



The Roman Catholic Diocese of
BATON ROUGE

Roman Catholic Diocese of Baton Rouge
Records Retention Schedules
Effective Date July 1, 2022

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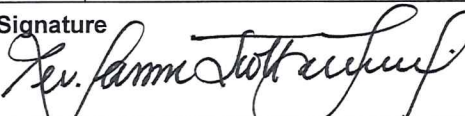


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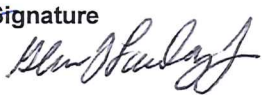
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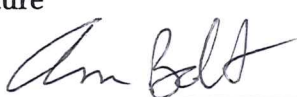
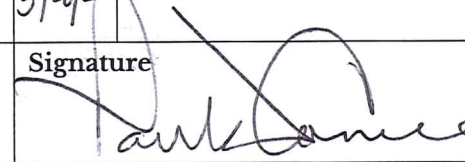
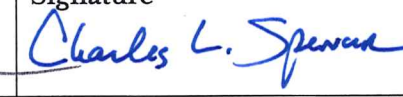

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section FINANCE- ACCOUNTING				Effective Date July 1, 2022		Schedule No. FIN-22-01		Page 1 of 3	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Accounts Payable		Records documenting payable to vendors for goods or services. May include copies of invoices, check copies, purchase orders, etc. Retain for four years. <i>IRS Tax Guide for Churches and Religious Organizations</i>		2	2	4	Destroy 4 years after date created		
Accounts Receivable		Documentation of monies received by the diocese or a diocesan entity during the course of business. Retain for four years. <i>IRS Tax Guide for Churches and Religious Organizations</i>		2	2	4	Destroy 4 years after date created		
Annual Diocesan Financial Report		Annual financial report submitted to the Diocesan Finance Department by administrators documenting the financial operations and conditions of the parish, school or institution. Permanent <i>Administrative Decision</i>		4	P	P	Permanent		
Assets		Records documenting the purchase of assets over \$5,000. Maintain for the life of the asset then destroy four years after asset is disposed of. <i>IRS Tax Guide for Churches and Religious Organizations</i>		Active	4	Active +4	Destroy 4 years after disposal of asset		
Auditors Reports		Annual report prepared by outside Auditors of the finances of the institution. Permanent. <i>Administrative Decision</i>		4	P	P	Permanent		
Date 5/26/22	Chancellor Approval (Print) Mrs. Ann T. Boltin		Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David		Date 5/26/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer		
Signature 		Signature 		Signature 		Signature 			


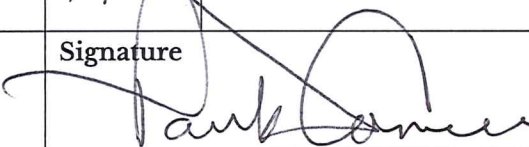
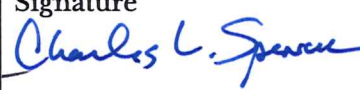

Department/Section FINANCE- ACCOUNTING				Effective Date July 1, 2022		Schedule No. FIN-22-01		Page 2 of 3	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Budget		Annual budget approved by Finance Council or other authority. Permanent. <i>Administrative Decision</i>		4	P	P	Permanent		
Charitable Gaming		Diocesan entities that sell raffle tickets may maintain number of tickets sold, prizes given, information on person winning ticket. Retain three years, destroy. Diocesan entities that engage in charitable gaming (Bingo, Keno) may maintain bank statements, cancelled checks, deposit slips, invoices and receipts, records of daily gaming activity. Retain for three years, destroy. Louisiana Administrative Code 42: 1721 A (2) Louisiana Administrative Code 42: 1731 A-B		2	1	3	Destroy 3 years after gaming event		
Loans Actuarial reports		Diocesan loans made to parishes, schools and other institutions for large projects approved by Bishop. Schedules maintained to demonstrate principal and interest payments over the life of the loan. Retain in office for the life of the loan. Permanent. <i>Administrative Decision</i>		Active	P	P	Permanent		
Investment Reports		Reports generated by outside companies and distributed quarterly calculating investment income. Retain year end report Permanently. <i>Administrative Decision</i>		4	P	P	Year end report Permanent		
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/22	Department Head or Cabinet Secretary Approval (Print) Mr. Glenn Landry, Jr.		
Signature 		Signature 		Signature 		Signature 			

Department/Section FINANCE- ACCOUNTING				Effective Date July 1, 2022		Schedule No. FIN-22-01		Page 3 of 3	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Payroll Records		Payroll summary of employees, includes labor distributions, worksheets, benefit accrual reports, garnishments, time card, etc. Retain for four years, destroy. 29 CFR: 1627.3 (a) and 29 CFR 516.5		2	2	4	Destroy 4 years after date created		
Payroll Taxes		Quarterly payroll tax reports form 941, 1099 forms, W-2, W-4, Social Security withholding, Louisiana State withholding tax. Retain for 4 years from filing date, destroy. 26 CFR 31.6001-1 (e)(2)		2	2	4	Destroy 4 years past filing date		
Sales Tax Returns		Quarterly sales tax reports for state and local sales revenue. Form 1029. Retain for four years from filing date, destroy. <i>IRS Tax Guide for Churches and Religious Organizations</i>		2	2	4	Destroy 4 years past filing date		
Transaction Journals		Financial information regarding all aspects of accounting- these records include the following Journal entries, bank statements, check registers, cancelled checks, trial balance, Profit & Loss Statements, Deposits. Retain for four years, destroy. <i>IRS Tax Guide for Churches and Religious Organizations</i>		2	2	4	Destroy 4 years after date created		
Year End General Ledger		Annual summary for all financial transactions for all funds and accounts. Permanent. <i>Administrative Decision</i>		P	P	P	Permanent		
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/22	Department Head or Cabinet Secretary Approval (Print) Mr. Glenn Landry, Jr.		
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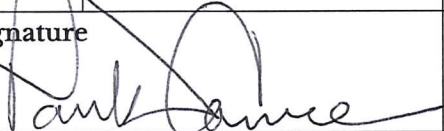


DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section ADMINISTRATIVE				Effective Date July 1, 2022		Schedule No. ADM-22-01		Page 1 of 3			
Records Series Title		Description		Retention Period (years)			Total Retention				
				Office	Storage	Total					
Annual Reports		Documents the annual activity of a program or department. Submit to archives for review. Administrative Decision		3	0	AR	Archival Review				
Budget (office copy)		Annual summary of departments allowed expenditures original submitted to Finance, destroy. Administrative Decision		Active+2	0	3	3				
Calendar		May be in digital or paper format, contains information regarding events, appointments, daily business. Retain until administrative usefulness is complete, department directors submit to archives for review. Administrative Decision		Active+2	0	3	Archival review for Directors				
Correspondence Administrative		Letter, memos, e-mail, etc. between Department Directors, Chancery Officials, other diocesan entities, and or the public. Retain for 10 years in office. Submit to archives for review. Administrative Decision		10	0	10	Archival Review				
Correspondence General		Letter, memos, e-mail, etc. between departments, other diocesan entities, and or the public. Retain for two years in office. Review, retain any correspondence that has ongoing administrative value. LA RS 44. 36		2	2	4	Destroy				
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin		Date 5/20/22	Canonical Counsel Approval (Print) Very Rev. Paul D. Counce		Date 5/20/22	Diocesan Attorney Approval (Print) Mr. Charles Spencer		Date 20 May 2022	Department Head or Cabinet Secretary Approval (Print) Very Rev. Jamin S. David	
Signature 		Signature 		Signature 		Signature 					





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section ADMINISTRATIVE					Effective Date July 1, 2022	Schedule No. ADM-22-01	Page 2 of 3	
Records Series Title		Description			Retention Period (years)			Final Disposition
					Office	Storage	Total	
Correspondence Executive/Historic		Letter, memos, e-mail, etc. that documents significant events or decisions, that illustrate the history of the person, position, department, or organization. Retain in office until administrative usefulness is complete, transfer to archives for review. Administrative Decision			Active	P	P	Archival review
Grants		Documentation created to track the progress of funded projects. May include application, correspondence, contracts, etc. Retain for 3 years after completion of the terms of the grant. Keep summary report of completion of grant permanently. Transfer to archives for review. LA RS 44.36			Active	3	Active+ 3	Destroy
Newsletters		Publication created by diocesan departments and distributed within diocese or to the public. Contains articles, news, and information about diocese. Retain one copy permanently, submit to archives for long-term preservation. Administrative Decision			1	P	P	Permanent
Policies		Document the policies and procedures for departments, schools, and parishes of the diocese. Retain until superseded by new policy or administrative value ceases. Submit to Archives. Administrative Decision			Active	0	P	Permanent
Date 5/2/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 5/20/2022	Canonical Counsel Approval (Print) Very Rev Paul D. Counce	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 20 May 2022	Department Head or Cabinet Secretary Approval (Print) Very Rev Jamin S. David	
Signature 		Signature 		Signature 		Signature 		





DIOCESE OF BATON ROUGE-Records Retention Schedule





Department/Section ADMINISTRATIVE						Effective Date July 1, 2022	Schedule No. ADM-22-01	Page 3 of 3	
Records Series Title		Description				Retention Period (years)			Final Disposition
						Office	Storage	Total	
Press Releases		Issued by the diocese or departments concerning news, events, and responses b. Retain one copy in office three years transfer to Archives for review. Administrative Decision				Active+2	0	P	Permanent
Project Files		Files relating to a limited or one-time action of the diocese. (Special fund drive, campaign, etc.) May include correspondence, reports, and data, gathered to document aspects of the project. Retain in office 1 year following completion of project, transfer to Archives for permanent retention. Administrative Decision				Active+1	P	P	Permanent
Special Event Files		Records of the planning, administration, and follow-up to special events held in the diocese. May include correspondence, programs, flyers, financial records, photographs, clippings, etc. Retain for 3 years then transfer to Archives. Administrative Decision				3	P	P	Permanent
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 5/20/2022	Canonical Counsel Approval (Print) Very Rev. Paul D. Counce	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 20 May 2022	Department Head or Cabinet Secretary Approval (Print) Very Rev. Jamin S. David		
Signature 		Signature 		Signature 		Signature 			

DIOCESE OF BATON ROUGE-Records Retention Schedule




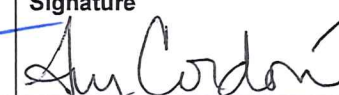
Department/Section HUMAN RESOURCES- BENEFITS (HEALTH INSURANCE)				Effective Date July 1, 2022		Schedule No. HR-22-03		Page 1 of 2	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Monthly Billing Reports		Reports that identify locations and payments broken down by benefit. Retain 2 years in office, 2 years in storage. Destroy after 4 years. 26 CFR 31.6001.1		2	2	4	Destroy 4 years after date created		
Clergy and Lay Employee Insurance File		File generated by Diocesan Insurance Office recording health insurance benefits for diocesan clergy and lay employees. These files were closed in 2015 and new information is kept electronically. Historic file needed for Medicare enrollment. Permanent. 29 CFR 1627.3 (b)(2)		Life of Individual	P	P	Permanent		
Benefit Renewal and Plan Documents		Records relating to annual renewal of benefit plans for the diocese. May include legal and general correspondence, annual rate information, plan documents, summary plan descriptions, preferred premium file, contracts and policies. Retain until superseded, transfer to archives. <i>Administrative Decision</i>		3	P	P	Permanent		
Health Lives Annual Reward Payout		Records relating to annual rewards given to employees who meet certain criteria for payouts through Healthy Lives Program. Retain for 4 years and then dispose. <i>IRS Tax Guide for Churches and Religious Organizations</i>		2	2	4	Destroy 4 years after payout		
Disability Claims		Records related to long or short term disability claims. Retain 5 years after claim is closed. <i>Administrative Decision</i>		3	2	5	Destroy 5 years after claim is resolved		
Date 5/20/22	Chancellor Approval (Print) Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date	Department Head or Cabinet Secretary Approval (Print) Mrs. Anita L. Krail		
Signature 		Signature 		Signature 		Signature 			

