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RECORD RETENTION AND DISPOSITION SCHEDULE FOR PARISH AND SCHOOL

Primary Schedule

rev. 2002

SHORT-TERM RECORDS: DESTROY AS NOTED

Administrative: Election Ballots. [Destroy after 1 year; Shredding recommended.]
Administrative: Lector's Notes. [Destroy when superseded.]
Administrative: Liturgical Ministers' Schedules. [Destroy when superseded.]
Administrative: Mass Requests and Intentions. [Destroy when superseded.]
Financial: Bank Deposit Slips and Register. [Destroy after 5 years; Shredding recommended.]
Financial: Bank Statements. [Destroy after 5 years; Shredding recommended.] Financial: Canceled Checks and Check Stubs. [Destroy after 5 years; Shredding recommended.]
Financial: Cash Book (Daily Receipts and Disbursements). [Destroy after 5 years; Shredding recommended.]
Financial: Charitable Gaming General Account Records [Destroy after 3 years; Shredding recommended.]
Financial: Charitable Gaming Permits. [Destroy when superseded.]
Financial: Charitable Gaming Specific Account Records [Destroy after 2 years; Shredding recommended.]
Financial: Check Registers. [Destroy after 5 years; Shredding recommended.]
Financial: Correspondence on Payments/Receipts. [Destroy after 5 years; Shredding recommended.]
Financial: Expansion Fund Prospects. [Destroy when superseded; Shredding recommended.]
Financial: Grade and High School Collection Register. [Destroy after 7 years; Shredding recommended.]
Financial: Loan Files. [Destroy after 5 years; Shredding recommended.]
Financial: Paid Bills. [Destroy after 5 years; Shredding recommended.]
Financial: Pew Rent Record Book. [Destroy after 7 years; Shredding recommended.]

SHORT-TERM RECORDS (CONTINUED): DESTROY AS NOTED

Financial: Purchase Orders. [Destroy after 5 years; Shredding recommended.]
Financial: Receipts. [Destroy after 5 years; Shredding recommended.]
Financial: Special Collections. [Destroy after 7 years; Shredding recommended.]
Financial: Tax Records (Corporate and Personal). [Destroy after 7 years.]
Financial: Treasurer's Account Book. [Destroy after 7 years; Shredding recommended.]

Personnel: Employment Contracts. [Destroy 5 years after termination; Shredding recommended.]

Personnel: Individual Files (Applications, Contracts, Evaluations, Resumes). [Destroy 10 years after termination; Shredding recommended.]

Personnel: Job Descriptions. [Destroy when superseded.]

Personnel: Payroll Journal. [Destroy when superseded; Shredding recommended.]

Personnel: Social Security Withholding Records. [Destroy after 4 years; Shredding recommended.]

Personnel: Tax Forms (W-2s, W-3s, W-4s). [Destroy after 5 years; Shredding recommended.]

Personnel: Time Cards. [Destroy after 2 years; Shredding recommended.]

Personnel: Vacation and Sick Leave Forms. [Destroy after 5 years; Shredding recommended.]

Property: Equipment Files (Inspections, Instructions, Manuals, Warranties). [Destroy when superseded.]

Property: Insurance Records (Claims, Correspondence, Policies). [Destroy when superseded; Shredding recommended.]

Property: Inventories. [Destroy when superseded.]

Religious Education: Class Lists. [Destroy when superseded.]

Religious Education: Family Record (Parents, Children and Sacramental History). [Destroy when superseded; Shredding recommended.]

Religious Education: Program Files (Lesson Plans, Instructional Materials). [Destroy when superseded.]

Religious Education: Registration Forms. [Destroy after 1 year; Shredding recommended.]

Religious Education: Student Cards (Birth Date, Religion, Sacramental History). [Destroy after students' last school year; Shredding recommended.]

Religious Education: Student Files (Registrations, Progress Reports). [Destroy 5 years after students' last school year; Shredding recommended.]

Religious Education: Tuition Records. [Destroy after 7 years; Shredding recommended.]

LONG-TERM RECORDS: AFTER 40-70 YEARS, DESTROY AS NOTED

Personnel: Payroll Journal. [Destroy after 40 years.]

Sacramental: Annulment Case Files. [Destroy after 40 years; Shredding recommended.]

Sacramental: Dispensations. [Destroy after 70 years; Shredding recommended.]

Sacramental: Marriage Case Files. [Destroy after 70 years; Shredding recommended.]

PERMANENT RETENTION: TRANSFER TO DIOCESAN ARCHIVES AND/OR LOAN TO MARQUETTE FOR PRESERVATION MICROFILMING

Financial: Tax Exemption Records.

