Parish Records Retention Schedule

Updated: July 1, 2012
<table>
<thead>
<tr>
<th>Record Series</th>
<th>General Description</th>
<th>Retention</th>
<th>Final Disposition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sacramental Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sacramental Registers</td>
<td>Baptism, marriage, and death registers (all required by canon law) plus any confirmation, first communion, profession of faith, record of anointings, and funeral registers. If your parish has a dedicated register documenting holy orders please contact the Chancery. Sacramental registers must always be retained as physical items. Electronic copies in LOGOS are allowed but cannot replace the official paper register. If you have any sacramental records that are ONLY electronic and are not recorded in the paper registers please contact the Department of Archives and Records Management.</td>
<td>Permanent</td>
<td>Registers must be stored in a safe place (usually a fire-resistant or fire-proof safe or filing cabinet) where they can only be accessed by authorized personnel. Microfilm copies of registers must also be kept confidential.</td>
</tr>
<tr>
<td>Documents Supporting Sacramental Register Entries and Corrections to Entries.</td>
<td>Copies of birth certificates, official name change documentation, sworn statements of paternity. Official adoption records must be presented to the parish prior to baptism but copies of adoption records are not kept.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Requests for Sacramental Certificates</td>
<td>Must be in writing and include signature of authorized requester</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Marriage Case Files</td>
<td>May include memoranda, notes, letters, prenuptial questionnaire (Form 1), sacramental certificates, rescripts, dispensation notifications, copy of marriage license, declarations of nullity from previous marriages, notification that counseling required by the Tribunal as a condition of granting the annulment of a previous marriage has been satisfied.</td>
<td>75 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>-------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td><strong>Administrative Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Announcement books and/or bulletins</td>
<td>Any annual report produced at the parish by any official parish organization, including the Pastoral Council and the Finance Council.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Annual Reports</td>
<td>Any annual report produced at the parish by any official parish organization, including the Pastoral Council and the Finance Council.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Correspondence, Official</td>
<td>Correspondence generated and received in the course of conducting parish business that concerns parish policy, governance, administration, legal matters, and Archdiocesan directives.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Correspondence, General Office</td>
<td>Correspondence generated and received in the course of business not related to the activities described above.</td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Election Ballots, if applicable</td>
<td>For the Parish Council and other parish organizations</td>
<td>1 year after the election</td>
<td>Destroy</td>
</tr>
<tr>
<td>Emails—See Correspondence</td>
<td>The retention schedule is the same for paper and electronic records.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant Applications, Successful</td>
<td></td>
<td>3 years after completion of the activity for which the funds were used</td>
<td>Destroy</td>
</tr>
<tr>
<td>Grant Applications, Unsuccessful</td>
<td></td>
<td>1 year</td>
<td>Destroy</td>
</tr>
<tr>
<td>Historical Materials</td>
<td>Historical booklets, scrapbooks, newspaper articles, member directories, oral histories, and any other materials that document the parish’s history.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Insurance Claims</td>
<td>Records of accident or injury</td>
<td>7 years after final settlement except in cases involving a minor. In cases involving a minor these must be kept for 7 years AND until the minor reaches the age of 19.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Insurance Policies and Riders</td>
<td></td>
<td>Permanent</td>
<td>Archives</td>
</tr>
<tr>
<td>Mass Attendance Records</td>
<td>Periodic record of attendance (numerical) at Mass during the year</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Meeting Minutes</td>
<td>Approved meeting minutes generated by the pastoral council, finance council, or any other official parish council or committee.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Parish Confraternity and Sodality Records and Financial Reports</td>
<td>Meeting minutes, rosters, and reports of the Rosary Altar Society, the Holy Name Society, etc.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Parishioner Registration and Resignation Forms</td>
<td></td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Photographs, Identified</td>
<td>Related to parish history (property, clergy, parishioners</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Photographs, Unidentified</td>
<td>Related to parish history (property, clergy, parishioners</td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Reports and Surveys Submitted to the Archdiocese</td>
<td>Annual financial report, PCIY reports (audit reports, program information reports, school information reports), chancellor’s survey for OCD, parish census update reports, cuestionario parroquial (for parishes with Hispanic ministries), personnel surveys, facilities surveys, etc.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>---------------------------------------------------------</td>