DIOCESE OF BATON ROUGE-Records Retention Schedule





Department/Section HUMAN RESOURCES-BENEFITS (HEALTH INSURANCE)				Effective Date July 1, 2022		Schedule No. HR-22-03		Page 2 of 2	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
HSA Deposits		Monthly statements of deposits made to the diocesan health savings account on behalf of their enrolled members. Retain for 4 years and then destroy. <i>IRS Tax Guide for Churches and Religious Organizations</i>		2	2	4	Destroy		
Benefit Plan Communications		Communications between benefit offices and employees of the diocese. May include announcements regarding Open enrollment, Healthy Lives, 401K enrollment, deadlines to enroll, changes in plans or benefits. Retain for 2 years, transfer to archives <i>Administrative Decision</i>		2	0	2	Send to archives for review		
Date 5/20/22	Chancellor Approval (Print) Ann T. Boltin	Date 29 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date	Department Head or Cabinet Secretary Approval (Print) Mrs. Anita L. Krail		
Signature 		Signature 		Signature 		Signature 			

Department/Section HUMAN RESOURCES- BENEFITS (RETIREMENT)					Effective Date July 1, 2022	Schedule No. HR-22-02	Page 1 of 1
Records Series Title		Description		Retention Period (years)			Final Disposition
				Office	Storage	Total	
Actuarial Reports (Lay People & Diocesan Priests)		Actuary company generated report detailing the status of and projections for the previous lay employee diocesan pension plan. This plan was frozen on June 30, 2009. Diocesan Priest retirement plan remains active. Retain in office current year plus one. Permanent transfer to archives 29 CFR 1627.3 (b)(2)		Current Year + 1	P	P	Permanent
Employee Summary Report		Annual participant data compiled by the actuary company. Summary of benefits provided to participants. Retain in office current year plus one. Permanent. May be stored with actuary reports for corresponding years. 29 CFR 1627.3 (b)(2)		Current Year + 1	P	P	Permanent
401 K Enrollment Forms		Enrollment forms for 401K retirement plan for all diocesan employees. Includes beneficiary information, contribution amount, authorization to enroll. Permanent. 29 CFR 1627.3 (b)(2)		Active	P	P	Permanent
401 K Investment Statements & Annual Reviews		Annual and quarterly statements on investments for 401 K retirement plan. Annual reviews of 401 K retirement plan by third party. Retain annual statements and reviews permanently.		2	P	P	Permanent
Lay Employee Retirement File		Monthly benefit information for each retiree within the diocesan system. Filed alphabetically by last name. Upon death of retiree transfer to archives once estate is settled. Keep current year plus one in office. Transfer to archives, permanent. 29 CFR 1627.3 (b)(2)		Current Year + 1	P	P	Permanent
Diocesan Priest Retirement File		Monthly benefit information for retired diocesan priests. Filed alphabetically by last name. Upon death of retiree transfer to archives once estate is settled. Keep current year plus one in office. Transfer to archives, permanent. 29 CFR 1627.3 (b)(2)		Life of Individual +1	P	P	Permanent
Date 5/26/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/26/22	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date	Department Head or Cabinet Secretary Approval (Print) Mrs. Anita L. Krail
Signature 		Signature 		Signature 		Signature 	





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section OFFICE OF CHILD & YOUTH PROTECTION				Effective Date July 1, 2022		Schedule No. OCYP-22-01		Page 1 of 1			
Records Series Title		Description		Retention Period (years)			Final Disposition				
				Office	Storage	Total					
Audit Files- Central Registry		Records created by parishes and schools to comply with the annual OCYP audit. Includes Institution Head Receipt of Policy form, Dynamics of Disclosure sign-in sheet, Schedule of Training Dates form, Parent Training sign-in sheet flyer, Children's Training Opt Out letters, Safe Environment Verification form, Safe Environment Curriculum Training summary sheet records created for all Parishes, Schools, and Institutions that are required to comply with OCYP mandates.		Active + 4	P	P	Permanent				
USCCB Diocesan Auditor Records		Records pertaining to annual USCCB Independent Audit of Diocesan OCYP program. May include Audit Instrument, A/B Chart, correspondence between OCYP and auditing firm, compliance documents.		Active + 4	P	P	Permanent				
Child Protection Case File		File created for Clergy, Personnel and Volunteers for violations of the Code of Ethics. Includes Notification form, investigation notes, Resolution and Recommendation of Credentialing status.		Active + 4	P	P	Permanent				
Child Protection Credentialing File		Credentialing files for Clergy, Personnel or volunteers that work with children. Contains application, Code of Ethics, Background Check, Training Certificate. May also contain Compliance Record for secondary location applicants. If applicable Background Check Disposition Statements, Non Criminal Justice Applicant Privacy Rights, Agency Privacy Requirements for Non Criminal Justice Applicants, and Code of Ethics Violation Notifications may also be found in this file.		Active+4	P	P	Permanent				
Child Protection Compliance File		Files created for all clergy, employees and volunteers of the Diocese of Baton Rouge. Includes training certificates and Code of Ethics acknowledgment.		Active + 4	P	P	Permanent				
State & Federal CHRI Compliance File		Records pertaining to compliance with State and Federal Regulations on protection of CHRI. Includes CJIS Certificates, Acknowledgment Statement of Abuse, Security Incident Reporting Form.		Active + 4	P	P	Permanent				
Date 5/24/22	Chancellor Approval Mrs. Ann T. Boltin		Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David		Date 5/24/22	Diocesan Attorney Approval (Print) Mr. Charles Spencer		Date 5/20/22	Department Head or Cabinet Secretary Approval (Print) Mrs. Amy J. Cordon	
Signature 		Signature 		Signature 		Signature 					


