

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item #           | Record Series Title                     | Record Series Description   | Retention Period  | Approval Date |
|------------------|---|---|---|---------------|
| <b>Personnel</b> |   |   |   |               |
| 26.100A          | Personnel Files                         | These records document all human resources related transactions that occur during an employees' period of active employment, including hiring, promotion, demotion, transfer, layoff, performance, discipline, termination, etc. They may include, but may not be limited to, employment applications and resumes, job descriptions and classification history, clippings, correspondence, service record change forms, attendance, evaluations, investigations, COBRA, training records, blood borne pathogen training, contracts, disciplinary records, layoff notices, recall notices, apprenticeships, transcripts, tuition reimbursement, policy acknowledgements, property sign- out forms, certifications, current driver's licenses, driving records, police accident reports, exit interviews, and severance agreements. | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 7 years<br>THEN: Destroy | 8/16/2022     |
| 26.100B          | Personnel Files - Temporary Employees   | These records document employees who are hired for temporary, seasonal and student positions. They may include, but may not be limited to, documents listed in item #100A, as well as work permits and certificates of age for minors.  | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 7 years<br>THEN: Destroy | 8/16/2022     |
| 26.100C          | Personnel Files - Contractual Employees | These records document employees who are hired for contractual positions. They may include, but may not be limited to, 1099 forms, W-9 forms, verification of insurance, and copies of contracts.   | RETAIN UNTIL:<br>Contract expires<br>PLUS: 6 years<br>THEN: Destroy                 | 8/16/2022     |
| 26.101           | Employee Data                           | These records document all human resources related transactions that occur during an employees' period of active employment. They may include, but may not be limited to, data that is used to administer personnel and payroll functions, such as timekeeping, tenure, payroll, retirement, etc.   | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 7 years<br>THEN: Destroy | 8/16/2022     |
| 26.102           | Employment Verification Records         | These records document requests received from outside parties to verify that a person is employed by the local government.  | RETAIN UNTIL:<br>Date created<br>PLUS: 30 days<br>THEN: Destroy                     | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                            | Record Series Description   | Retention Period   | Approval Date |
|--------|--|---|--|---------------|
| 26.103 | Background Files                               | These records document that the local government conducted appropriate background checks on employees. They may include, but may not be limited to, release forms to conduct criminal history checks, fingerprint checks, and professional conduct checks, results of the checks, driving records, drug and alcohol tests, physical exam results, polygraph test results, and credit history reports.   | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 6 years<br>THEN: Destroy  | 8/16/2022     |
| 26.104 | Medical Files                                  | These records document private medical information for a specific employee, including disability accommodations. They may include, but may not be limited to, insurance forms, physician correspondence, tuberculosis tests, polygraph test results, off-work notices, Family Medical Leave Act forms and requests, long and short-term disability paperwork, drug and alcohol tests, physical exams, accident reports, and personal requests. Per 29 CFR 1910.1020(d), these records must be retained separately from personnel files (see item #100A).<br><i>NOTES: The medical records of employees who have worked for less than 1 year for the employer need not be retained beyond the term of employment, if they are provided to the employee upon the termination of employment. This series does not include the official copy of insurance claims, which are usually retained by the business or finance office.</i> | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 30 years<br>THEN: Destroy | 8/16/2022     |
| 26.105 | Employee Test Result Records                   | These records document the results of tests taken by employees when they complete professional development, continuing education, licensing and/or certification training that is required for employment. Other training records are kept in the employee file (see item #100).  | RETAIN UNTIL:<br>Date created<br>PLUS: 6 years<br>THEN: Destroy                      | 8/16/2022     |
