

STATE OF MICHIGAN
File Plan Template

This file plan was developed to be a guide for state employees. It is an example of a good organizational structure for recordkeeping. Individual employees/agencies will develop their own file plan to meet their specific needs. All of the records that are included in this file plan are covered by general schedules. General schedules are available online at <http://www.michigan.gov/recordsmanagement/>. Note: Record series numbers highlighted in gray have not been approved on Retention and Disposal Schedules yet.

Administrative—General Files

1005	Correspondence (General)	GS5.01
1006	Correspondence (Transitory)	GS5.00
1010	Forms/Templates	GS1
1011	Forms History Records	GS5.16
1015	Freedom of Information Act Requests	GS5.06
1020	Hazardous Materials Safety Data Sheets	GS5.13
1025	Mailing Labels and Contact Lists	GS5.33
1030	Periodic Activity Reports (Employee)	GS5.31
1035	Planners/Calendars	GS5.23
1040	Policies and Procedures (Development)	GS5.21
1041	Policies and Procedures (Final)	GS5.03
1050	Professional Organization Files	GS5.02B
1055	Project Files	GS5.28
1060	Software Manuals and User Information (Agency Produced)	GS5.38
1061	Software Manuals and User Information (Vendor Produced)	GS1
1065	Strategic Planning	GS5.32
1070	Subject Files (Transfer to Archives of Michigan)	GS5.02A
1071	Subject Files (To Be Destroyed)	GS5.02B
1075	Tracking Documents/Tools	GS1
1080	Visitor Logs/Registers	GS5.25

Financial/Accounting Files

1105	Accounts Receivable	GS6.06
1110	Audits	GS5.08
1115	Billing Summaries	GS6.12
1120	Budget Documentation	GS5.07
1125	Contracts	GS6.03
1130	Daily Travel Logs	GS6.17
1135	Deposit Transactions	GS6.04
1140	DMB Approvals for Payment	GS6.07
1145	Employee Travel Records	GS5.30
1150	Home to Place of Work Approvals (Agency Copy)	GS6.16
1155	Job Tickets (MAIN)	GS6.15
1160	Journal Vouchers	GS6.02
1165	Payments	GS6.01
1170	Procurement Card (Applications)	GS6.10
1171	Procurement Card (Billing Statements)	GS6.11
1172	Procurement Card (Logs)	GS6.13
1175	Purchase Orders	GS6.14
1180	Transaction Error Reports	GS6.09
1185	Warrants (Stopped, Cancelled, Undeliverable, Reissued)	GS6.08
1190	Year-end Closing Records	GS6.05

Human Resources/Personnel Files

1201	Discrimination Complaints	GS7.14
1205	Drug Testing	GS7.13
1210	Employee Files (Supervisors Copy)	GS1
1215	Employee Medical Records for Exposure (HR Office Copy)	GS7.07
1216	Employee Medical Records for Non-exposure (HR Office Copy)	GS7.16
1220	Employee Selection Files (Agency Copy)	GS7.02
1221	Employment Applications/Resumes (Agency Copy)	GS7.08
1225	Grievances	GS7.09
1230	MIOSHA 200 Logs	GS7.17
1235	Network User ID Requests (Authorized Requestor Copy)	GS7.20
1240	Organization Charts (Official Copy)	GS5.24
1245	Personal Services Requests	GS7.06
1250	Personnel Files (HR Office Copy)	GS7.01
1255	Position Files	GS7.03
1260	Reasonable Accommodation Requests (Agency Copy)	GS7.15A
1261	Reasonable Accommodation Requests (HR Office Copy)	GS7.15B
1265	Supplemental Employment	GS7.10
1270	Time and Attendance (Including Leave Requests)	GS7.04
1271	Time and Attendance (School/Volunteer Leave Requests)	GS7.19
1275	Training/Professional Development Received by Employees	GS5.36
1280	Unemployment Compensation	GS7.11
1285	Union Contract Negotiation	GS7.12
1290	Wage and Tax Listing	GS7.18
1295	Workers Disability Compensation	GS7.05

Legal Files

1310	Administrative Rule Promulgation	GS5.15
1320	Delegations of Authority	GS5.29
1330	Legislation	GS5.09
1340	Litigation	GS5.10
1350	Memoranda of Understanding	GS6.03

Outreach Files

1405	Audio-Visual Materials--Photos/Videos	GS5.19
1410	News Clippings	GS5.18
1415	Newsletters	GS5.20
1420	Press Releases	GS5.17
1425	Publications--Development	GS5.12
1430	Publications--Final	GS5.11
1435	Speeches/Presentations	GS5.37
1440	Training and Workshops (Curriculum Materials)	GS5.34
1445	Training and Workshops (Logistical Records)	GS5.35
1450	Web Content Development	GS5.12

Meeting Files

1510	Meeting Files (Open Meetings of Public Bodies)	GS5.04A
1520	Meeting Files (Closed Meeting Sessions of Public Bodies)	GS5.04B
1530	Meeting Files (Departmental Executive Staff/Advisory)	GS5.04C
1540	Meeting Files (Internal Agency Committees)	GS5.04D
1550	Meeting Files (Internal Agency Staff Meetings)	GS5.05