<td>-----------------------------------------------------------</td>
<td>-------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Religious Education Class Rosters (teachers and students) and Course Materials</td>
<td></td>
<td>Retain until superseded</td>
<td>Destroy</td>
</tr>
<tr>
<td>Subject Files</td>
<td>Internal memoranda, schedules, information about other organizations, etc.</td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td><strong>Personnel Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee eligibility verification forms (I-9 Forms)</td>
<td>Immigration and Naturalization Service form I-9 completed for every employee hired after 11-6-1986, verifying that the employee is legally authorized to work in the U.S.</td>
<td>Either for 3 years after the date of hire or for 1 year after employment is terminated, whichever is later.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Employee Medical Records and Exposure to Hazardous Material Records</td>
<td>Medical records are any record concerning the health status of an employee. Exposure records are a record containing information related to environmental monitoring or measuring, biological monitoring results, or any employee exposure to a toxic substance or harmful physical agent. All records related to an employee's health should be filed separate from the general personnel file and be kept strictly confidential.</td>
<td>30 years after separation of an employee.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Grievance Files</td>
<td>Any complaint filed under Justice in Employment or state or federal statutes including accusations of harrassment, retaliation, discrimination, affirmative action violations, or whistle blowing. Materials documenting the employee’s complaint and any associated documents including concilation, arbitration, or court files.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>IRS Form W-2</td>
<td>Shows gross earnings, taxes withheld, non-taxable income, etc.</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Long Term Disability Claims/Awards</td>
<td></td>
<td>10 years after final settlement of claims</td>
<td>Destroy</td>
</tr>
<tr>
<td>OSHA Citations of Penalty</td>
<td>Notifications of violations</td>
<td>Until violation has been corrected</td>
<td>Destroy</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Personnel Records File</td>
<td>The personnel file may contain any application for employment; wage or salary history; notices of commendation, warning, discipline, or termination; authorization for a deduction or withholding of pay; fringe benefit information; leave records; and employment history with the employer, including salary and compensation history, job titles, dates of promotions, transfers, and other changes, attendance records, performance evaluations, and retirement record. This file can also include the employee’s signed acknowledgment regarding receipt of the personnel handbook. See MS 181.960 for more information.</td>
<td>Retain for active employees plus 6 years after the separation of an employee. Any warning, discipline, or termination documentation should be moved to the employee’s Safe Environment Training file for permanent retention after the employee’s separation.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Recruitment and Selection Materials</td>
<td>Job announcements and ads, job postings, resumes, cover letters, applications, test scores, interview records, reference checks, etc. for those not hired.</td>
<td>2 years from date of the personnel action to which the record relates</td>
<td>Destroy</td>
</tr>
<tr>
<td>Safe Environment Training</td>
<td>Background checks, record of completed VIRTUS training, and signed Codes of Conduct. These records must be kept for both parish employees and volunteers who have unsupervised access to children. May also include warning, discipline, or termination documentation for former employees.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Supervisor's File on Employee</td>
<td>The supervisor’s file may contain any application for employment including letters of reference and transcripts; information related to the investigation of a violation of a criminal or civil statute, results of employer testing (except that the employee may see the cumulative score for the test or a section of the test), information relating to the employer’s salary system and staff planning including judgement, recommendations, plans to downsize or promote an employee or to change the employee’s job assignment, written comments or data kept by the employee’s supervisor or an executive, any portion of a written or transcribed statement by a coworker of the employee that concerns job performance or job-related misconduct. See MS 181.960 for more information.</td>
<td>Retain for active employees plus 6 years after the separation of an employee. Any warning, discipline, or termination documentation should be moved to the employee’s Safe Environment Training file for permanent retention after the employee’s separation.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Unemployment Claims/Compensation</td>
<td>Claims for unemployment</td>
<td>2 years after claim resolution</td>
<td>Destroy</td>
</tr>
<tr>
<td>Worker’s Compensation</td>
<td>Reports and correspondence dealing with injuries, including first report of injury and worker’s compensation claims. If infectious disease retain 30 years. These should be kept separate from the personnel file.</td>