| 26.106 | Commercial Drivers License Test Result Records | These records document which employees hold valid commercial drivers licenses (CDL). They may include, but may not be limited to, CDL test results, test results for alcohol or controlled substances, test refusals, driver evaluations and referrals, calibration documentation, test administration documents, calendar year summaries, alcohol misuse documents, and information about employee participation in controlled substances use prevention programs. [49CFR382.401.]   | RETAIN UNTIL:<br>Date created<br>PLUS: 5 years<br>THEN: Destroy                      | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                          | Record Series Description   | Retention Period  | Approval Date |
|--------|--|---|---|---------------|
| 26.107 | I-9 Files                                    | These records document verification by employers of identity and immigration status of all new employees. They may include, but may not be limited to, employment eligibility verification forms, and supporting documentation. 8 CFR 274a.2 (1998) requires that employers maintain signed copies of I-9 forms.  | RETAIN UNTIL:<br>Date of hire<br>PLUS: 3 years<br>OR<br>RETAIN UNTIL:<br>Termination<br>PLUS: 1 year<br>(whichever is later)<br>THEN: Destroy | 8/16/2022     |
| 26.108 | Policy and Procedure Records                 | These records document employee policies and procedures that are adopted by the local government. Drafts and other development documents should be retained until the final document is adopted.  | RETAIN UNTIL:<br>Superseded by new versions<br>PLUS: 6 years<br>THEN: Destroy   | 8/16/2022     |
| 26.109 | Grievance and Unfair Labor Practices Records | These records document grievances and charges filed against local governments and the resolution of the grievance. They may include, but may not be limited to, written grievances, pre-hearing reports, grievance forms, correspondence, summary sheets, employee history information, legal documents, and decisions.   | RETAIN UNTIL:<br>Contract that the grievance is related to expires<br>THEN: Destroy   | 8/16/2022     |
| 26.110 | Complaint Records                            | These records document the filing and investigation of a complaint. Complaints may relate to affirmative action, sexual harassment, labor practices, disability issues, discrimination, or other issues. They may include, but may not be limited to, completed questionnaires from management, staff, and/or witnesses to the alleged violation, correspondence, documents detailing the complaint, investigatory records, Civil Rights or Equal Employment Opportunity Commission documentation, and litigation documentation from court systems. | RETAIN UNTIL:<br>Complaint is dismissed or resolved<br>PLUS: 7 years<br>THEN: Destroy   | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                    | Record Series Description  | Retention Period  | Approval Date |
|--------|--|--|---|---------------|
| 26.111 | Investigation Records                  | These records document investigations into incidents or issues that do not lead to disciplinary action of an employee. Disciplinary records are maintained in the employee's personnel file. They may include, but may not be limited to, correspondence, incident reports, and supporting documentation.  | RETAIN UNTIL:<br>Completion of the investigation<br>THEN: Destroy, if disciplinary action is <u>not</u> taken (MCL 423.509)<br>OR PLUS: 4 years, only if disciplinary action is taken - a disciplinary report will be retained in the employee's personnel file (see item #100A)<br>THEN: Destroy | 8/16/2022     |
| 26.112 | Benefit Plan Records                   | These records document the terms of benefit plans that are available to employees. They may include, but may not be limited to, plan documents, plan descriptions, and reports.  | RETAIN UNTIL:<br>Superseded by a new version<br>PLUS: 6 years<br>THEN: Destroy  | 8/16/2022     |
| 26.113 | Employee Injury Records - Exposure     | These records document accidents or injuries involving exposure to toxic substances or blood-borne pathogens. They may include, but may not be limited to, incident reports, medical reports, responses by supervisors and management, requests for medical leave, insurance forms, applications for continuation of insurance, and supporting medical documentation. [29 CFR 1910.1020] These files are maintained separately from the personnel file.  | RETAIN UNTIL:<br>Date created<br>PLUS: 30 years<br>THEN: Destroy  | 8/16/2022     |
| 26.114 | Employee Injury Records - Non-exposure | These records document accidents or injuries involving an employee. They may include, but may not be limited to, incident reports, responses by supervisors and management, requests for medical leave, insurance forms, and applications for continuation of insurance. These records are maintained separately from the personnel file. OSHA requires that any information pertaining to a job-related illness and injury be kept on file for five years after the end of the fiscal year in which the event occurred. | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 5 years<br>THEN: Destroy   | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                        | Record Series Description   | Retention Period   | Approval Date |
