

**Records Retention and Disposal Schedule – Local Government
Record Inventory**

Michigan Department of Technology, Management and Budget
Records Management Services

Agency Name:

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

