

2013-2016 EDITION

| LOCAL CHURCH RECORDS SCHEDULE | | | | |
|--|--|--------------|----------------|------------------------------|
| RECORD SERIES TITLE | DESCRIPTION | Total | Current | Local Church 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 |
| | Offering envelopes | 1 | 1 | 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 |

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| Committee Records | Local church committee records | Permanent | 4 | YES |
| 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) |

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| RECORD SERIES TITLE | DESCRIPTION | Total | Current | Local Church Archives |
| Membership records | Membership register, baptisms, marriages, transfers | Permanent | | YES |
| 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 |