|--------|--|---|--|---------------|
| 26.115 | Employee Injury Records - OSHA 300 Log     | These records document all employee injuries within a calendar year. They may include, but may not be limited to, logs and supporting documentation. In accordance with 9 CFR 1904.33, these records shall be retained for 5 years following the calendar year that they cover. | RETAIN UNTIL:<br>Calendar year ends<br>PLUS: 5 years<br>THEN: Destroy          | 8/16/2022     |
| 26.116 | Job Classification and Description Records | These records document job classification systems and all existing positions. They may include, but may not be limited to, summaries of job responsibilities, functions, applicant requirements, and salary and benefit classifications.  | RETAIN UNTIL:<br>Superseded by a new version<br>PLUS: 6 years<br>THEN: Destroy | 8/16/2022     |
| 26.117 | Salary Study Records                       | These records document the analysis of employee salaries to ensure fair compensation. They may include, but may not be limited to, research, surveys, and reports.  | RETAIN UNTIL: No longer of reference value<br>THEN: Destroy                    | 8/16/2022     |
| 26.118 | Position Re-classification Records         | These records document requests to have a position re- classified. They may include, but may not be limited to, requests, copies of existing and proposed job descriptions, decisions affecting the request, and supporting documentation.                                      | RETAIN UNTIL:<br>Date created<br>PLUS: 6 years<br>THEN: Destroy                | 8/16/2022     |
| 26.119 | Job Advertisement and Posting Records      | These records document the advertising of available positions that the local government intends to fill, both internally and externally. They may include, but may not be limited to, notices, and published advertisements.  | RETAIN UNTIL:<br>Date created<br>PLUS: 1 year<br>THEN: Destroy                 | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                   | Record Series Description  | Retention Period   | Approval Date |
|--------|---------------------------------------|--|--|---------------|
| 26.120 | Job Application Records               | These records document applicants for positions who were not hired, regardless of whether they were interviewed (this includes unsolicited applications, unless the local government has a written policy prohibiting the acceptance of unsolicited applications). They may include, but may not be limited to, resumes, letters of interest, applications, regret letters, qualification exam scores, and supporting documentation. | RETAIN UNTIL:<br>Decision is made not to hire the individual<br>PLUS: 1 year<br>THEN: Destroy, if the application is unsolicited (no position is currently available), or if the person is determined to be ineligible for the position to which they applied<br>OR<br>RETAIN UNTIL:<br>Position is filled<br>PLUS: 2 years<br>THEN: Destroy, if the person was considered for a <del>position</del> | 8/16/2022     |
| 26.121 | Selection Files                       | These records document the appointment and selection of employees. They may include, but may not be limited to, employment lists, transfer lists, selection criteria, evaluations of candidates, position descriptions, applications, interview questions, reference checks, rating forms, and appointment recommendations or notifications.   | RETAIN UNTIL:<br>Position if filled<br>PLUS: 2 years<br>THEN: Destroy  | 8/16/2022     |
| 26.122 | Job Qualification Exam Records        | These records document testing of potential employees' qualifications for employment. They may include, but may not be limited to, master exams and master answer sheets, and test development documentation (if applicable).  | RETAIN UNTIL:<br>Superseded by a new version<br>PLUS: 6 years<br>THEN: Destroy   | 8/16/2022     |
| 26.123 | Emergency Contact Records             | These records document which the people the employee wants to be contacted if they are involved in an emergency situation.   | RETAIN UNTIL:<br>Superseded by new information<br>THEN: Destroy  | 8/16/2022     |
| 26.124 | Workers Disability Compensation Files | These records document any claims made for workers disability compensation benefits. They may include, but may not be limited to, incident or injury reports submitted by the employee (original is sent to the insurer), and reports from the occupational health center. Litigation records is kept separately.  | RETAIN UNTIL:<br>Claim is settled<br>PLUS: 7 years<br>THEN: Destroy  | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                     | Record Series Description  | Retention Period  | Approval Date |
|--------|---|--|---|---------------|
| 26.125 | Worker Disability Compensation Reports  | These records document reports that are received from disability insurance providers about the amount of benefits that were paid from the policy.  | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy           | 8/16/2022     |