<td>20 years after the separation of an employee</td>
<td>Destroy</td>
</tr>
<tr>
<td>Year End Payroll Registers (also called employee earnings reports or annual payroll history)</td>
<td>For each employee. Includes name, address, date of birth, occupation, rate of pay, compensation earned each pay period</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>Financial Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Receivable Documentation</td>
<td>Record of all accounts of monies owed to the parish. Generally consists of billings issued to parishioners, private organizations or other agencies or employees for authorized services or supplies. Includes receipts showing monies received.</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Accounts Payable Documentation</td>
<td>Record of all accounts of monies owed to other parties by the parish. Generally consists of purchase requisition, purchase orders, bills, invoices, check vouchers, payment authorizations, reports of receipt of goods or services, and shipping tickets.</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Audit Reports (if available) and/or Review Reports</td>
<td></td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Banking Records</td>
<td>Bank statements, cancelled checks, check registers, deposit slips, debit and credit notices, reconciliations, notices of interest earned, etc.</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Charitable gaming</td>
<td>A record must be kept on each occasion when a parish conducts gambling, including bingo. The record must include gross receipts, quantities of free plays if any, expenses, prizes, and gross profit. Winning pull tab tickets of more than $50, along with the name of the winner, must be kept. Refer to Minnesota Statute 349.19 for detailed information.</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Donation Records</td>
<td>Special or large ($1,000 or more) donations of parish property. Includes stained glass windows, altar, bell. Records name of donor and specifies which item they contributed toward.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Investment Records</td>
<td></td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>General Ledger Year-End Summary</td>
<td>A general ledger is a master set of accounts that summarizes all financial transactions within the parish. Year-end summary reports include debit, credit, and balance amounts per account; budget, fund, and department number tables; and totals for funds and accounts.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Loan Files</td>
<td>Mortgages, receipts, payment schedules</td>
<td>7 years after the loan is repaid</td>
<td>Destroy</td>
</tr>
<tr>
<td>Loan Files, proof of final payment</td>
<td>Document showing that a loan has been paid off</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Offering Envelopes</td>
<td></td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Parishioner Contribution Records</td>
<td>Record of contributions made by each individual giver. Shows amount, date, year's total. It is a best practice to note whether the donation was cash or check and to record the check number.</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Pledge Cards</td>
<td></td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Quotes</td>
<td>Quotes received for products and services</td>
<td>1 year after receipt</td>
<td>Destroy</td>
</tr>
<tr>
<td>Special Collections Records</td>
<td>Records of special collections taken at the parish</td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Tax Exemption Records</td>
<td>Certificates, correspondence</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Tax Returns</td>
<td>State and federal, signed copy</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Timecards</td>
<td></td>
<td>7 years</td>
<td>Destroy</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td><strong>Legal</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Articles of Incorporation</td>
<td>For the parish and all parish organizations</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Bylaws</td>
<td>For the parish and all parish organizations</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Boundary Documents</td>
<td>Archbishop's decrees, letters, maps</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Charter</td>
<td>Charter defining the formal organization of the parish council.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td></td>
<td>May include bylaws, constitution, date of establishment, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constitutions</td>
<td>For the parish and any parish organizations</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Closed Wills, Estates, and Trust</td>
<td>Copy of will, correspondence, record of receipt, and other legal records</td>
<td>7 years after closing of probate or estate or the termination of the trust</td>
<td>Destroy</td>
</tr>
<tr>
<td>Files</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracts, other than construction</td>
<td>Record between two or more parties in which each party agrees to provide goods or services in exchange for compensation</td>
<td>Retain for 7 years after completion of terms, expiration, or cancellation</td>
<td>Destroy</td>
</tr>
<tr>
<td>Court Orders</td>
<td>Court orders that are not part of a lawsuit file</td>
<td>1 year after the action is completed</td>
<td>Destroy</td>
</tr>
<tr>
<td>Lawsuit Files</td>
<td>Any documents related to potential or realized lawsuits, including those related to employment issues such as harassment or discrimination</td>
