

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Legal Documents				Effective Date 12/5/2007	Schedule No. LGL-07-01	Page 1	
Records Series Title	Description	Retention Period			Total Retention		
		Office	Storage	Total			
Articles of Incorporation and Bylaws	Documentation on the formation of a corporation and its rules of operation. Retain for administrative use and then transfer to Archives.	Active + 3	P	P	Permanent		
Canon Law Revision Documents	NCCB Canon Law Commission, Pontifical Commission for Revision of the Code, documents re: revision of the Code of Canon Law (c.1981). Includes correspondence, minutes of meetings, and reports. Retain for administrative use and then transfer to Archives.	Active + 3	P	P	Permanent		
Canonical Documents	May include decrees, declarations, pronouncements. Permanent retention.	Active + 3	P	P	Permanent		
Case Files	May contain request for investigation, correspondence, subpoenas, court documents (arbitration briefs, transcripts, motions, decisions), financial statements of case, copy of requests for funds and disbursements, client documents, case summary sheet, etc. Permanent retention, submit to Archives for review.	Active + 1	P	P	Permanent		
Closed Wills, Estates, & Trust Files	Copy of will, correspondence, record of receipt, and other legal records. Permanent retention.	Active + 1	P	P	Permanent		
Contracts	Recorded between two or more parties in which each party agrees to perform services or provide goods in exchange for compensation. Retain for 10 years upon completion of terms, expiration, or cancellation. Submit to Archives for review.	Active + 10	0	10	10		
Real Estate Files	Deeds, titles, surveys, correspondence, relating to the ownership, purchase, or sale of real property. Permanent retention, transfer to Archives upon disposal of property.	Active + 3	P	P	Permanent		
Date	Archivist Approval (Print)	Date	Department Head or Cabinet Secretary Approval (Print)	Date	Finance Representative Approval (Print)	Date	Law Representative Approval (Print)
12/5/07	Ann Boltin	12/5/07	Fr. Paul Counce	12/5/07	Joe Ingraham	12/5/07	Charles Cusimano
Signature		Signature		Signature		Signature	
							