| 26.126 | Labor Agreement and Negotiation Records | These records document labor negotiations and resulting contracts with individual employees and employee groups. They may include, but may not be limited to, salary and benefit schedules, ground rules proposals and counter proposals, secondary negotiations, meeting minutes, agreements, and final contracts. Separate files are maintained for each employee negotiating group. <i>Note: select records may need to be kept longer, if they are needed to document retirement benefits that an employee is entitled to.</i> | RETAIN UNTIL:<br>Expiration date<br>PLUS: 10 years<br>THEN: Destroy           | 8/16/2022     |
| 26.127 | Union Files                             | These records document each union that represents employees. They may include, but may not be limited to, correspondence, and dues information.  | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy           | 8/16/2022     |
| 26.128 | Seniority Records                       | These records document the seniority status of union employees. They may include, but may not be limited to, lists and documents that are sent to union presidents.  | RETAIN UNTIL:<br>Superseded by a new version<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |
| 26.129 | Affirmative Action Plan Records         | These records document the local government's plans to comply with affirmative action requirements. They may include, but may not be limited to, plans, supporting documentation, analyses, raw data, tests given to employees, and validation studies.  | RETAIN UNTIL:<br>Plan expires<br>PLUS: 2 years<br>THEN: Destroy               | 8/16/2022     |
| 26.130 | Adverse Impact Determination Records    | These records document audits or investigations of potential civil rights violations that are conducted by state or federal agencies when an adverse impact upon employees is determined. They include, but may not be limited to, determinations, and documentation that the cause of the adverse impact was eliminated.  | RETAIN UNTIL:<br>Date created<br>PLUS: 2 years<br>THEN: Destroy               | 8/16/2022     |
| 26.131 | Organization Chart Records              | These records document the organizational structure of the local government. They may include, but may not be limited to, organization charts, mission statements, and supporting documentation. <i>Note: these records may continue to have reference value after they are superseded</i>   | RETAIN UNTIL:<br>Superseded by a new version<br>THEN: Destroy                 | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item #      | Record Series Title                  | Record Series Description  | Retention Period   | Approval Date |
|-------------|--------------------------------------|--|--|---------------|
| 26.132      | Employee Directory Records           | These records document the personal or office contact information for employees. <i>Note: these records may continue to have reference value after they are superseded</i>   | RETAIN UNTIL:<br>Superseded new information<br>THEN: Destroy   | 8/16/2022     |
| 26.133      | Government Reports                   | These records document reports that are prepared by the local government to document its activities and actions. They may include, but may not be limited to, equal employment opportunity reports, veteran employment reports, and census of government employment reports.   | RETAIN UNTIL:<br>Date created<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |
| 26.134      | COVID-19 Health Surveillance Records | These records document attestations that a person is healthy enough to safely enter a building where a government office is located, or that a government employee is healthy enough to work, in compliance with MIOSHA COVID-19 Emergency Rules. They may include, but may not be limited to, data collected during network login, data collected as someone enters a building, and logs. | RETAIN UNTIL:<br>Date created<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |
| 26.135      | COVID-19 Notification Records        | These records document notifications about potential exposure to COVID-19 in compliance with MIOSHA COVID- 19 Emergency Rules. They may include, but may not be limited to, notification documents, notification distribution lists, and supplemental documentation.   | RETAIN UNTIL:<br>Date created<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |
| 26.136      | COVID-19 Training Records            | These records document training provided to employees about COVID-19 and infection control practices in compliance with MIOSHA COVID-19 Emergency Rules. They may include, but may not be limited to, training materials, attendance documentation, and supplemental documents.  | RETAIN UNTIL:<br>Date created<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |
| <i>Note</i> | <i>Contract Records</i>              | <i>The official copies of contracts are generally retained by the Clerk and are listed on the Clerk's Retention and Disposal Schedule (see General Schedules #6, 24, 25). Their minimum retention period is until the contract expires, plus 6 years, then destroy.</i>  |  |               |

