

LENGTH OF TIME TO KEEP DATA IN FILES
for
Religious Education Programs
(revised 2015)

STUDENT RECORDS

I. KEEP INDEFINITELY IN INACTIVE FILE

Permanent Cumulative Card **(If computerized, a backup disk is required)**
Incident Report Forms

II. KEEP VARIED TIMES

Student Attendance & Yearly Progress Sheets - 1 yr. after recorded on Cum Folder
Medication Records (if any) - 5 years after departure from the program
Custody Papers - only while student is enrolled
Acceptable Use Agreement (computers) - 3 years from departure of program
Promotions/Media Release Form - 3 years from departure of program

PARISH CATECHETICAL LEADERS (PCL) / CATECHISTS RECORDS

I. GROUP FILES - Keep Indefinitely

On-going List of Catechists / PCLs and Years of Volunteering at parish
Sexual Misconduct form – signed and dated (each year)

II. INDIVIDUAL FILES - Current & Keep 5 Years after Employment Unless Otherwise Indicated

Copy of Diocesan or Parish Application Form
References if written
Official Transcripts
Our Promise to Protect Acknowledgement Form
Religion Certification (may be kept in a group file – easily accessible)
Evaluation of Catechists, Patrol Person, Office Volunteer
Discipline or Reprimands - signed by Catechists
Attendance Record
Contracts or At Will Agreement
Emergency Information Card - during current employment

RELIGIOUS EDUCATION PROGRAM FILES

I. Keep Indefinitely

Copy of Annual Report sent to Religious Education Department Green Bay Diocese
regarding Religious Education Program (form updated 2015)
Accreditation Certificate and copy of the 7-yr. Cumulative report
Crisis Plan – updated as needed
List of Students receiving: First Penance, First Communion, Confirmation
Calendar of the Religious Education Program
Parent/student Handbook - Historical File
Policies – accessible on line - review regularly
Historical File - Newspaper clipping, photographs, etc.
Local Board or Religious Education Committee Minutes
- 1 complete set - Historical File in Office

II. Keep Current Academic Year

Student Admission and Withdrawals

Department of Religious Education Communications - current year unless otherwise noted

III. Keep one/two years

Registration Forms - Destroy after one year

Log Books of Regular Safety Inspections of the Building - Current plus 2 yrs.

Log Books of Minor First Aid and Accidents - Current plus 1 yr.

Log Books of Student's Outside Appointments, etc. - Current plus 1 yr.

IV. Keep three years

Religious Education Staff Meeting Agendas and Minutes

Diocesan Code of Pastoral Conduct – 3 years after completion of service

V. Varied times

Permission Slips: If no incident has occurred they may be disposed of at the end of the year; if an incident occurred on the trip, keep 3 years

Lesson Plans - Destroy when superseded or obsolete

Instruction Materials - Destroy when superseded or obsolete

Record of equipment - Destroy when superseded or obsolete

Fire Drill Records - 5 years

Parent/Student Handbook - Updated Yearly

Financial Records - Budgets, Tuition, etc.- 5 years; Checks - 7 years

Class Lists – Destroy after 7 years

- Please note:** some of these records might be kept by the business manager and/or finance office in the parish.

Such as

Background check

Virtus Training

Bloodborne Pathogens - Entire time of employment + 30 years

Archives Department of the Green Bay Diocese Requirements for Religious Education (2010)

Record Series Number	Description	Disposition Instructions
60	ANNUAL REPORTS FILE: Yearly reports generated for the religious education program to the Diocese.	Retrain permanently in office.
61	CLASS FILE: Class lists for Religious Education Program	Destroy in office after 7 years.
62	FAMILY RECORDS FILE: Records includes names of pearent, name and number of children, parish, sacramental history, etc.	Destroy in office when superseded or obsolete.
63	RELIGIOUS EDUCATION – VARIOUS FILE: File may include lesson plans, catalogs, instructional materials, records of equipment, schedules – classes, teachers.	Destroy in office when superseded or obsolete
64	REGISTRATION FILE: Registration forms for program.	Destory in office after 1 year.