Research Files-Routine; No Inventory
17	93-9005	Standing Committee Fiscal Reports	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0061 Research Files-Historically Significant; No Inventory
18	93-M005	Standing Committee Fiscal Reports-Originals	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0061 Research Files-Historically Significant; No Inventory
19	95-0041	Coordinating Committee- Town of Granville	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
20	95-0174	Record of State Legislation Affecting Milwaukee County	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory



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Department Name: Common Council/Central Admin	Department Number: 131
Department Head  Jim Owczarski	Division Head  Jim Owczarski
Department Records Coordinator  Terry MacDonald	City Records Officer  Brad Houston
City Clerk (on behalf of the CIMC)	Date

**Option 1 – Deleting a Schedule** This option is used when the Department no longer creates or receives records for this series. In the Details section below, provide the date of final disposition for records in the series. Contact the City Records Center for inventory information.

**Option 2 – Superseding a Schedule** This option is used when a schedule is replaced. The Schedule entered, should be the one that will ultimately close. In the Details section below, please indicate the Global or other record schedule to which the records are being transferred. The "Transfer To" schedule must already exist and cannot have an expired sunset date.

<u>Schedule #</u>		<u>Series Title</u>	<u>Change Requested</u>		<u>Details</u>
1	06-0013	Personnel Files	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 11-0035 (Personnel Files); No Inventory
2	08-0002	Cable Television Franchise Agreement Documents	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created. No records in inventory (Screened)
3	64-0183	Resignation Notice (Copy)	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 11-0035 (Personnel Files); No Inventory
4	64-0190	Payroll Deduction Status Notice (Copy)	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	Non-Record; original held by Comptroller
5	64-0195	Equipment Request (Copy)	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	Non-Record; original held in FMIS; No Inventory
6	64-0196	Budget and Appropriations Request (Copy)	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0007 (Dept. Budget & Appropriation Requests); No Inventory
7	74-0179	Time Records	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 10-0025 (Timekeeping Records); Final Disposition in 1-1-2003
8	76-0007	Time Owed & Allowed Report	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 14-E015 (Time Owed & Allowed Report; No Inventory
9	76-0016	Statement of Appropriations Balances	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0010 (Cash Management Administrative Records); No Inventory
10	76-0017	Purpose Budget Quarterly Detail Report	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0010 (Cash Management Administrative Records); No Inventory



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11	76-0014	Quarterly Expenditure Experience Report	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0010 (Cash Management Administrative Records); No Inventory
12	76-0015	Annual Experience for Expenditure by Object	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0010 (Cash Management Administrative Records); No Inventory
13	76-0018	Purpose Budget Accounts-Expenditures Per Unit	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0010 (Cash Management Administrative Records); No Inventory
14	76-0019	Receiving Report and Remittance Advice	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0016 (Accounts Payable); No Inventory
15	76-0020	Payment Certification	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0016 (Accounts Payable); No Inventory
16	76-0023	Monthly Stores Billing	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Longer Created; No Inventory
17	76-0024	Travel Expense Records	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0016 (Accounts Payable); No Inventory
18	76-0025	Requests to Transfer or Carry Over Funds	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0013 (Request to Transfer Funds);No Inventory
19	76-0026	Request for Duplicating	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0016 (Accounts Payable); No Inventory
20	76-0027	Sub departmental Requisition	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0003 (Interdepartmental Requisitions and Invoices); No Inventory
21	77-01113	Aldermans Records and Correspondence	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by Dept. 133 Schedules 18-0033 through 18-0039, 18-0042 approved 7/18/18; 502 boxes will be reassigned to appropriate schedule.
22	79-0015	Special Commission on CATV-Subject Files	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0042 (Subject Files- City Departments & Elected Officials Final disposition 12-8-2017
23	84-9087	Income Tax Roll 1912-1915	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	Transfer to 09-9010 (Tax Roll- Real Estate & Personal Property Files) Dept. 156 & retain in Archives per that schedule.