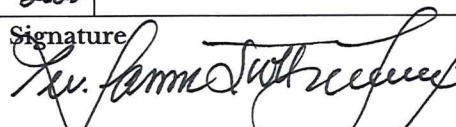

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section FINANCE- CORPORATE & PROPERTY				Effective Date July 1, 2022		Schedule No. FIN-22-02		Page 1 of 2	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Articles of Incorporation/Corporate Charters		Documents filed with the Secretary of State which define the provisions of the corporation and its rules of operation. Retain for administrative use and then transfer to archives. Permanent <i>Administrative Decision</i>		Active	P	P	Permanent		
Bylaws		Rules adopted by an organization chiefly for the government of its members and the regulation of its affairs. Retain for administrative use and then transfer to archives. Permanent <i>Administrative Decision</i>		Active	P	P	Permanent		
Construction Files		Records relating to building projects for diocesan facilities. Includes "as built" blueprints, renderings, specifications, contracts for construction, correspondence. Retain for the life of the facility. Transfer a copy of all blueprints and specs to archives upon building completion. <i>Administrative Decision</i>		Active	P	P	Permanent		
Corporate Resolutions		Created by the Finance Department to document an agreement for a purchase over \$15,000 between the diocese and a diocesan entity. Resolutions are also created to allow purchasing power by individuals on behalf of the diocesan entity. Permanent <i>Administrative Decision</i>		Permanent	P	P	Permanent		
Date 5/24/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/24/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/22	Department Head or Cabinet Secretary Approval (Print) Mr. Glenn Landry, Jr.		
Signature 		Signature 		Signature 		Signature 			




DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section FINANCE- CORPORATE & PROPERTY				Effective Date July 1, 2022		Schedule No. FIN-22-02		Page 2 of 2			
Records Series Title		Description		Retention Period (years)			Final Disposition				
				Office	Storage	Total					
Donations – Bequests \$10,000 or more		Record of large donations (\$10,000 or more) of property, materials, or funds between individuals and the diocese or diocesan entities. Retain for 4 years after filing of return. Archival review <i>IRS Tax Guide for Churches and Religious Organizations</i>		Tax filing +4	0	4	Transfer to Archives for review				
Donations- Bequests less than \$10,000		Records of gifts, donations, or other material with a value less than \$10,000. Retain for four years after tax filing. Destroy, <i>IRS Tax Guide for Churches and Religious Organizations</i>		Tax Filing + 4	0	4	Destroy 4 years after filing date				
Minutes		Recorded information on matters discussed in meetings of groups, councils, committees, etc. Retain permanently transfer to archives <i>Administrative Decision</i>		Permanent	P	P	Permanent				
Policies		Property, casualty, liability policies for all diocesan owned property as well as policies for all diocesan entities. All policies are permanent and must be maintained regardless of expiration, cancellation, or dissolution. Permanent. <i>Administrative Decision</i>		Permanent	P	P	Permanent				
Property Records		Deeds, titles, Acts of Sale, mortgages, property surveys, resolutions, correspondence, relating to the ownership, purchase, or sale of real property. Permanent retention, transfer to archives upon disposal of property. <i>Administrative Decision</i>		Permanent	P	P	Permanent				
Date <i>5/2/22</i>	Chancellor Approval (Print) Mrs. Ann T. Boltin		Date <i>20 May 2022</i>	Canonical Counsel Approval (Print) Very Rev. Jamin S. David		Date <i>5/20/2022</i>	Diocesan Attorney Approval (Print) Mr. Charles Spencer		Date	Department Head or Cabinet Secretary Approval (Print) Mr. Glenn Landry, Jr.	
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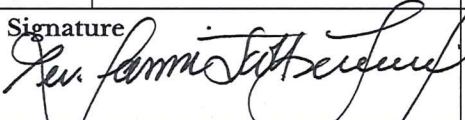

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section LEGAL				Effective Date July 1, 2022		Schedule No. LGL-22-01		Page 1 of 1	
Records Series Title		Description		Retention Period (years)			Total Retention		
				Office	Storage	Total			
Canonical Documents		May include decrees, declarations, pronouncements. Permanent retention. <i>Administrative Decision</i>		Current + 10	P	P	Permanent		
Civil Case Files		May contain request for investigation, correspondence, subpoenas, court documents (arbitration briefs, transcripts, motions, decisions), financial statements of case, copy of requests for funds and disbursements, client documents, case summary sheet, etc. Permanent retention, submit to Archives. <i>Administrative Decision</i>		Active + 1	P	P	Permanent		
Closed Wills, Estates, & Trust Files		Copy of will, correspondence, record of receipt, and other legal records. Permanent retention. <i>Administrative Decision</i>		5 years	P	P	Permanent		
Contracts		Recorded between two or more parties in which each party agrees to perform services or provide goods in exchange for compensation. Retain for 10 years upon completion of terms, expiration, or cancellation. <i>Administrative Decision</i>		Active + 10	0	10	10		
Date 5/24/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/24/22	Diocesan Attorney Approval (Print) Mr. Charles Spencer				
Signature 		Signature 		Signature 					