<td>Permanent</td>
<td>Archives</td>
</tr>
<tr>
<td>Trustee Appointments</td>
<td>Copy of signed trustee appointment form</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>Construction and Property</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architectural Drawings, Blueprints,</td>
<td></td>
<td></td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Floor Plans, and Specifications</td>
<td>Permanent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asbestos abatement records</td>
<td>Permanent</td>
<td></td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Building Maintenance Records</td>
<td>Records of routine maintenance</td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Construction Files</td>
<td>Contracts, correspondence, permits, and specifications for construction of the church, rectory, convent, school and other buildings</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Real Estate Files</td>
<td>Deeds, titles, surveys, abstracts, correspondence, lease agreements, and property appraisals related to the ownership, purchase, or sale of real property</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Equipment Files</td>
<td>Catalogs, instructions, warranties, maintenance manuals, inspection certificates</td>
<td>Retain until superseded or equipment is no longer owned</td>
<td>Destroy</td>
</tr>
<tr>
<td>Inventory of Sacred Parish Goods</td>
<td>Canon law requires that each parish have an inventory of ecclesiastical goods (statues, chalices, stained glass windows, etc.). See the appendix for instructions on how to complete this inventory.</td>
<td>Update continuously. Only most recent copy must be kept.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Inventory of Secular Parish Goods</td>
<td>A separate inventory of secular goods (electronics, appliances, etc) in parish buildings, including housing, should be kept for insurance purposes. See the appendix for instructions on how to complete this inventory.</td>
<td>Update continuously. Only most recent copy must be kept.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Inventory of the Pastor's Personal Goods</td>
<td>A separate inventory of personal goods (electronics, vestments, furniture, artwork, etc.) should be kept for the pastor for insurance purposes. See the appendix for instructions on how to complete this inventory.</td>
<td>Update continuously. Only most recent copy must be kept.</td>
<td>Destroy</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>-------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td><strong>Worship</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapel Blessings</td>
<td>Including related decrees and commemorative programs</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Church Dedications</td>
<td>Including related decrees and commemorative programs</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Mass Intention Records</td>
<td>Record of intentions and monetary stipends taken for these.</td>
<td>7 years and until all bequests are fulfilled</td>
<td>Destroy</td>
</tr>
<tr>
<td>Parish/Pulpit Announcements</td>
<td>These generally only have short-term value and can be destroyed once administrative value ceases. In exceptional cases, when an announcement has historic value (such as the announcement of the merger of a parish), these may merit permanent retention. If you are uncertain whether an announcement has long-term value please contact the Department of Archives and Records Management.</td>
<td>Generally keep only until administrative value ceases. In exceptional cases when these record significant changes to parish governance or policy, or other major events in the life of the parish, save indefinitely.</td>
<td>Destroy/Parish Archives</td>
</tr>
<tr>
<td>Parish/Liturgical Ministries Schedules</td>
<td></td>
<td>Until administrative value ceases</td>
<td>Destroy</td>
</tr>
<tr>
<td>Petitions to the Holy See</td>
<td></td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Special Liturgy Records</td>
<td>Records that document various special liturgical events that are unique to the parish. Consists of handouts, notes, etc.</td>
<td>Permanent</td>
<td>Parish Archives</td>
</tr>
<tr>
<td>Record Series</td>
<td>General Description</td>
<td>Retention</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>Cemeteries</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cemetery Records, legal</td>
<td>Perpetual care trust, constitution, bylaws</td>
<td>Permanent</td>
<td>Archives</td>
</tr>
<tr>
<td>Cemetery Records, general</td>
<td>Account cards (record of lot ownership and payments), annual report, approved board to trustee meeting minutes, burial cards (record of internment including name, date of burial, name of funeral director, lot number, place of death; arranged alphabetically if in paper format), burial record (record of internments including name, date of burial, name of funeral director, lot number, place of death; arranged chronologically if in paper format), contracts/agreements related to the transfer of ownership of lots, lot cards (numerical listing of lot owners and internments if in paper format), lot maps, rules and regulations, documents related to the cemetery dedication.</td>
<td>Permanent</td>
<td>Archives</td>
</tr>
<tr>
<td>Cemetery Records, other</td>
<td>For cemetery records not specified above (personnel records, insurance records, correspondence, etc.) follow the parish retention schedule. Call the Department of Archives and Records Management with specific questions.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix A

