

Universities of Wisconsin Galleries, Libraries, Archives, and Museums Record Schedules

Schedule Number	Schedule Title	Description	Retention Event (EVT)	Retention Time	Disposition	PII	Confidential	Sunset Date	Superseded
W0000309	Library Donor Files	Records documenting the donation of materials to a circulating library collection. They may include a signed deed of gift, any correspondence pertaining to the donation, a list of the contents of the collection, and donor contact information. This series may also include records regarding the withdrawal or removal of any library materials donated or purchased under special conditions. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date item is donated	10 years	Destroy Confidential	Yes	No	2034	UWLIB111 - Deaccession Records (Library) UWLIB112 - Library Donor Files
W0000310	Library Item Circulation Records	Commonly called circulation records, these records document the borrowing of circulating library materials by qualified patrons. The series links the item's bibliographic information to a patron during the loan period. Information may include, but is not limited to, the time-period of the loan, renewals, and fines. This series may also include communication regarding circulating items. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date item returned	6 months	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB122 - Circulation Records UWLIB127 - Search/Hold/Retrieval Requests
W0000311	Library User Agreements	Records related to agreements signed by library patrons regarding the use of library resources and facilities.	Date agreement expires	2 weeks	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB126 - Library User Agreements
W0000312	Library Resolved Search Lists	Cumulative list of resolved title searches for each academic year, may include the date, bibliographic information, and how the search was resolved. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	End of academic year	1 year	Destroy	No	No	2034	UWLIB128 - Resolved Search Lists
W0000313	Library Stack Management Records	Records created in the process of managing library books and multi-media stacks. Records may include measurements of free space, shelf reading materials, shelving accuracy statistics, and other records created in the shelving and shifting of collections. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date superseded	1 day	Destroy	No	No	2034	UWLIB129 - Stack Management Records
W0000314	Library Interlending Request Records	Records that track the request, shipping, and return of library items with other libraries. Records may include, but are not limited to, requests for materials, receipts, and patron signed forms. Records indicate when and where the library item was sent, the due date, and when it was returned. Some campuses use this information for long-term historical analysis. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date request completed or historical analysis completed, whichever is longer	1 year	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB130 - Library Interlending Request Records

W0000315	Library Reference Questions	Records of written exchanges between patrons and library staff regarding ready-reference or resource-based questions made via email, text, chat, or other forms of written communications. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Fiscal year	1 year	Destroy Confidential	Yes	No	2034	UWL138 - Reference Questions and Tabulations (Library)
W0000316	Library Instructional Materials	Materials created for patron or campus use, explaining the use of the catalog, databases and other bibliographic tools. Records may include LibGuides and similar resources. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date Superseded	1 day	Destroy	No	No	2034	UWL140 - Library Instructional Materials
W0000317	Library Patron Record	Records created within the library automated system that indicate name, address, major, class standing, etc. of library patrons. The system allows for patrons of different user types including students, staff, and community members. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date of last attendance, last day of employment, or expiration of user agreement	3 years	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWL145 - Patron Record
W0000318	Library Bibliographic Record	Records of all cataloged library materials considered part of the library collection including books, media, archival, and special collection materials. Records include descriptive metadata for each item. Some campuses use this information for long-term historical analysis. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date last copy withdrawn or historical analysis completed, whichever is longer	1 day	Destroy	No	No	2034	UWL146 - Library Bibliographic Record
W0000319	Library Circulation Historical Usage Records	These records document the use of library materials over the lifetime of an item. The records include transaction and bibliographic information of the items that were circulated but are no longer linked to patron information to protect the identity of the borrower. Some campuses use this information for long-term historical analysis to determine when items should be removed from the collection. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date item withdrawn or historical analysis completed, whichever is longer	1 week	Destroy	No	No	2034	UWL147 - Analytics Records
W0000320	Library Patron Historical Circulation Records	Records that document the borrowing of circulating library materials by qualified patrons who have opted-in to preserve their historical library use. Patrons may include students, staff or community members. Records for Special Collections, Archives, Museums and Galleries are covered under different schedules.	Date of last attendance, last day of employment, or expiration of user agreement	3 years	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	NEW
W0000321	Special Collections, Museums, and Galleries Management Records	Records pertaining to the acquisition, history, value, care and movement of special collections, museums, and galleries materials. This series may include, but is not limited to, accession records, catalog records, deeds of gifts, donor files, processing records, research materials, object images, condition reports, appraisals, insurance records, and historical information. Deaccession records are also kept to preserve provenance information. Records for Libraries are covered under different schedules.			Permanent	Yes	No	2034	UWL113 - Object Collection Management UWL120 - Donor Files UWL121 - Accession, Deaccession and Processing Records (Special Collections)

W0000322	Special Collections and Museums Researcher Registration Records	Registration records are created to authenticate a patron on an annual or daily basis in preparation for research in special collections and museums. These records are used for security purposes, statistical analysis, and to acquaint patrons with department rules and regulations. Patrons may be of different user types including students, staff, and community members. Records for Libraries are covered under different schedules.	Date of last attendance, last day of employment, or expiration of user agreement	10 years	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB114 - Annual Researcher Registration Records UWLIB115 - Daily Researcher Registration Records
W0000323	Special Collections Circulation Records	Records that document the borrowing of special collections materials by qualified patrons and would include the name of the individual, date of use, reason for use, materials used by patron and bibliographic information regarding the collection. The series links the item's bibliographic information to a patron and records items like the time period of the loan, renewals, and fines. Records for Libraries are covered under different schedules.	Date item returned	10 years	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB117 - Circulation Records (Special Collections)
W0000324	Special Collections Interlending Records	Records created to process shipments of special collections materials through the Area Research Center network. Records may include patron information, shipping lists and shipment confirmation statements. Records for Libraries are covered under different schedules.	Fiscal Year	10 years	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB118 - Interlending Records (Special Collections)
W0000325	Special Collections and Museums Reference/Research Requests and Responses	Records documenting reference and research requests and responses by special collections and museum staff. Records for Libraries are covered under different schedules.	Fiscal Year	5 years	Destroy Confidential	Yes	Yes Patron records protected per Wis. Stat §43.30 (1)(m), (2)	2034	UWLIB119 - Reference/Research Requests and Responses
W0000326	Special Collections, Museums, and Galleries Conservation Treatment Records	Records documenting any repair or conservation treatment performed on art objects, artifacts, and materials in special collections, museums, and galleries. These records may include, but are not limited to, a description of the action, the person or company performing such work, and related documentation, as well as vital information regarding the provenance of university-owned museum objects, special collections and archival materials. Records for Libraries are covered under different schedules.			Permanent	Yes	No	2034	UWLIB148 - Conservation Treatment Records
W0000327	Library, Special Collections, Museums, and Galleries Special Event Loan Records	Records documenting the borrowing or loan of collection materials typically for exhibitions by libraries, special collections, museums, and galleries. Records include, but are not limited to, brochures, insurance certifications, loan forms, manuscript appraisals, condition and facility reports, and related correspondence.	Date materials returned	5 years	Destroy	No	No	2034	UWLIB149 - Museum & Gallery Loan Records - Short Term
W0000328	Library, Special Collections, Museums, and Galleries Exhibition Records	Materials pertaining to the design, execution, and installation of exhibitions. Records may include correspondence, memoranda, concepts, scripts, label texts, clippings, installation photographs, floor plans, drawings, graphics, checklists, schedules, notes, and related materials.	Date exhibit closed	5 years	Destroy	No	No	2034	UWLIB150 - Exhibition Records - Short Term