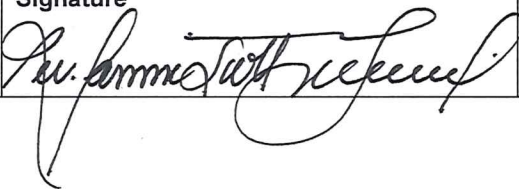


DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section PARISH				Effective Date July 1, 2022	Schedule No. PAR-22-01	Page 1 of 2
Records Series Title	Description	Retention Period (years)			Final Disposition	
		Office	Storage	Total		
Annual Financial Reports	Record shows annual financial activity of parish, includes detailed supporting accounts schedules, submitted to the diocese annually. Retain permanently. <i>Administrative Decision</i>	5	P	P	Permanent	
Bulletins	Weekly publication covering events in the parish. Retain permanently, contains historical information. <i>Administrative Decision</i>	20	P	P	Permanent	
Cemetery Records	Register or files of internments and plot sales for parish cemetery. May include plot books, maps, receipts, contracts or record of internments. Permanent retention. LA. R.S. 8:314	P	P	P	Permanent	
Commemorative Books / Directories	Books prepared to commemorate a special event in the life of a parish. Retain one copy permanently, send one copy to the archives for preservation. <i>Administrative Decision</i>	4	P	P	Permanent	
Liturgy Files	File which documents various special liturgical events that are unique to the parish. Consists of handouts, notes, etc. Retain permanently. <i>Administrative Decision</i>	5	P	P	Permanent	
Marriage Files	Permanent file for every wedding, convalidation and sanation that is administered through the parish. May contain prenuptial investigations, copies of sacramental records, contracts, and other data sheets. Retain permanently. <i>Diocesan Pagella & Policies</i>	10	P	P	Permanent	
Date 5/24/22	Chancellor Approval (Print) Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/24/22	Diocesan Attorney Approval (Print) Mr. Charles Spencer	
Signature 		Signature 		Signature 		


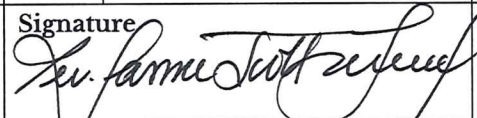


DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section PARISH				Effective Date July 1, 2022		Schedule No. PAR-22-01		Page 2 of 2	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Mass Attendance Record		Periodic record of attendance (numerical) at each Mass during the year. Submit numbers to Chancery at the end of the year. <i>Administrative Decision</i>		2	P	P	Permanent		
Mass Stipend Records		Record of intentions and (monetary stipends taken for these) during the calendar year. Retain for four years then dispose. <i>IRS Tax Guide for Churches and Religious Organizations</i>		4	0	4	Destroy		
Parishioner Contribution Records		Record of contributions made by each identified giver. Shows amount, date, year's total. Retain for four years. <i>IRS Tax Guide for Churches and Religious Organizations</i>		4	0	4	Destroy		
Pledge Cards		Record of pledges and payments . May show parishioner name, pledge amount, how pledge will be paid, etc. Retain for three years after final payment or pledge terminated. <i>Administrative Decision</i>		3	0	3	Destroy 3 years after final payment		
Sacramental Records		Records documenting the reception of sacraments by individuals. Retain permanently. Transfer to Archives all registers that are over seventy-five years old, are no longer used administratively, or are in disrepair. Canon 535 § 1		75	P	P	Permanent		
Spiritual and Pastoral Reports		Record of annual parish status, includes statistics on sacraments performed, parish activities, parishioner profile, etc. Retain permanently, <i>Administrative Decision</i>		5	P	P	Permanent		
Date 5/24/22	Chancellor Approval (Print) Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer				
Signature 		Signature 		Signature 					





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Parish School of Religion – Addendum to Parish Retention Schedule					Effective Date 11/1/2022	Schedule No. PAR-22-02	Page 1 of 1
Records Series Title		Description		Retention Period			Total Retention
				Office	Storage	Total	
Catechetical Profiles		Records of catechetical and faith formation for primarily diocesan employees, volunteers, and interested parishioners. These records include in-house created Ministry and Theology courses completed at both the Basic and Intermediate levels. They can also include any undergraduate (Advanced Certification) or graduate-level (Professional Certification) courses taken in theology or related field at any accredited college or university. The profiles also retain records of Catholic Sexual Morality Certification as well as any events approved for Enrichment credits.		P (All records prior to 2005 submit to Diocesan Archives)	P	P	Permanent
		Administrative Decision					
Parent Signature Forms		Permission slips, handbook acknowledgements, permission to photograph, etc. Records signed by parents or legal guardians granting permissions or authority. Retain for 2 years after the date of the event if no incident. If incident, retain until settled and advised by Counsel.		Date of Event + 2	0	2	Destroy 2 years after date of event if no incident
		Administrative Decision					
PSR Student Files		Records for students enrolled in parish school of religion. May contain; registration forms, copies of sacramental certificates, correspondence, grades, legal/custody documents, records transfer request, etc. Maintain as long as student is enrolled in the program. Retain for two years after separation, transfer or completion.		Active	1	Active +2	Destroy 2 years after student has separated, transferred or completed
		Administrative Decision					
Student Cumulative Record		Record of student education through the Religious Education Program. Includes contact information for student, classes attended, catechist information, grades, dates of attendance, etc. Retain for 10 years after student has separated, transferred, or completed.		10	0	10	Destroy after 10 years
		Administrative Decision					
Date Oct. 18, 2022	Chancellor Approval (Print) Ann T. Boltin	Date 10/18/22	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 10/19/22	Diocesan Attorney Approval (Print) Mr. Brad Kline	Date 10/25/22	Department Head or Cabinet Secretary Approval (Print) Dina Dow
Signature 		Signature 		Signature 		Signature 	