Sample Sacramental Certificate Request Form

St. Joseph’s Catholic Parish
1234 South Main Street
Minneapolis, MN 55406
(612) 471-2222

Please complete this form to the fullest extent possible
In order to protect the confidentiality of these records certificates will only be issued to the individual named on the certificates, the parent or guardian of a minor child, or a requesting parish or diocese.

No certificates are issued for genealogical purposes

Name of the person whose certificate is being requested____________________________________________________

Other names by whom this person has been known (maiden name, etc.)________________________________________

Name of the person requesting certificate___________________________________________________________________

Relationship to person whose certificate is being requested:
□ Self
□ Parent of minor child

Requesting:
□ Baptismal Certificate
□ First Communion Certificate
□ Confirmation Certificate
□ Marriage Certificate
□ Holy Orders

Date Sacrament Conferred
Date Sacrament Conferred
Date Sacrament Conferred
Date Sacrament Conferred
Date Sacrament Conferred

Requester’s Contact Information:
Street Address_________________________________________________________________________________________
City______________________________________State_______________________Zip________________
Daytime Phone Number_______________________________________________________________

I certify that I have read the above information and that I am requesting my own certificate or that of my minor child.

Signature_______________________________________________________________________________________________
Anexo A

Modelo de solicitud de Certificados Sacramentales

St. Joseph’s Catholic Parish
1234 South Main Street
Minneapolis, MN 55406
(612) 471-2222

Por favor complete este formulario lo más completo que le sea posible.

Para poder proteger la confidencialidad de esos expedientes, los certificados sólo le serán extendidos: a la persona cuyo nombre aparece en el certificado, o a sus padres o al tutor si se trate de un(a) menor de edad, o bien a la parroquia o diócesis que lo solicitare.

No se extienden certificados con el objeto de dar a conocer antecedentes genealógicos

Nombre de la persona que aparece en el certificado que se solicita ____________________________________________________________________________

Otros nombres que esa persona hubiere usado u otros nombres con los que se le conoce (apellidos de soltero(a), etc.)______________________________________________________________

Nombre de la persona que solicita el certificado ______________________________________________________

Relación que tiene con la persona cuyo certificado se solicita:
- Para usted mismo(a)
- Padre o madre de el (a) menor de edad

Solicito:
- □ Certificado de Bautizo ____________________________________ Fecha en que se confirió el sacramento
- □ Certificado de la Primera Comunión                      Fecha en que se confirió el sacramento
- □ Certificado de Confirmación                            Fecha en que se confirió el sacramento
- □ Certificado de Matrimonio                              Fecha en que se confirió el sacramento
- □ Órdenes Sagradas                                       Fecha en que se confirió el sacramento

Información de la persona que solicita la información:
Dirección _________________________________________________________________________________________
Ciudad __________________________________ Estado _____________________ Código Postal________________

Número de teléfono durante el día_______________________________________________________________

Certifico que he leído la información que aparece arriba y que estoy solicitando mi certificado o el de mi hijo(a) quien es menor de edad.

Firma ___________________________________________________________________________________________
INFORMATION FOR THOSE SEEKING SACRAMENTAL RECORDS

Below is a brief summary of Archdiocesan policies regarding sacramental records and research requests. If you or a researcher have any questions about this information, please don’t hesitate to contact the Office of Archives and Records Management at: records@archspm.org. We are happy to help.

Requesting Sacramental Certificates

All requests for Sacramental Certificates (official documents attesting to a sacrament having been conferred – not issued for family history purposes) should go to the parish that holds the original sacramental record book. The requester must be an authorized recipient as defined below. In the case of parishes that have merged, the records reside with the receiving parish. A list of the location of records for merged parishes can be found on the Archdiocese website at http://www.archspm.org/resources_documents/location-records-merged-parishes/.

Authorized recipients include:

- The individual named in the record (if over age 18 or an emancipated minor).
- A parent or legal guardian of the individual (if the individual is under 18).
- Officials of the Archdiocese of Saint Paul and Minneapolis, other dioceses, or of parishes of the Archdiocese or of other Roman Catholic dioceses.
- Other parties as designated or permitted by court order, subpoena, summons, or state or federal statute.

Sacramental records are not public records. Parishes do not provide sacramental information for genealogy research, nor are sacramental certificates issued for that purpose.

Requesting Genealogical Information/Family History Research

All sacramental research for genealogy is done centrally by archives staff at the Catholic Center. Any requests for sacramental records for genealogy purposes should be referred to the Archdiocese online request form: http://www.archspm.org/research

Only records 100 years old or older are available for genealogy research; any sacramental records created more recently than that are restricted to the authorized recipients listed above.

More information about this kind of research can be found in our FAQs at: http://www.archspm.org/resources_articles/faqs-regarding-sacramental-records/.
Appendix C

Inventory of Sacred Goods--PARISHES

In order to comply with Canon 1283 each parish should maintain an inventory of the sacred objects in its possession including the altar, linens, sacred vessels, statues, stained glass windows, vestments, stations of the cross, tabernacles, holy water and baptismal fonts, and furnishings such as pews and kneelers. You may compile this information in any format. The example below was created using Microsoft Word. The inventory should include:

