

## Retention Schedule for Parish Files — Appendix 801B

### 1. Administrative

File Title	Active Phase	Retention Information	Disposition Instructions
Annual Reports	5 years	Permanent Retention	Transfer to Parish Archives
Appointment Calendars	2 years	Destroy	Shred
Bulletins	1 year	Permanent Retention	Transfer to Parish Archives
Contracts	As long as current	Permanent Retention	Transfer to Parish Archives
Correspondence	5 years	Selective Retention	Transfer correspondence which documents an action or activity to Parish Archives.
Decree of establishment	5 years	Permanent Retention	Transfer to Parish Archives
Archdiocesan Policy Directives	As long as current	Destroy	Shred (unless otherwise notified)
Estate, bequests, and wills	5 years	Permanent Retention	Transfer to Parish Archives
Insurance: contacts, correspondence	5 years	Permanent Retention	Transfer to Parish Archives
Insurance: active and cancelled policies	As long as current	Permanent Retention	Transfer to Parish Archives
Legal: contacts and correspondence	5 years	Permanent Retention	Transfer to Parish Archives
Parish Policies and Procedures	As long as current	Permanent Retention	Transfer to Parish Archives
Publications: pamphlets, directories, anniversary books, newsletters, etc.	5 years	Permanent Retention	Keep 2 copies in Parish Archives. Send 1 copy to Archdiocese Archives.
Roster of parishioners (including parish registrations)	5 years	Permanent Retention	<p>If in paper format only – retain permanently.</p> <p>If entered in an electronic format – retain permanently in database.</p> <p>* Parishioner registration database will be the official record and kept permanently.</p>

Subject files	1 year	Selective Retention	Weed and only keep current information.
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## 2. Councils, Committees and Groups<sup>1</sup>

File Title	Active Phase	Retention Information	Disposition Instructions
Agendas and minutes	5 years	Permanent Retention	Transfer to Parish Archives
Constitutions and/or Bylaws	As long as current	Permanent Retention	Transfer to Parish Archives
Correspondence	5 years	Selective Retention	Transfer correspondence that documents an action or activity to Parish Archives.
Memos	2 year	Destroy	Shred
Ledgers	5 years	Permanent Retention	Transfer to Parish Archives
Members Lists	5 years	Permanent Retention	Transfer to Archives
Event registrations (including correspondence, registration forms, consent/permission slips for youth and related records)	10 years	Destroy	Shred
Reports	5 years	Permanent Retention	Transfer to Archives

## 3. Financial

File Title	Active Phase	Retention Information	Disposition Instructions
Accounts payable	7 years	Destroy	Shred
Accounts receivable	7 years	Destroy	Shred
Banking (statements, reconciliations, deposit slips)	7 years	Destroy	Shred
Budgets, Final	7 years	Permanent Retention	Transfer to Parish Archives
Charitable returns	7 years	Destroy	Shred
Collection envelopes	7 years	Destroy	Shred
Contributions/donations	7 years	Destroy	Shred
Fundraising campaign	7 years	Destroy	Shred

<sup>1</sup> The number of councils, committees and groups will vary by parish. Examples include the Parish Pastoral Council, Finance Committee, Liturgy Committee, Youth Group, Maintenance Committee, Stewardship Committee, etc.

General Ledgers	7 Years	Destroy	Shred
Journal entries	7 years	Destroy	Shred
Loans	7 years after the loan is paid in full	Destroy	Shred
Payroll	7 years	Destroy	Shred
Receipts (including copies of donation receipts)	7 years	Destroy	Shred
Year end: T4s	7 years	Destroy	Shred

#### 4. Personnel

File Title	Active Phase	Retention Information	Disposition Instructions
Appointment of Pastors	5 years	Permanent Retention	Transfer to Parish Archives
Employee files Including but not limited to: - employee contracts, - group retirement savings plan, - performance evaluations - salaries	Duration of employment	Notify Archdiocese Human Resources Office following cessation of employment.  Transfer to Parish semi-active records and keep for 7 years.  Destroy on the 8 <sup>th</sup> year.	Shred
Volunteer files	Duration of Volunteer Activity + 7 years	Destroy	Shred
Volunteer files – high risk ministry	Duration of Volunteer Activity + 7 years	Permanent Retention	Transfer to Parish Archives
Sick call records	1 year after completed	Destroy	Shred

## 5. Property Records

File Title	Active Phase	Retention Information	Disposition Instructions
Architectural drawings and specifications	7 years	Permanent Retention	Transfer to Parish Archives. Send paper or electronic copy to Archdiocese Archives.
Condition reports	7 years	Permanent Retention	Transfer to Parish Archives
Construction contracts	7 years	Permanent Retention	Transfer to Parish Archives
Construction files	7 years	Permanent Retention	Transfer to Parish Archives
Deeds	7 years	Permanent Retention	Transfer to Parish Archives
Leases / Facility rental	10 years	Destroy	Shred
Major repairs	7 years	Permanent Retention	Transfer to Parish Archives
Surveys	7 years	Permanent Retention	Transfer to Parish Archives
Tenders	7 years <sup>2</sup>	Permanent Retention	Transfer to Parish Archives

## 6. Sacramental

File Title	Active Phase	Retention Information	Disposition Instructions
Baptism Registers <sup>3</sup>	Until completed	Permanent Retention <sup>4</sup>	
Baptism & Profession of Faith Permanent files	5 years	Transfer to semi-active and destroy after 100 years	Shred
First Communion Registers	Until completed	Permanent Retention	
Confirmation Registers	Until completed	Permanent Retention	
Marriage Registers	Until completed	Permanent Retention	

<sup>2</sup> This applies only to accepted bids. Shred all non-accepted bids after 1 year.

<sup>3</sup> Copies of registers are made annually and sent to the Archdiocese to ensure against accidental or environmental loss, see Policy No. 809 Sacramental Registers Duplicates (Photocopies).

Sacramental Registers must be stored in a fireproof safe to mitigate this risk. See Policy No. 808 Storage and Care of Registers.

<sup>4</sup> Sacramental Registers are considered "Active" until they are completed. Once completed they become inactive but are NEVER destroyed.

Marriage files	5 years	Transfer to semi-active and destroy after 100 years	Shred
Burial Registers	Until completed	Permanent Retention	
Requests for sacramental records and accompanying documentation	1 year after completed	Destroy	Shred
Mass Intentions ledger	1 year after completed	Destroy	Shred
Book of the Elect	Until completed	Permanent Retention	Transfer to Parish Archives

## 7. Cemetery Records

File Title	Active Phase	Retention Information	Disposition Instructions
Accounts	7 Years	Destroy	Shred
Burial Permits	7 years	Permanent Retention	Transfer to Parish Archives
Plans	7 years	Permanent Retention	Transfer to Parish Archives
Plots	7 years	Permanent Retention	Transfer to Parish Archives
Registers	7 years	Permanent Retention	Transfer to Parish Archives