Sacramental: Baptismal Register.

Sacramental: Confirmation Register.

Sacramental: Death Register.

Sacramental: First Communion Register.

Sacramental: Professions of Faith.

Sacramental: Record of Anointings

PERMANENT RETENTION: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION
AND MICROFILMING

Administrative: Announcements (Weekly).
Administrative: Annual Report of Parish.
Administrative: Annual Report to Chancery.
Administrative: Appointments (Pastors) File.
Administrative: Articles of Incorporation (Parishes).
Administrative: Census Records.
Administrative: Communications from Bishop.
Administrative: Confraternity of Christian Doctrine Minutes.
Administrative: Constitutions and By-laws (Parish Organizations).
Administrative: Correspondence- Official (Parish Policy, Diocesan Directives).
Administrative: Correspondence- Routine. [After 1 year, selectively weed and destroy and transfer remainder to Marquette.]
Administrative: Parish Council Minutes.
Administrative: Parish Organizations' Records (Minutes, Reports, Rosters, Publications).
Administrative: Pastor's Papers (Correspondence, Diaries, Notes, Sermons).
Administrative: Project Materials on Lakota History and Culture (Writings).
Administrative: Religious Education Reports to Diocese.
Administrative: Rosters of Parishioners.
Administrative: Scrapbooks (Letters, News Clippings, Programs).
Administrative: Subject Files (Correspondence, Memos, Rules, Schedules).
[After 1 year, selectively weed and destroy and transfer remainder to Marquette.]
Cemetery: Account Cards.
Cemetery: Annual Report.
Cemetery: Board of Trustees Minutes.
Cemetery: Burial Records.
Cemetery: Contracts/Agreements.
Cemetery: Lot Maps.
Cemetery: Rules and Regulations.
Finance Committee Minutes.
Financial: Audit Reports.
Financial: Building Fund Account Book.
Financial: General Ledger.
Financial: Statements.
Financial: Trust Fund/Estate Contributions.
Jesuits (Personal): Letters.
Jesuits (Personal): News clippings.
Jesuits (Personal): Project Materials on Christianity, Society of Jesus, etc. (Writings).
Jesuits (Personal): Project Materials on Lakota History and Culture (Writings).
Property: Appraisals.
Property: Architectural Drawings (Blueprints) and Specifications of Buildings.
Property: Construction Files (Contracts, Correspondence).
Property: Deeds (Including Abstracts).
Publications: Activity Programs.
Publications: Anniversary Booklets.
Publications: Annual Reports (Parish).
Publications: Bulletins.
Publications: Histories.
Publications: Informational Books and Pamphlets.

Publications: Newsletters.
Publications: Parish Organizations.
Publications: Public Relations.
Publications: Public Relations.
Religious Education: Administrative Files (Budgets, Correspondence,
Notes). [After 1 year, selectively weed and destroy and transfer
remainder to Marquette.]
Religious Education: Annual Report.

PERMANENT RETENTION: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION
AND DIGITAL SCANNING

Administrative: Pastor's Papers (Photographs).
Administrative: Photographs (Clergy, History, Parishioners, Property).
Administrative: Project Materials on Lakota History and Culture
(Photographs).
Administrative: Scrapbooks (Photographs).
Jesuits (Personal): Photographs.
Jesuits (Personal): Project Materials on Christianity, Society of Jesus,
etc. (Photographs).
Jesuits (Personal): Project Materials on Lakota History and Culture
(Photographs).
Publications: Photographic Files.

PERMANENT RETENTION: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION
AND REFORMATTING

Administrative: Project Materials on Lakota History and Culture
(Audio/Video Recordings and Footage).
Jesuits (Personal): Audio/Video Recordings (Discussions and Interviews).
Jesuits (Personal): Project Materials on Christianity, Society of Jesus,
etc. (Audio/Video Recordings and Footage).
Jesuits (Personal): Project Materials on Lakota History and Culture
(Audio/Video Recordings and Footage).
Publications: (Audio/Video Recordings and Footage).

REFERENCE SOURCES: *Records Management for Parishes and Schools*, compiled
by David P. Gray, Association of Catholic Diocesan Archivists, 1987;
*Managing Public Records, Common Records Retention and Destruction
Schedules, A Guide for South Dakota Local Schools*, State of South
Dakota Bureau of Administration, Records Management Program, 1985, pp.
54-60; and *A Divine Legacy, Record Keeping for Religious
Congregations/Orders*, compiled by Denis Sennett, S.A., Franciscan
Friars of the Atonement, 1993