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Issued Date: 10/15/2025 **Number:** 204

Subject: Records Retention Policy

Scope: ☑ Archdiocese ☑ Parishes ☑ Schools

Reference: Records Retention Schedule

Archbishop Signature:

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Purpose

To establish an institution-wide records management program to retain, secure, and dispose of <u>Records</u> in accordance with operational needs, legal requirements, and historical considerations.

Policy

I. OWNERSHIP OF RECORDS

- 1) All <u>Records</u> are solely the property of the <u>Archdiocese</u> or the <u>Parish</u> or <u>School</u> and will be maintained in compliance with the Archdiocesan Records Retention Schedules, as well as civil laws and regulations, and canon law.
- 2) Retention decisions will be made based on the content of the <u>Record</u>, not its paper or electronic format. A <u>Record</u> must be accessible and retrievable for the stated retention period.

II. RECORDS RETENTION SCHEDULES

- 1) The Records Retention Schedules are proposed by the Department of Archives and Records Management, approved by the Chief Operating Officer and administered by the Department of Archives and Records Management.
- 2) The Records Retention Schedules classify <u>Records</u> and set forth the retention periods for each classification.
- 3) The current Records Retention Schedules are posted on the Archdiocesan website along with this policy.
- 4) Records are not accessed, shared, removed, destroyed, stored, or transferred into another media format, or otherwise disposed of, except in compliance with Archdiocese, Parish, or School policies.

III. CONFIDENTIALITY

1) Confidential <u>Records</u> are kept separate from public records for privacy purposes. Confidential <u>Records</u> include sacramental <u>Records</u>, clergy files, personnel files, student <u>Records</u>, and <u>Records</u> of individual financial contributions to, as well as financial <u>Records</u> of, the <u>Archdiocese</u>, <u>Parish</u>, or <u>School</u>.

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2	2)	When compiling and publishing statistical information from <u>Records</u> , great care will be taken to preserve the anonymity of individuals.