

CTANA RECORDS RETENTION SCHEDULE

- In January of each year, the Facilitator will ensure that all items listed below as “scanned” have been imaged in pdf format on a CD **to be retained by the Facilitator** and the **Recorder** will ensure that all paper records that have met their retention requirement are destroyed.
- Each month, the CTANA Recorder shall ensure that all new or revised documents subject to retention are placed in secure online storage as provided in Section 12.
- In January of each year, the Recorder shall ensure that all paper records that have met their retention requirements are destroyed.

<u>ITEM #</u>	<u>RECORD TITLE</u>	<u>PAPER</u>	<u>ELECTRONIC ARCHIVES</u>	TOTAL	REMARKS		
1	Correspondence	AV			Kept only as long as needed		
2	Minutes	1 yr.	PM	PM	Kept permanently for historical value		
3	Bank Statements	1 yr.	6 yrs.	7 yrs.	Federal requirement		
4	Treasurer Reports	1 yr.	6 yrs.	7 yrs.	Federal requirement		
5	Other: Admin, Subcommittee and GSR Reports			1 yr.			
6	Fliers			AC	Kept until event has occurred		
7	Policy			US	Kept until policy is approved.		
8	Lit Orders to NAWS	AV			Kept only as long as needed		
9	Group Lit Orders	AV			Kept only as long as needed		

<u>RETENTION CODES</u>	<u>ARCHIVAL CODES</u>
AC – After closed - Terminated, Completed, Expired, Settled	A – Transfer to Completed
AV – Administratively Valuable	R – Review by Facilitator
CE – Calendar Year End	
FE – Fiscal Year End	
LA – Life of Asset	