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Human Resources- Personnel				Effective Date July 1, 2022		Schedule No. HR-22-01		Page 1 of 3			
Records Series Title		Description		Retention Period (years)			Final Disposition				
				Office	Storage	Total					
Compensation and Classification		Records relating to salary scale, classification of positions, includes wage rate tables. Retain until obsolete or superseded then retain for 2 additional years. Destroy. 29 CFR 516.6 (a)(2)		Active	2	Active + 2	Destroy 2 years after obsolete or superseded				
Employment Application/Resume		Applications or resumes submitted to the diocese for those seeking employment whether solicited or unsolicited. Maintain for 1 year after receipt for candidates not selected. Destroy. 29 CFR 1627.3 (b)(1)(i)		1	0	1	Destroy 1 year after receipt if not selected				
Employee Personnel File (Note this applies to STAFF ONLY- please see School Schedule for Teacher Personnel File Retention)		File maintained for individuals who are employed by the diocese. May contain application, resume, correspondence, confidentiality agreement, performance evaluations, disciplinary actions, signed acknowledgments, certificates of achievement or training, contracts for employment, job description, salary information. Retain for 6 years after separation. Destroy. 29 CFR 1627.3		Active + 2	4	6	Destroy 6 years after separation				
Employee Work Related Illness Reports		Medical and health records for diocesan employees in relation to work related illness. Maintain for 6 years after separation. 29 CFR 1904.33		Active + 2	4	6	Destroy 6 years after separation				
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin		Date 5/20/2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David		Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer		Date 5/23/22	Department Head or Cabinet Secretary Approval (Print) Mrs. Anita L. Krail	
Signature 			Signature 			Signature 			Signature 		





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Human Resources-Personnel				Effective Date July 1, 2022		Schedule No. HR-22-01		Page 2 of 3	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Employee Medical (Hazardous Exposure)		Medical and health records for diocesan employees in relation to work related exposure to toxic substances or harmful physical agents. Records may include monitoring records demonstrating level of exposure, first aid records, health questionnaires, on the job medical complaints. Maintain records for length of employment plus 30 years. Destroy 29 CFR 1910.1020 (d)(1)(ii)		Active + 2	28	30	Destroy 30 years after separation		
EEOC Complaints		Complaint of discrimination in the workplace or in hiring practice brought forth by the employee or applicant against the diocese. Records may include complaint, correspondence, Letter of Determination, mediation and resolution records, Dismissal and Notice of Rights. If dismissed, retain for one year after complaint is dismissed unless suit is filed by complainant. If Letter of Determination is issued, retain for one year past resolution unless suit is filed. Destroy 29 CFR 1602.14		Active + 1	0	Active + 1	Destroy 1 year after resolution or dismissal		
Family Medical Leave		Records relating to approved requests for leave under FMLA. Retain 3 years after leave has ended or employee separates. Destroy 29 CFR 825.500		Active + 3	0	Active + 3	Destroy 3 years after leave has ended or employee separates		
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/22	Department Head or Cabinet Secretary Approval (Print) Mrs. Anita L. Krail		
Signature 		Signature 		Signature 		Signature 			





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section HUMAN RESOURCES-PERSONNEL					Effective Date July 1, 2022		Schedule No. HR-22-01		Page 3 of 3	
Records Series Title		Description			Retention Period (years)			Final Disposition		
					Office		Storage		Total	
I-9		Verification of the legal authority to work in the United States. Must be maintained by employers for all paid staff. Retain for 3 years after hire or 1 year after separation, whichever is later. 8 CFR 274a.2 b(2)(1)(A)			Hire date + 3		0		Hire date + 3	
Workman's Compensation Claim		Claims filed relating to on the job injuries for diocesan employees. May include, incident report, copy of claim, correspondence. Retain 5 years after claim is made. Destroy La. RS 23: 14			3		2		5	
Destroy 3 years after hire date or 1 year after separation whichever is longer										
Destroy 5 years after claim is made										
Date	Chancellor Approval (Print)	Date	Canonical Counsel Approval (Print)	Date	Diocesan Attorney Approval (Print)	Date	Department Head or Cabinet Secretary Approval (Print)			
5/20/22	Mrs. Ann T. Boltin	20 May 2022	Very Rev. Jamin S. David	5/20/2022	Mr. Charles Spencer	5/23/22	Mrs. Anita L. Krail			
Signature		Signature		Signature		Signature				
										





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Human Resources- Pandemic Related Records (Temporary Series)				Effective Date July 1, 2022		Schedule No. HR-22-T		Page 1 of 1			
Records Series Title		Description		Retention Period (years)			Final Disposition				
				Office	Storage	Total					
Covid Exposure		Records of diocesan employees who have tested positive for COVID-19 or been exposed to the virus and are quarantined. May include contact tracing, positive test results, negative test results, physician notes. Retain for 3 years from exposure and then destroy. <i>Administrative decision</i>		1	2	3	Destroy 3 years after date created				
Emergency Policies & Procedures		Policies and Procedures developed in response to an emergency or disaster. Maintain while policies/procedures are in place. Transfer to archives. <i>Administrative decision</i>		Active	1	Active + 1	Transfer to archives				
Health Screenings		Records created to document health status of employees and visitors to diocesan facilities. Maintain for three years past date of creation. Destroy. <i>Administrative decision</i>		1	2	3	Destroy 3 years after date created				
Site Consultations		Recommendations made by Our Lady of the Lake Health Team regarding safety measures and precautions to take prior to reopening diocesan facilities during the Pandemic. Maintain while following recommendations. Transfer to archives for review. <i>Administrative decision</i>		Active	1	Active + 1	Transfer to archives				
Date <i>5/24/22</i>	Chancellor Approval (Print) Mrs. Ann T. Boltin		Date <i>5/24/22</i>	Canonical Counsel Approval (Print) Very Rev. Jamin S. David		Date <i>5/24/22</i>	Diocesan Attorney Approval (Print) Mr. Charles Spencer		Date <i>5/23/22</i>	Department Head or Cabinet Secretary Approval (Print) Mrs. Anita L. Krail	
Signature 		Signature 		Signature 		Signature 					




