

LOCAL CHURCH RECORDS SCHEDULE				
RECORD SERIES TITLE	DESCRIPTION	Total	Current	Archives
Accident and Injuries Records	Workers Compensation Claims Records	Settled+6	Active	NO
Accounts Payable Records	Claims and Disbursements Records, Expenses, Accounting, Bookkeeping, Paid Invoices, Finance, Purchasing	7	2	NO
Accounts Receivable Records	Membership contributions, offering records	7	2	NO
Administrative Reports	Charge Conference reports, Administrative Board reports, Council on Ministries report, or administrative council reports	Permanent	2	YES
Annual Fiscal Reports	Closing of the Books Records, Financial Reports, Balance Reconciliation Records, State Accounts Reports	Permanent	4	YES
Architectural Drawings, Blueprints, and Maps		Permanent		YES
Audit Records		Permanent	4	YES
Bank Deposit Books		7	2	NO
Bank Deposit Slips		3	3	NO
Bank statements		7	3	NO
Benefits Policies and Procedures Records		Permanent	Active	YES
Bequest and Estate papers	wills, gift agreements, bequests	Permanent		As Necessary
Budget Records	Annual Budget	Permanent	4	YES
Bulletins	Sunday worship bulletins, special local church occasion bulletins	Permanent	2	YES
Bylaws		Permanent	Active	YES
Cancelled Checks	Cashed Checks	7	1	NO
Certificates of Deposit, Canceled		3	3	NO
Committee Records	Local church committee records	Permanent	4	YES



LOCAL CHURCH RECORDS SCHEDULE				
RECORD SERIES TITLE	DESCRIPTION	Total	Current	Archives
Contracts	repairs, maintenance, lease agreements, loans	4 - service contracts 6 - Repairs, Lease, Loans Permanent - new construction	4	NO - expect for those going to Archives
Correspondence - subject	Correspondence on special or topic interest	permanent	Active	YES
Correspondence - transitory	Routine correspondence	1	1	NO
Deduction Authorization Records	Deductions Input List	Active + 4	Active	NO
Deeds	Deeds, Conveyances, Covenants, easements	Permanent		As Necessary
Directories		Permanent	Current	YES
Employment Eligibility Verification Forms		Active +1 (3 yrs Min.)	Active	NO
Employment Policies and Procedures Records	Employment Policies	Permanent	Active	YES
Grievance Records		Active +3.	Active	NO
Insurance Policies		Permanent	Active	YES
Insurance Election Records, Employees		employment +6	Active	NO
Inventories of Property and Equipment		Until superseded	Active	Transfer to Archives for Review
Invoices		7 (except for major construction)	3	NO (transfer major construction series to Archives)
Membership records	Membership register, baptisms, marriages, transfers	Permanent		YES



LOCAL CHURCH RECORDS SCHEDULE				
RECORD SERIES TITLE	DESCRIPTION	Total	Current	Archives
Newsletters	Church newsletters, UMW, UMM, UMYF and other church group's newsletters	Permanent	2	YES
Pay Authorization Records		5	2	NO
Personnel Records	Personnel Files	Active+7	Active	NO
Property Files	deeds, title papers, repair history, permits, lease agreement	Permanent		As Necessary
Purchase Orders		7	3	NO
Real Estate Surveys	surveys, plot plans and related correspondence	Permanent		As Necessary
Rejected Applications	Rejected and Incomplete Employment Applications	2	1	NO
Search Records-accepted		Active+7	Active	NO
Search Records - all others		5	1	NO
Shipping and Freight Records		3	3	NO
Staff Meeting Records		Permanent	4	YES
Tax-Exempt Certificates	Certificates and Form 990	Permanent		As Necessary
Tax Returns		7	5	NO
Tax Withholding Authorization Records		Active + 5	Active	NO
Time Sheets		3	3	NO
Travel Records		5	1	NO