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RECORD RETENTION AND DISPOSITION SCHEDULE FOR PARISH AND SCHOOL

Primary Schedule

rev. 2002

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

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 [Destroy when superseded.]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 [Destroy when superseded.]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 [Destroy when superseded.]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 [Destroy when superseded.]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 [Destroy when superseded; Shredding recommended.]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 BUT LOANED TO DIOCESE OR 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).

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

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.

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

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).