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Department Head  Jim Owczarski	Division Head  Jim Owczarski
Department Records Coordinator  Terry MacDonald	City Records Officer  Brad Houston
City Clerk (on behalf of the CIMC)	Date

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**Option 2 – Superseding a Schedule** This option is used when a schedule is replaced. The Schedule entered, should be the one that will ultimately close. In the Details section below, please indicate the Global or other record schedule to which the records are being transferred. The "Transfer To" schedule must already exist and cannot have an expired sunset date.

Schedule #		Series Title	Change Requested		Details
1	03-0040	Negatives of Elected City Officials	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; Final disposition 4-26-2010
2	73-0122	Standing Committee Meeting Minutes (Handwritten)	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; Final disposition 1-27-2011
3	94-0045	Schedule of Committee Meetings 1874-75	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; Final disposition 1-9-1996
4	95-0028	Administrative Review Appeals Audiotapes	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 08-0010 (Audio Tapes of Official Meetings); Final disposition 5-13-18
5	95-0167	Special Committee and Task Forces Correspondence	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0034 (Committee Files); Final disposition 9-26-14 to MPL
6	95-0168	Committee to Name Public Buildings and Streets	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0034 (Committee Files); No Inventory
7	95-9160	Standing Committee Meeting Minutes (Microfilm)	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 15-0007 (Minutes- City Boards, Commissions, Committees and Task Forces); No Inventory
8	95-M160	Standing Committee Meeting Minutes (Typed)	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 15-0007 (Minutes- City Boards, Commissions, Committees and Task Forces); Final Disposition 1-9-2007
9	95-M161	Common Council Special Committee and Task Forces Correspondence	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0034 (Committee Files); No Inventory
10	95-M162	Committee to Name Public Buildings and Streets	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0034 (Committee Files); No Inventory



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11	97-0041	Fax Cover Sheets for Council Services	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; No Inventory



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## Delete/Superseded Schedule Request Form

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Department Name: City Clerk/Document Services Section/City Records Center	Department Number: 156
Department Head Jim Owczarski	Division Head Brad Houston
Department Records Coordinator Terry MacDonald	City Records Officer Brad Houston
City Clerk (on behalf of the CIMC) Jim Owczarski	Date

**Option 1 – Deleting a Schedule** This option is used when the Department no longer creates or receives records for this series. In the Details section below, provide the date of final disposition for records in the series. Contact the City Records Center for inventory information.

**Option 2 – Superseding a Schedule** This option is used when a schedule is replaced. The Schedule entered, should be the one that will ultimately close. In the Details section below, please indicate the Global or other record schedule to which the records are being transferred. The "Transfer To" schedule must already exist and cannot have an expired sunset date.

Schedule #		Series Title	Change Requested		Details
1	00-0011	Town of Granville Resolutions	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 1-1-2017
2	04-0028	Central Services Division Operation Files	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Transfer to Global Schedule 18-0042 Subject Files- City Departments and Elected Officials; Move 23 boxes
3	10-E047	E-Vault Worm System Disks 1997-2010	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 6-24-2013
4	70-0044	Vital Records Deposit List	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	Obsolete; No Inventory
5	70-0045	Subject File	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Transfer to Global Schedule 18-0042 Subject Files- City Departments and Elected Officials
6	70-0048	Microfilm Aperture Card List	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 3-16-2000
7	70-0050	Payment Certification and Remittance Advice	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
8	70-0052	Inter-Dept SVC and MAT REQ & INV	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
9	70-9053	Holdings Index Cards- Current- Microfilm Copy	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 3-16-2000
10	74-0181	Memorandum Book	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
11	74-0182	Record Retention Schedule, Removal & Transfer List	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory



