

Community of Christ - Records Retention Schedule

<i>Department / Subdepartment</i>			<i>Active Retention</i>	<i>Final Disposition</i>	<i>Media</i>	
<i>Record Series Number</i>	<i>Record Series Title</i>	<i>Record Series Description</i>	<i>Total Retention</i>		<i>Production Application Name</i>	<i>Vital Record</i>
Canada						
CAN.0001	<i>Audit Reports</i>	Audit reports for the Canadian jurisdiction	Fiscal Year Fiscal Year + 15	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>				<i>Revision Date:</i>
CAN.0002	<i>Bank Statements</i>	Statements from banks showing transactions against each account, plus reconciliations used to ascertain the accuracy of the account by statement period. Includes cancelled checks drawn on the accounts, and other supporting	Fiscal Year Canada	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>				<i>Revision Date:</i>
CAN.0003	<i>Cancelled Cheques</i>	Images or copies of cheques that have been processed by banks	Fiscal Year Canada	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>				<i>Revision Date:</i>
CAN.0004	<i>Cheque Stubs and Registers</i>	Cheque stubs or registers used to validate and reconcile expenses	Fiscal Year Canada	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>				<i>Revision Date:</i>
CAN.0005	<i>Contributor Receipts</i>	Contributor receipts showing contribution information	Fiscal Year Fiscal Year + 3	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>				<i>Revision Date:</i>

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CAN.0006	<i>Correspondence - Administrative</i>	Communication records of an administrative nature in the form of letters, e-mails, inter-office memos, etc. <i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>	Permanent Permanent		Paper / Electronic	
CAN.0007	<i>Correspondence - Financial</i>	Communication records of a financial nature in the form of letters, e-mails, inter-office memos, etc. <i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>	Fiscal Year Fiscal Year + 3	Destroy	Paper / Electronic	
CAN.0008	<i>Historical Reports</i>	Includes historian's annual and cumulative reports for the jurisdiction, correspondence, newsletters, and photographs <i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>	Permanent Permanent		Paper / Electronic	Yes
CAN.0009	<i>Journals</i>	Records showing adjustments to entries in the general ledger and other subsidiary books of account; may include an Orange book or similar item <i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>	Permanent Permanent		Paper / Electronic	Yes
CAN.0010	<i>Minutes</i>	Official copies of meeting minutes <i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>	Permanent Permanent		Paper / Electronic	
CAN.0011	<i>Monthly Contribution Reports</i>	Monthly reports showing contributions <i>Interviewee:</i> Jim Poirier, Bishop of Canada <i>Notes:</i>	Fiscal Year Fiscal Year + 2	Destroy	Paper / Electronic	

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<i>Record Series Number</i>	<i>Record Series Title</i>	<i>Record Series Description</i>	<i>Total Retention</i>		<i>Production Application Name</i>	
CAN.0012	<i>Offering Envelopes</i>	Envelopes used for offerings	Fiscal Year Fiscal Year + 2	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada	<i>Notes:</i> Retention periods are in additional to the records created during the current fiscal year			<i>Revision Date:</i>
CAN.0013	<i>Paid Invoices and Purchase Receipts</i>	Records showing the payment of invoices for goods and services by the church	Fiscal Year Fiscal Year + 7	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada	<i>Notes:</i>			<i>Revision Date:</i>
CAN.0014	<i>Real Estate Records</i>	Copies of legal documents, correspondence, building project files, and all supporting documentation	Permanent Permanent		Paper / Electronic	Yes
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada	<i>Notes:</i> Retain a copy, original sent to Guelph office			<i>Revision Date:</i>
CAN.0015	<i>Tax Reports "T3010A"</i>	Registered charities information return forms	Fiscal Year Fiscal Year + 7	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada	<i>Notes:</i>			<i>Revision Date:</i>
CAN.0016	<i>Financial Statements - Year End</i>	Statements showing the financial condition of the church at various intervals	Permanent Permanent		Paper / Electronic	Yes
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada	<i>Notes:</i>			<i>Revision Date:</i>
CAN.0017	<i>Oblation Records</i>	Records of church members requesting financial assistance, Includes personal and financial information, intake form, Case notes, invoices	Current + 10	Destroy	Paper / Electronic	
		<i>Interviewee:</i> Jim Poirier, Bishop of Canada	<i>Notes:</i>			<i>Revision Date:</i>