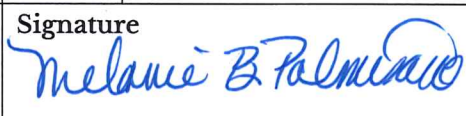
DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Catholic Schools				Effective Date July 1, 2022		Schedule No. SCH-22-01		Page 1 of 6	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Accreditation Reports		Records and reports for school accreditation process for Diocesan Schools. Retain permanently. <i>Administrative Decision</i>		Current+5	P	P	Permanent		
Administrative Files (Principal)		Records and information concerning the administration and responsibilities of the principal's office. May include information on school events, teacher evaluations, correspondence. Maintain for the duration of the principal's term. Keep in school for 10 years past term submit to diocesan Archives. <i>Administrative Decision</i>		3	7	P	Permanent submit to Archives after 10 years		
Accident Reports and Claims		Reports of student injury or accident. May include insurance claim information. Maintain for duration of student's enrollment. Destroy 2 years after student transfers, separates, or graduates. <i>Administrative Decision</i>		Active +2	0	Active + 2	Destroy 2 years after separation		
Attendance Records		Record of student attendance. Shows student's name, days present, days absent. Transfer information to student permanent cumulative record then destroy. LDOE Non Public Bulletin 741:505		Current year	0	1	Destroy at end of school year		
Advisory Board		Records for school advisory boards, may include correspondence, agendas, minutes. <i>Administrative Decision</i>		P	P	P	Permanent		
Academic Calendar		Academic year calendar of events, holidays, closures. Maintain permanently. <i>Administrative Decision</i>		P	P	P	Permanent		
Date 5/20/22	Chancellor Approval (Print) Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/2022	Department Head or Cabinet Secretary Approval (Print) Dr. Melanie Palmisano		
Signature 		Signature 		Signature 		Signature 			


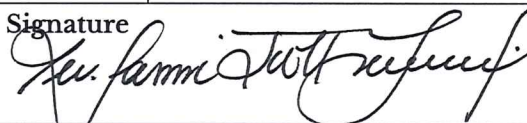

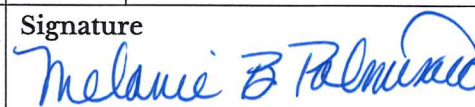
DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Catholic Schools				Effective Date July 1, 2022		Schedule No. SCH-22-01		Page 2 of 6	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
E-Rate		Records related to e-rate funding from the FCC for discounted rates on telecommunications for schools and libraries. Records may include telephone and internet bills. Retain for 10 years after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request. 47 CFR 54		Current+2	7	10 +	10 years of the latter date (see description)		
Diplomas		Unclaimed diplomas for students who have graduated, keep on file permanently. <i>Administrative Decision</i>		P	P	P	Permanent		
Doctors Excuses		Forms from medical providers documenting student's appointments and absences from school. Retain for current school year then destroy. <i>Administrative Decision</i>		Current year	0	1	Destroy at end of school year		
Federal Grants Files		Administrative files of federal programs. Includes applications, vouchers, compliance reports, etc. Retain current year plus 5. If audit is pending after retention period has elapsed retain until audit is settled. 20 CFR 1234		Current+2	3	6	Destroy		
Internal School Reports-Safety Records		Internal reports for school facilities, fire drill, inspection, boiler, etc. Retain in office for 2 years, destroy. <i>Administrative Decision</i>		Current+1	0	2	Destroy		
Date 5/20/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 29 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/2022	Department Head or Cabinet Secretary Approval (Print) Dr. Melanie Palmisano		
Signature 		Signature 		Signature 		Signature 			





DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Catholic Schools				Effective Date July 1, 2022		Schedule No. SCH-22-01		Page 3 of 6	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Inventories (classroom)		Inventories of classrooms and supplies. Retain in office 2 years, destroy. <i>Administrative Decision</i>		Current+1	0	2	Destroy		
Inventories- Equipment		Equipment inventory is kept permanently or until equipment is obsolete. Maintain record for 6 years after disposal or transfer of equipment. <i>Administrative Decision</i>		Active	6	Active+ 6	Life of Equipment+ 6 years		
Parent Signature Forms		Permission slips, handbook acknowledgements, permission to photograph, etc. Records signed by parents or legal guardians granting permissions or authority. Retain for 2 years if no incident. If incident, retain until settled and advised by Counsel. <i>Administrative Decision</i>		Current + 1	0	2	Destroy 2 years if no incident		
Required Services		Documentation prepared and maintained for submission for reimbursement from the LA Department of Education. May include employee time records, salary records. Destroy. <i>Administrative Decision</i>		Current year	3	4	Destroy		
State Government Programs		Records relating to funding for 8G, EEF, voucher and title programs. May include pupil attendance, transportation, textbooks and supplies invoices, continuing education for teachers. Retain in office until completion of audit. Destroy <i>Administrative Decision</i>		Active	4	5	Destroy 5 years after audit is complete		
Strategic / Long Range Planning		Records relating to strategic and long range planning of school. May include Master Plan, statistics, etc. Retain final plan permanently, may submit to Archives after 10 years. <i>Administrative Decision</i>		Active	P	P	Permanent		
Date 5/24/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 5/24/22	Canonical Counsel Approval (Print) Very Rev Jamin S David	Date 5/24/22	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/22	Department Head or Cabinet Secretary Approval (Print) Dr. Melanie Palmisano		
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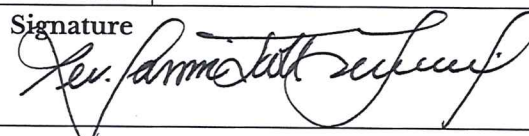