**Office of the Common Council - City Clerk  
City Records Center**

**Jim Owczarski**  
City Clerk  
jowcza@milwaukee.gov

**Bradley Houston**  
City Records Officer  
Bradley.Houston@milwaukee.gov

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12	76-M028	Camera Operators Certificate of Authenticity	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
13	77-9115	City Records Committee Minutes, 1956-Microfilm	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Transfer to Global Schedule 15-0007 Minutes, Boards, Commissions, Committee, Task Forces
14	77-M115	City Records Committee Minutes, 1956-	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Transfer to Global Schedule 15-0007 Minutes, Boards, Commissions, Committee, Task Forces
15	87-9001	Time Record C-251 All Departments- Microfilm	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	Final Disposition 12-31-2025; 50 rolls of microfilm
16	90-0088	Copy Service Reports	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
17	91-0086	Microfilm Processing Log Book	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 3-16-2000
18	91-0123	CRMS-Request Report- Monthly	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 1-12-1998
19	91-0124	CRMS-Returned Requests (On-Line)	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
20	91-0125	CRMS- Daily and Weekly Reports	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 1-29-2015
21	91-0126	CRMS Monthly Reports	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory
22	94-0001	Forms Control Records	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 9-1-2018
23	94-0002	City Records Committee Minutes, Correspondence	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Transfer to Global Schedule 15-0007 Minutes, Boards, Commissions, Committee, Task Forces
24	94-0004	City Records Committee Meeting Tape. Full Length	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Transfer to Global Schedule 15-0007 Minutes, Boards, Commissions, Committee, Task Forces
25	95-0079	Specifications for Town of Lake Structures	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 9-1-2018
26	95-0198	Contract Reference Files	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 95-0199 Vendor Information Files
27	97-0027	CRMS Design/Analysis Reports	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 6-30-2003
28	97-0107	Company Payment Files	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 11-10-1999
29	98-0001	Print Shop Form Inventory Records	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 10-5-2000
30	99-0101	MPR Cost Structure Records	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No Inventory; Final Disposition 12-25-2017



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Department Name: Employees' Retirement System	Department Number: 287
Department Head Bernard J. Allen	Division Head Bernard J. Allen
Department Records Coordinator Karen McElwee	City Records Officer Brad Houston
City Clerk (on behalf of the CIMC) Jim Owczarski	Date

**Option 1 – Deleting a Schedule** This option is used when the Department no longer creates or receives records for this series. In the Details section below, provide the date of final disposition for records in the series. Contact the City Records Center for inventory information.

**Option 2 – Superseding a Schedule** This option is used when a schedule is replaced. The Schedule entered, should be the one that will ultimately close. In the Details section below, please indicate the Global or other record schedule to which the records are being transferred. The "Transfer To" schedule must already exist and cannot have an expired sunset date.

Schedule #		Series Title	Change Requested		Details
1	97-0061	W2's/1099 Paper Copy	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0064 <u>1099-R Tax Reporting</u> ; move inventory; 6 boxes (1989-1991)
2	02-0013	Global Pension Settlement-Implementation Records	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; 14 boxes
3	69-0079	U.S. Information Return	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; No Inventory
4	73-0029	Employee Service Record as of Jan 1 1938	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; No Inventory
5	73-0305	Retirement Allowance Payroll 1938 to Date	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; Inventory 9.47 cu. ft.
6	97-M065	Members History	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0026 <u>Legacy Contribution Files</u> ; Transfer Inventory – 3 boxes
7	97-9065	Members History- Microfilm	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 18-0026 <u>Legacy Contribution Files</u> ; Transfer Inventory – 2 Rolls of Microfilm
8	74-0185	Report of Salary Deductions ERS-3A	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; No Inventory
9	02-M023	ERS Member Handbook	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by 02-0023 <u>ERS Member Handbook and Brochures</u> ; Transfer inventory to Milwaukee Legislative Reference Bureau
10	02-9023	ERS Member Handbook	<input checked="" type="checkbox"/> Option 1	<input type="checkbox"/> Option 2	No longer created; No Inventory.
11	73-0304	Vouchers: Expense, Journal & Retirement	<input type="checkbox"/> Option 1	<input checked="" type="checkbox"/> Option 2	Superseded by Global Schedule 02-0016 Accounts Payable-Transfer Inventory – 14 boxes