- A basic description of the object
- A color photo of the object
- The object’s dimensions
- Manufacturer of the object (if known)
- Age of object (if known)
- Material
- Value (if known)
- Physical condition of object (excellent, very good, good, satisfactory, poor)
- Name of donor (if known)
- Owner

Example:

**Gold Monstrance with Case**

Dimensions: 20 inches tall, 3-inch face
Manufacturer: Lohmann Company of St. Paul, MN
Age of object: 1980
Material: Gold plated brass. The black leather case is lined in purple felt and has a white felt cover for the monstrance.
Value: $500 (appraised by St. Patrick’s Guild, St. Paul, 2012)
Condition: Good. It is missing the luna but a replacement can be obtained.
Name of Donor: Donor unknown
Owner: Cathedral of St. Paul
Appendix D

Inventory of Secular Goods--PARISHES

For insurance purposes each parish should maintain an inventory of the secular objects in its possession. A list of typical objects owned by most parishes is below. Your parish will not have every item on this list and, conversely, your parish may have items of value not listed here. You should tailor the inventory to reflect the items owned by your parish. **This inventory should only contain the items that belong to the parish, whether they are located on the parish campus or at a residential location owned by the parish.** A separate inventory should be created for items that are the personal property of the priests or members of religious orders assigned to the parish. The inventory should be as complete as possible but it is especially important to include items of significant monetary value.

There are **two options** for creating this inventory:

1) You may create a video tape and narrate the needed information about each object (make, model, serial numbers, value, etc.). If you choose to make a video be sure that you have ongoing access to whatever equipment and software is needed to play it back.

2) Alternately, you may compile a written inventory that contains the information specified below. Written inventories may take more time to compile but are easier to update and, if printed, do not require any special equipment to access. The example below was created in Microsoft Word.

Whether you create a video or a written inventory you should keep a copy off-site.

The inventory should include the following information, when applicable, about each item:

- A basic description of the item
- A color photo of the object (not necessary if you are doing a video tape)
- Dimensions of the object
- Manufacturer’s Name
- Model Number
- Serial Number
- Age or item/Date of Purchase
- Material of Object
- Value
- Physical Condition (excellent, very good, good, satisfactory, poor)
- Whether the receipt is on file
Example:

Parish Office Laptop

![Parish Office Laptop](image)

Dimensions: 18.4 inch screen
Manufacturer: Acer
Model: Aspire 8920 Gemstone
Serial Number: PTS88888888ADM55
Date of Purchase: 2008
Material of Object: Not applicable
Value: Original cost $1,298
Physical Condition: Good. Still works but processor is slow.
Receipt: Original receipt filed in “receipts” folder in parish office; a scan of receipt is on the shared drive in the “receipts” folder

Catholic Mutual recommends that the following types of items be included in your inventory. Your list will look different depending on the particular objects your parish owns.

**Church Office**
- Computer(s)
- Printer(s)
- Copier(s)
- Scanner(s)
- Fax machine
- Answering Machine
- Phones
- Camera
- Camcorder

**Church Library**
- Books (list the approximate number and note any titles of value individually)
- Computer(s)
- CDs
- DVDs
- Software

**Kitchen/Social Hall**
- Dishwasher
- Refrigerator
- Freezer
- Mixer
- Blender
- Cookware
- Serving Ware
- Pitchers
- Coffee Urns/Carafes
- Glassware
- Tables
- Tea Sets
- China

**Maintenance Room/Mechanical**
- HVAC Systems
- Boiler/Furnace
- Hot Water Heater
- Air Conditioning

**Church and Rectory Building Exterior**
- Roof
- Windows
- Parking Lot

**Church and Rectory Building Interior**
- Carpet
- Hardwood Flooring

**Rectory, General (include only items belonging to the PARISH, not the pastor)**
- TV
- Computer(s)
- Stereo
- DVD player
- VHS player
- Video Game System
- Video Games
- Answering Machine
- Camera
- Camcorder
- Clocks
- Washer
- Dryer
- CDs
- DVDs
- Books
- Exercise Equipment
- Air Conditioner
- Vacuum Equipment
- Lights/Light fixtures
- Window Treatments
- Wall Hangings/Pictures
- Vases
- Dining Room Tables and Chairs
- Entertainment Center/Wall Units
- End Table/Coffee Table
- Sofa
- China
- Serving Dishes
- Glassware
- Artwork

Rectory Bedroom (include only items belonging to the PARISH, not the pastor)
- Bed
- Dressers/Chests
- Night Stands
- Paintings
- Wall Hangings
- Statues
Garage/Basement/Shed/Porch (include only items belonging to the PARISH, not the pastor)