**Payroll Records**

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item #  | Record Series Title  | Record Series Description  | Retention Period   | Approval Date |
|---------|--|--|--|---------------|
| 26.200A | Employee Files—Employees Enrolled in a Pension Plan                  | These records document activities that affect payroll for each employee who is enrolled in a pension plan (such as the Municipal Employees Retirement System or a locally operated plan). They may include, but may not be limited to, W-4, hiring authorization, requisitions, pay increase/change of status notices, contract calculations, long-term disability, retirement purchases, current enrollment for benefits (including health, life, disability, dental, vision and supplemental insurance), credit union deposits, flexible spending accounts, investments in tax deferred accounts (such as 403B, 401K, 457, etc.), employee/employer deferral elections, employee/employer loan agreements, contribution limit testing, supporting documentation for garnishments, levies and deductions, tax deferred payment agreements, retirement beneficiary forms, final salary affidavit, and electronic funds transfer applications.  | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 50 years<br>OR RETAIN UNTIL:<br>Individual retires<br>PLUS: 6 years<br><i>(whichever is sooner)</i><br>THEN: Destroy<br>THEN: | 8/16/2022     |
| 26.200B | Employee Files—Employees Enrolled in Defined Contribution Plans Only | These records document activities that affect payroll for each employee who is enrolled in a defined contribution plan only and does not receive a pension. They may include, but may not be limited to, W-4, hiring authorization, requisitions, pay increase/change of status notices, contract calculations, long-term disability, current enrollment for health benefits, credit union deposits, flexible spending accounts, investments in tax deferred accounts (such as 403B, 401K, 457, etc.), employee/employer deferral elections, employee/employer loan agreements, contribution limit testing, supporting documentation for garnishments, levies and deductions, tax deferred payment agreements, beneficiary forms, final salary affidavit, and electronic funds transfer applications. <i>Note: if an employee's abandoned wages are reported and remitted to the Michigan Department of Treasury, the employee's name and last known address need to be retained by the employer for 10 years.</i> | RETAIN UNTIL:<br>Individual is no longer employed<br>PLUS: 6 years<br>THEN: Destroy  | 8/16/2022     |
| 26.201  | Salary and Benefit Schedule Records                                  | These records document the rate of pay for employees and define the benefits that are offered.   | RETAIN UNTIL:<br>Date created<br>PLUS: 6 years<br>THEN: Destroy  | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title         | Record Series Description   | Retention Period   | Approval Date |
|--------|-----------------------------|---|--|---------------|
| 26.202 | Payroll Register Records    | <p>These records document reports that are produced to document payroll activities. They may include, but may not be limited to, employee names, social security numbers, employee identification numbers, gross wages, deductions, net pay, current pay period, year to date earnings, etc.</p> <p><i>Note: if none of the local government's employees that are listed on the register are enrolled in a pension plan, these records can be retained for FY+7, in accordance with item #203.</i></p>  | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 50 years<br>THEN: Destroy | 8/16/2022     |
| 26.203 | Payroll Reports             | <p>These records document reports that are generated for each pay cycle to verify the accuracy of the payroll. They may include, but may not be limited to, payroll summaries, pay journals, check registers, account distributions, payroll liabilities, payroll transactions, payroll account creation reports, gross pay balance, and deduction registers.</p>   | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy  | 8/16/2022     |
| 26.204 | State Retirement Reports    | <p>These records document employee and employer contributions into state retirement plans. They may include, but may not be limited to, reports containing the payroll date, employee name, social security number, employee identification number, retirement hours, wage code, classification, retirement wages, withholding for the member investment plan, district contribution, rate of pay, contract dates, and number of payments per year.</p>   | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy  | 8/16/2022     |
