

Records Retention Schedule for Religious Education Programs

Retention periods listed are given in **years**, unless otherwise noted. Upon expiration of the retention period, identified records are to be disposed of in accordance with the method (Code) indicated.

*Employment Records also refer to volunteer catechists and office workers.

ALL records must be kept on parish grounds and NO records are to be stored at private homes.

Disposal Codes:

1. Routine Handling: No special precautions are necessary upon disposal. These records should be recycled or disposed of in accordance with standard parish procedures.
2. Special Handling: The destruction of records containing confidential or sensitive information that requires special handling by shredding, burning, recycling, or any other method that reduces the information to an illegible condition.
3. Archival Retention: Records requiring permanent retention or records that have sufficient archival or historical value must be preserved in perpetuity.

Record Description	Retention Period (yrs.)	Disposal Code
Accounting Records – All financial records should follow the parish record retention policy		
Corporate Records – All corporate records should follow the parish record retention policy		
Correspondence Records		
General	3 years; Legal - permanently	2
Complaints	6 years after resolution	2
Press releases	3 years	1
Parent Correspondence (individual)	3 years after student no longer enrolled	2
Newsletters and General Parent Correspondence	1 year	1
Insurance Records – All insurance records should follow the parish record retention policy		
Personnel Records – Catechist/Volunteer		
Clearances – sexual abuse/criminal/all necessary for employment (may be housed in parish files)	Permanently	3

Annual Mandated Reporter Compliance document, Statement of Intent for Compliance, Safe Environment training records	Permanent	3
Any and ALL other Child Protection documents not specifically noted	Permanent	3
Employment/Volunteer Applications not hired	3 years	2
Employment/Volunteer Applications hired	Permanent	3
Contracts – Expired	7 years	2
Personnel Files – from date of termination Evaluations, reference checks, medical records, resignation/retirement records	7 years after employment ends	2
Attendance Records – from date of termination	3 years	2
Complaints (By or About an Employee)	7 years after employment ends	2
Professional Development / Continuing Education	7 years after employment ends	2
Credentials (Certificates, licenses, etc.)	Permanent	3
Discipline Records	Permanent	3
Program Records		
Annual Report to the Diocese (copy)	Permanent	3
Schedules	1 year	1
Text/Curriculum information	7 years	1
Lesson Plans	2 years	1
Committee meeting minutes or notes	2 years	1
Programs or outlines for functions	1 year	1
Purchasing and Sales Records – All Purchasing and Sales records should follow the parish record retention policy		
Student Records		
Student Progress Records	3 years after student no longer enrolled	2
Medical Records	3 years after student no longer enrolled	2
Student Attendance Records	3 years after student no longer enrolled	2
Family/Student Registration Records	3 years after students no longer enrolled	2

Permission Slips/Photo Release	3 years after student turns 18 years old	2
Class Lists	3 years	2
Absentee Excuses	1 year	1
Child Protection In-servicing	Permanently	3

***Sacramental records are parish records and must be kept in the parish office files.**

All confidential and child protection records must be kept in a locked storage system.