- Furniture
- Bicycles
- Boat
- Ski Equipment
- Golf Bag and Clubs
- Fishing Gear
- Other Sports Equipment
- Trailers
- Lawn Mower
- Snow Blower
- Wheelbarrow/Other Garden Tools
- Ladder
- Carpentry Tools/Supplies
- Holiday Decorations
- Garden Chairs
- Garden Tables
- Grill
- Planters
- Umbrellas
- Freezer
Appendix E

Inventory of Personal Goods--PRIESTS AND MEMBERS OF RELIGIOUS ORDERS

For insurance purposes each resident priest or member of a religious order assigned to a parish should maintain an inventory of the objects in his possession. A list of typical objects owned by most clergy is below. Your will not have every item on this list and, conversely, you may have items of value not listed here. You should tailor the inventory to reflect the items you personally own. This inventory should only contain the items that belong personally to you or to your religious order; a separate inventory should be created for items that are the property of the parish. The inventory should be as complete as possible but it is especially important to include items of significant monetary value.

There are two options for creating this inventory:

1) First, you may create a video tape and narrate the needed information about each object (make, model, serial numbers, value, etc.). If you choose to make a video be sure that you have ongoing access to whatever equipment and software is needed to play it back.

2) Alternately, you may compile a written inventory that contains the information specified below. Written inventories may take more time to compile but are easier to update and, if printed, do not require any special equipment to access. The example below was completed in Microsoft Word.

Whether you create a video or a written inventory you should keep a copy off-site.

The inventory should include the following information, when applicable, about each item:

- A basic description of the item
- A color photo of the object (not necessary if you are doing a video tape)
- Dimensions of the object
- Manufacturer’s Name
- Model Number
- Serial Number
- Age or item/Date of Purchase
- Material of Object
- Value
- Physical Condition (excellent, very good, good, satisfactory, poor)
- Whether the receipt is on file
Example:

Flat Screen TV

Dimensions: 52-inch screen
Manufacturer: Mitsubishi
Model: LT-52144
Serial Number: M65408
Date of Purchase: 2008
Material of Object: Not applicable
Value: Paid $1,660
Physical Condition: Satisfactory. There is a faded area on right side of screen that leaves after about 20 minutes.
Receipt: Paper copy of receipt not kept but a record of this purchase is available via my Amazon.com account.

Catholic Mutual recommends that the following types of items be included in your inventory. Your list will look different depending on the particular objects you personally own. If you have any questions regarding your specific inventory please contact the Department of Archives and Records Management.

Church (items owned personally by the pastor or members of the religious order)
- Chalices
- Vestments (chasubles, albs)
- Paintings
- Statues

Office
- Computer
- Computer Chair
- Printer
- Phones
- Camera
- Camcorder
- Tablet Computer
- Laptop
- Books (list approximate number and note any titles of value individually)
- CDs
- DVDs
- Software
- Lamps
- Decorative Items

**Rectory, General**
- TV
- Computer(s), including laptops and tablets
- Stereo
- DVD Player
- VHS Player
- MP3 player/IPod
- Video Game System
- Video Games
- Answering Machine
- Camera
- Camcorder
- Clocks
- Washer
- Dryer
- CDs
- DVDs
- Books
- Exercise Equipment
- Air Conditioner
- Vacuum Equipment
- Lights/Light fixtures
- Window Treatments
- Wall Hangings/Pictures
- Vases
• Dining Room Tables and Chairs
• Entertainment Center/Wall Units
• End Table/Coffee Table
• Sofa
• China
• Serving Dishes
• Glassware
• Collections (stamps, coins, etc.)
• Artwork

Rectory Bedroom
• Bed
• Dressers/Chests
• Night Stands
• Jewelry (include rings, watches, necklaces, pins)
• Paintings
• Wall Hangings
• Statues

Garage/Basement/Shed/Porch
• Furniture
• Bicycles
• Boat
• Ski Equipment
• Golf Bag and Clubs
• Fishing Equipment
• Other Sports Equipment
• Trailers
• Lawn Mower
• Snow Blower
• Wheelbarrow/Other Garden Tools
• Ladder
• Carpentry Tools/Supplies
• Holiday Decorations
• Garden Chairs
• Garden Tables
• Grill
• Planters
• Umbrellas
• Workbench
• Freezer