| 26.205 | Time and Attendance Records | <p>These records document the hours worked and leave time used by each employee during each pay cycle, and they are used to support payroll activity. They may include, but may not be limited to, time sheets or cards, time keeping data, time and attendance reports, and pay statements containing the hours worked by the employee, the gross wages paid, the pay period for which payment is being made, itemized deductions, itemized fringe benefits, wage assignments, and garnishments and levies. Note: if the local government's final average compensation calculation is longer than 3 years, it will need to retain these records for at least that calculation timeframe.</p> | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 5 years<br>THEN: Destroy  | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item #   | Record Series Title                      | Record Series Description  | Retention Period  | Approval Date |
|--|--|--|---|---------------|
| 26.206   | Federal and State Tax Deduction Records  | These records document payment of financial liabilities for monies withheld from employee wages. They may include, but may not be limited to, quarterly form 941 reporting to the Internal Revenue Service for taxes withheld, quarterly transfer of state withholding and sales taxes, Medicaid wage detail, and quarterly reports.   | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy                                       | 8/16/2022     |
| 26.207   | W-2 and W-3 Forms                        | These records document the annual gross wages, federal, state, Medicare, Social Security, and local taxes withheld for the purpose of reporting income taxes.  | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy                                       | 8/16/2022     |
| 26.208   | Unemployment Insurance Reporting Records | These records document unemployment insurance payments made by contributing and reimbursing employers. They may include, but may not be limited to, reports identifying the taxes paid and benefits charged to the employer's "account."   | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 7 years<br>THEN: Destroy                                       | 8/16/2022     |
| 26.209   | Unemployment Claim Records               | These records document people who are claiming unemployment benefits from the local government via the Unemployment Insurance Agency. They are used to verify that the people are entitled to these benefits, and to resolve discrepancies. They may include, but may not be limited to, correspondence, and appeals.  | RETAIN UNTIL:<br>Fiscal year ends<br>PLUS: 1 year<br>THEN: Destroy  | 8/16/2022     |
| 26.210   | Wage Differential Reports                | These records document analysis of the wage differential between sexes. They may including, but may not be limited to, reports, and substantiating documents.  | RETAIN UNTIL:<br>Date created<br>PLUS: 2 years<br>THEN: Destroy   | 8/16/2022     |
| <b>Human Resources Department - General Administrative Records</b> |  |  |   |               |
| 26.300   | Subject Files                            | These records document various topics, issues, projects, or activities that an agency or employee is involved in. They may include, but may not be limited to, topical reference files about issues, strategic planning files for the agency or specific initiatives, special project files, budget documents, audit documents, and development files for policies, press releases, publications, and forms. Document types may include topical correspondence, memoranda, reports, research, articles, meeting notes, and related background materials. | RETAIN UNTIL:<br>Topic no longer of interest for ongoing administration<br>PLUS: 5 years<br>THEN: Destroy | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                               | Record Series Description  | Retention Period  | Approval Date |
|--------|---|--|---|---------------|
| 26.301 | General Correspondence Files                      | These records document correspondence received or sent that is not pertinent to an active project, matter, or case being handled by the agency. They may include, but may not be limited to, requests for information that do require administrative action, a policy decision, special compilation of research, analysis, or referral correspondence. This series also includes correspondence indexing and tracking tools. | RETAIN UNTIL:<br>Date created<br>PLUS: 2 years<br>THEN: Destroy                         | 8/16/2022     |
| 26.302 | Transitory Records                                | These records document agency activities that have temporary value and do not need to be retained once their intended purpose has been fulfilled. They may include, but may not be limited to, routine requests for information that require no: administrative action, policy decision, special compilation of research; requests or matters that are addressed by creating other records; and reminders.                   | RETAIN UNTIL:<br>Activity is completed<br>THEN: Destroy                                 | 8/16/2022     |
| 26.303 | Freedom of Information Act (FOIA) Request Records | These records document requests for information and public records maintained by state agencies. They may include requests for information, correspondence, a copy of the information released, and billing documentation.   | RETAIN UNTIL:<br>Response is sent or request is denied<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |
