

Diocese of Houma – Thibodaux Records Retention Schedule

Department/Section: Insurance Records		Effective Date 8/1/2018		Schedule No. 5	Page
Records Series Title	Description	Retention Period			Final Disposition
		Active	Inactive	Total	
Accident or Claim Report (Suspense)	Accident or Claim Report (Suspense): claims that are not immediately pursued. <i>Administrative Decision</i>	Claim is filed.	Case is declared inactive.	Active + 1	Destroy one year after claim is declared inactive.
Appraisals	Appraisals – a report on that estimates the value of a property including photographs of property. <i>Administrative Decision</i>	2	3	Permanent	Permanent
Certificates of Insurance	Certificates of Insurance - a document issued by an insurance company/broker that used to verify the existence of insurance coverage under specific conditions granted to listed individuals. More specifically, the document lists the effective date of the policy, the type of insurance coverage purchased, and the types and dollar amount of applicable liability. <i>Administrative Decision</i>	0	0	Permanent	Permanent
Claims-Loss History	Claims-Loss History – may information on claims submitted by location under General Liability, Property, or Workers' Compensation Coverage. <i>Administrative Decision</i>	Date of Loss	Date Claim Closed	Maintain (10) years after close of claim	Destroy (10) years after close of claim.
Coverage Certificates/Policies	Coverage Certificates /Policies: may include all insurance coverage purchased by the Diocese. <i>Administrative Decision</i>	Coverage is in effect.	One year past renewal of policy.	Permanent	Permanent
Risk Management/Safety Inspections	Risk Management/Safety Inspections – a report that identifies potential hazards on Diocesan properties. <i>Administrative Decision</i>	2	3	5	Destroy

Department/Section: Insurance Records				Effective Date 8/1/2018		Schedule No. 5	Page
Records Series Title		Description		Retention Period			Final Disposition
				Active	Inactive	Total	
Special Events Coverage		Special Events Coverage: specialty coverage for sponsored and non-sponsored events. <i>Administrative Decision</i>		Coverage is in effect.	One year past event date.	Maintain (10) years past event date.	Destroy (10) years past event date.
Vehicles Ownership Papers		Vehicles Ownership Papers - copy of ownership papers with year, make, model, vin number and registration. <i>Administrative Decision</i>		When vehicle purchased.	When vehicle sold.	Permanent	Permanent
Date	Archivist Approval (Print)	Date	Department Head or Cabinet Secretary Approval (Print)	Date	Finance Representative Approval (Print)	Date	Law Representative Approval (Print)
8/1	Alex Gaudet	8/1/18	Melissa Robertson	8/1/18	Glenn J Landry Jr	8/15/18	Daniel J. Walker
Signature		Signature		Signature		Signature	
							