

DIRECTIONS FOR USING THE RECORD RETENTION SCHEDULE

The Record Retention Schedule is provided in two different formats. The first lists the records by record type and the second lists the records by category.

Record Type refers to the particular contents of the documents that constitute the records.

Category refers to the general department, administrative unit, location, or grouping that applies to the type of record, as follows:

- **Administrative:** Pertaining to administration at all locations
- **Canonical:** Maintained by the Vicar for Clergy or Tribunal
- **Cemetery:** Maintained by the Cemeteries Department
- **Financial:** Accounting, banking, bookkeeping, investment records
- **Financial Services:** Maintained by the archdiocesan Financial Services Department
- **Human Resources:** Records pertaining to lay employees, clergy, volunteers
- **Insurance:** Accident, liability, workers compensation records
- **Legal:** Maintained by the archdiocesan Legal Department
- **Parish:** Pertaining to parishes
- **Real Estate/Property:** Pertaining to real estate or property at all locations
- **Sacramental:** As defined in and required by the Handbook for Sacramental Records
- **Schools:** Maintained by archdiocesan elementary and high schools
- **Technology:** Maintained by Information Technology staff at all locations
- **Trusts and Estates:** Maintained by the archdiocesan Trusts and Estates Department
- **Vocations:** Maintained by the archdiocesan Vocations Office or Juan Diego House

Retention Period refers to the length of time the records should be retained.

- **X years** is measured from the date on the document.
- **X years after _____** or **X years from _____** is measured from the event identified.
- **Permanent** means the document contents are fixed and not subject to revision. These records are never destroyed.
- **Perpetual** means the document contents are updated periodically. The current operative record is the only copy retained; prior versions may be destroyed.