| 26.304 | Contact List and Directory Records                | These records document contact information for individuals or organizations with whom the agency communicates. They may be used to generate labels or other documents. They may contain name, email address, mailing address, phone numbers and other contact information.   | RETAIN UNTIL:<br>Updated or obsolete<br>THEN: Destroy                                   | 8/16/2022     |
| 26.305 | Planner and Calendar Records                      | These records document an individual employee's work-related meetings, assignments, and tasks. They may include, but may not be limited to, appointments, meetings, calendars, and planners.   | RETAIN UNTIL:<br>Event date<br>PLUS: 2 years<br>THEN: Destroy                           | 8/16/2022     |
| 26.306 | Staff and Project Meeting Records                 | These records document staff meetings, meetings with other government agencies, etc. They may include, but may not be limited to, meeting minutes, agendas, and distribution materials. Meeting records may also be retained in subject files (see item #300), if they relate to a specific topic.   | RETAIN UNTIL:<br>Date created<br>PLUS: 2 years<br>THEN: Destroy                         | 8/16/2022     |
| 26.307 | Annual Reports                                    | These records document the department's activities throughout a year. They may include, but may not be limited to, narrative and statistical information.  | RETAIN UNTIL:<br>Date created<br>PLUS: 10 years<br>THEN: Destroy                        | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title                  | Record Series Description  | Retention Period  | Approval Date |
|--------|--------------------------------------|--|---|---------------|
| 26.308 | Grant Records - Awarded              | These records document grants received from federal, state, and private agencies that are administered by the business or finance office. They may include, but may not be limited to, applications, budgets, worksheets, adjustments, plans, rules and regulations, award letters, committee records, staffing sheets with account numbers, grant evaluation and monitoring reports, audits, and periodic progress reports. | RETAIN UNTIL:<br>Grant is closed out, unless otherwise specified by the granting agency for auditing purposes.<br>Final reports and products of the grant may be kept longer for use and reference purposes<br>PLUS: 7 years<br>THEN: Destroy | 8/16/2022     |
| 26.309 | Grant Application Records - Denied   | These records document grants that were applied for, but were not received. They may have reference value for preparing future grant applications. They may include, but may not be limited to, application forms, budget proposals, letters of support, narrative plans, and supporting documentation.  | RETAIN UNTIL:<br>Grant is denied<br>PLUS: 1 year<br>THEN: Destroy   | 8/16/2022     |
| 26.310 | Departmental Budget Planning Records | These records document budget planning and tracking activities for the human resources department. They may include, but may not be limited to, budget requests, statistics, budget amendments, budget summaries, and balance sheets.  | RETAIN UNTIL:<br>Date created<br>PLUS: 5 years<br>THEN: Destroy   | 8/16/2022     |
| 26.311 | Publication Records                  | These records document information that is published by the human resources department. They may include, but may not be limited to, press releases, brochures, newsletters, and other items.  | RETAIN UNTIL: No longer of reference value<br>THEN: Destroy   | 8/16/2022     |
| 26.312 | Memorabilia                          | These records document events and activities of the human resources department. They may include, but may not be limited to, photographs, news clippings, certificates, and awards.  | RETAIN UNTIL: No longer of reference value<br>THEN: Destroy   | 8/16/2022     |
| 26.313 | Audio-Visual Materials               | These records document general program activities, facilities, people, etc. They may include, but may not be limited to, photographs, video recordings, audio recordings, and slides, etc. in analog and digital formats.  | RETAIN UNTIL: No longer of reference value<br>THEN: Destroy   | 8/16/2022     |
| 26.314 | Visitor Logs and Register Records    | These records document who visited the office. They identify the visitor's name, date and time of the visit, etc. They may be used for security purposes or to track visitor statistics.   | RETAIN UNTIL:<br>Date created<br>PLUS: 2 years<br>THEN: Destroy   | 8/16/2022     |

**STATE OF MICHIGAN**  
**Records Management Services**  
**General Schedule #26 - Human Resources**

| Item # | Record Series Title             | Record Series Description  | Retention Period   | Approval Date |
|--------|---------------------------------|--|--|---------------|
| 26.315 | Employee In and Out Log Records | These records document the time and date when staff arrive and depart throughout each day. | RETAIN UNTIL:<br>Date created<br>PLUS: 1 year<br>THEN: Destroy | 8/16/2022     |