

State of Michigan



Records Management Services

Records Retention and Disposal Schedule Local Government Record Inventory Form Instructions and Example

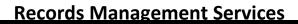
Local governments must prepare and submit a <u>Record Inventory form</u> for the Retention and Disposal Schedule (instructions below, example on page #2).

- 1. Double-click on the page header, where the *agency name* field is located. Provide the name of the agency submitting the schedule. For example, **Agency Name**: Michigan County Clerk's Office.
- 2. Double-click on the table in the page body to enter the record inventory data, per the instructions below. List all records maintained by the agency that are not currently included on an applicable general schedule or agency-specific schedule. *Delete unnecessary rows. Please do not use colored fonts.*
- 3. Fill out the Local Government Contact Information form.
- 4. Send the Record Inventory and Local Government Contact Information forms to DTMB Records Management Services via email at recordscenter@michigan.gov for review.
- 5. When the draft is ready for approval, DTMB Records Management Services will use the State of Michigan eSignature tool to send the schedule to the agency representative for signing. The agency contact person will be notified when the schedule is approved.

Item #	Record Series Title	Record Series Description	Retention Period
Agency should assign a unique number to each record series listed on the schedule for reference purposes.	A record series is a group of records that are maintained together to document a business process or activity. Provide a title for the record series.	Describe why these records are created and what activity they support. List the types of documents typically found in the files, or the major data fields in the database.	Identify how long the records need to be kept. Format the retention period as follows: RETAIN UNTIL: [What event or activity triggers the clock on the retention period?] PLUS: [How long are the records needed after the trigger? Days, months years?] THEN: [Are the records destroyed or transferred to the Archives of Michigan at the end of the retention period?]



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EXAMPLE

The following records are listed below as an example of how the schedule should look.

Agency Name: Michigan County - Clerk's Office

Item#	Record Series Title	Record Series Description	Retention Period
103	Freedom of Information Act	These records document any requests for information or public records. They may	RETAIN UNTIL: Request is closed
	(FOIA) Requests	include, but may not be limited to,	PLUS: 1 year
		requests for information,	THEN: Destroy
		correspondence, a copy of the	
		information released, and billing information.	
105	Planners/Calendars	These records document an individual employee's work-related meetings,	RETAIN UNTIL: Event takes place
		assignments, and tasks. They may be	PLUS: 2 years
		electronic or physical planners and	THEN: Destroy
		calendars. Individual employees are	
		responsible for retaining their	
		planners/calendars for the duration of	
		this retention period.	
111	Policies, Procedures	These records document the policies	RETAIN UNTIL:
	and Directives	procedures of the department. They also	Replaced by a
		include administrative manuals.	new version
			PLUS: 5 years
121	Visita v Laga /Dagistava	These resemble describes who wisited a	THEN: Destroy
121	Visitor Logs/Registers	These records document who visited a particular office. They may be used for	RETAIN UNTIL: Date created
		security purposes or to track visitor	PLUS: 2 years
		statistics. They may include, but may not	THEN: Destroy
		be limited to, the visitor's name, and the	TITLIN. Describy
		date and time of the visit.	
		date and time of the visit.	