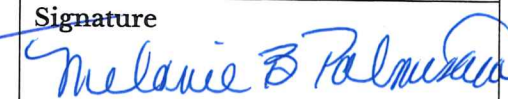
DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Catholic Schools				Effective Date July 1, 2022		Schedule No. SCH-22-01		Page 4 of 6	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
School Directories/ Handbooks		Annual listing of staff, parents, students. School and faculty handbooks which describe policy and procedures. Retain permanently, may submit to Archives after 10 years. <i>Administrative Decision</i>		Active	P	P	Permanent		
School Newspapers/Newsletters		School produced newspapers/newsletters for students, parents, faculty. Documents daily activity of school events and life. Retain permanently, may submit to Archives after 10 years. <i>Administrative Decision</i>		Current year	P	P	Permanent		
School Property and Maintenance File		Records relating to property and maintenance of school facility. May include blueprints, specs, asbestos abatement plan, gas and pipeline information, pest control, etc. Retain permanently. <i>Administrative Decision</i>		Active	P	P	Permanent		
Student Cumulative Files		Records relating to student's enrollment in school. May contain registration and enrollment forms, birth certificates, sacramental records, educational evaluations, report cards, accommodation plan, transfer records, accident reports, athletic forms, contact forms. Maintain as long as student is enrolled in the school, destroy 2 years after separation, transfer, or graduation. Return sacramental certificates, birth certificates, immunization records to parents upon separation, transfer or graduation. <i>Administrative Decision</i>		Active	1	Active +2	Destroy 2 years after student has transferred, separated, graduated.		
Date 5/24/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S. David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/2022	Department Head or Cabinet Secretary Approval (Print) Dr. Melanie Palmisano		
Signature 		Signature 		Signature 		Signature 			


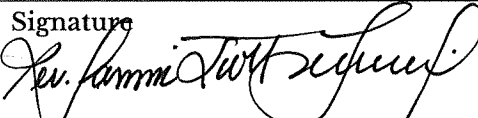

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Catholic Schools				Effective Date July 1, 2022		Schedule No. SCH-22-01		Page 5 of 6	
Records Series Title		Description		Retention Period (years)			Final Disposition		
				Office	Storage	Total			
Student Cumulative Record		Cumulative record of student's progress in school, contains name, contact information, date of birth, grades, attendance count, standardized test scores, schools attended, student activities, date of graduation. Retain permanently. LDOE Non Public Bulletin 741:505		P	P	P	Permanent		
Student Health Record		Record of student's health, must be maintained for each student pre-kindergarten through twelfth grade. May be destroyed upon separation, transfer or graduation. Return immunization record to parent/legal guardian. LDOE Non Public Bulletin 741: 519		Active	0	Active	Destroy upon student graduation.		
Student Sign in/ Sign Out Sheets		Record of students arriving and departing outside designated drop off and dismissal times. Includes extended day records. <i>Administrative Decision</i>		Current year	0	0	Destroy at end of school year		
Student Financial File		Records related to tuition payments, tuition assistance, Black and Indian Mission grants, etc. Maintain for duration of enrollment. Destroy when student transfers, separates, or graduates, <i>Administrative Decision</i>		Active	0	Active	Destroy		
Date 5/24/22	Chancellor Approval (Print) Mrs. Ann T. Boltin	Date 20 May 2022	Canonical Counsel Approval (Print) Very Rev. Jamin S David	Date 5/20/2022	Diocesan Attorney Approval (Print) Mr. Charles Spencer	Date 5/23/2022	Department Head or Cabinet Secretary Approval (Print) Dr. Melanie Palmisano		
Signature 		Signature 		Signature 		Signature 			

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Catholic Schools				Effective Date July 1, 2022		Schedule No. SCH-22-01		Page 6 of 6	
Records Series Title		Description			Retention Period (years)			Final Disposition	
					Office	Storage	Total		
Teacher/Contract Staff Personnel Files		Personnel files for Professional Contract Staff employed for the school. May include evaluations, contracts, payroll information, application, resume, start and end dates of employment. Maintain for duration of employment- transfer to Archives 10 years after separation. <i>Administrative Decision</i>			Active	10	P	Permanent transfer to Archives 10 years after separation	
Yearbooks Commemorative Booklets		Yearbooks chronicle the years' attendees, staff, events, club. Maintain 2 copies and digital file (if applicable) permanently. <i>Administrative Decision</i>			P	P	P	Permanent	
Date	Chancellor Approval (Print)	Date	Canonical Counsel Approval (Print)	Date	Diocesan Attorney Approval (Print)	Date	Department Head or Cabinet Secretary Approval (Print)		
5/20/22	Mrs. Ann T. Boltin	20 May 2022	Very Rev. Jamin S. David	5/20/2022	Mr. Charles Spencer	5/23/2022	Dr. Melanie Palmisano		
Signature		Signature		Signature		Signature			
									

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section EARLY LEARNING CENTERS - Addendum to SCHOOLS				Effective Date Nov. 7, 2023		Schedule No. SCH-23-01		Page 1			
Records Series Title		Description		Retention Period (years)			Final Disposition				
				Office	Storage	Total					
Daily Attendance Records (Sign in Sheets for children, staff and visitors)		A daily attendance record for children shall be maintained and shall include the first and last name of the child, their arrival and departure times and first and last name of person to whom they are released. Daily attendance shall also be kept for ELC staff, independent contractors, and all visitors to include their first and last names, arrival and departure times, purpose of visit (if required) and name of staff member accompanying them (if applicable/required) LAC Title 28 Bulletin 137 §1507		Current year + 2	0	3	Destroy				
Child Records and Cumulative Files		Files maintained on children enrolled in ELC, may include registration forms, emergency contact information, special concerns for child, child release information, consent for medical treatment, consent for photographs or release of information. Destroy 2 years after transfer, separation or graduation. LAC Title 28 Bulletin 137 §1515		Active	2	Active + 2	Destroy 2 years after transfer, separation or graduation				
Independent Contractors and Student Trainees		Files maintained for therapeutic professionals, extracurricular personnel, contracted transportation drivers, and student trainees. Records may include application or information form, list of duties performed while present at the center, determination of eligibility for child care purposes. LAC Title 28 Bulletin 137 §1717		Active	2	Active + 2	Destroy 2 years after separation				
Date Nov. 10, 2023	Chancellor Approval (Print) Ann T. Boltin		Date 09 Nov. 2023	Canonical Counsel Approval (Print) Very Rev. Jamin S. David		Date Nov 17, 2023	Diocesan Attorney Approval (Print) Brad Kline		Date Nov 13, 2023	Department Head or Cabinet Secretary Approval (Print) Dr. Patricia Davis	
Signature 			Signature 			Signature 			Signature Dr. Pattie Davis		