

**Presbyterian Church (U.S.A.)  
Presbyterian Historical Society – OGA  
Schedule – March 2009**

**Presbyterian Mission Agency  
Human Resources  
Personnel Records**

<b>Record Title and Description</b>	<b>Retention</b>	<b>Disposition Instructions</b>
Advertising Request-Outside Job Advertisement Request Form	1 year	Destroy 1 year after position is filled
Employment Application – Hired	Employment + 6 years	Destroy
Employment Application – Not Hired	Retain 5 years after position has been filled.	Destroy
Grievance File (This record series is 3 years after resolution on LFUCG schedule)	5 years	Destroy 5 years after resolution, or if ongoing destroy 5 years after the end of investigation, proceeding or litigation.
Conflict of Interest Policy: Elected and Appointed Members	Term of Member + 6 years	Destroy
Conflict of Interest Policy: Staff	Employment + 6 years	Destroy
Departmental Orientation Checklist	3 years	Destroy
Dependent Change (BOP)	Active	Destroy only when information is changed or superseded or employee is terminated
Job Skills Testing Request Form	Active + 6 years	Destroy 6 years after termination of employee
Authorization Agreement for Automatic Deposits	Active + 6 years	Destroy 6 years after termination of employee or when information is changed or superseded

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Application and Proof of Claim for Disability Benefits	Active + 6 years	Destroy 6 years after disability period has ended
Attending Physician's Statement Notice and Proof of Claim for Disability Benefits	Active + 6 years	Destroy 6 years after disability period has ended
Medical Certification Statement Family and Medical Leave Request (FMLA)	Active + 5 years	Destroy 5 years after leave is denied or has ended
FMLA Initial Notice of Eligibility and Rights	Active + 5 years	Destroy 5 years after leave is denied or has ended
Retirement Savings Plan –Salary Reduction/Employer Agreement	Active + 6 years	Record copy at the BOP Destroy HR copy 6 years after termination of employment or if new agreement is executed.
Employment Eligibility Verification - I-9 Form	Active + 3 years	Destroy 3 years after termination of employment
Flexible Spending Account Enrollment Application and Deduction Authorization	Expiration + 7 years	Destroy
Request for Services of an Independent Contractor	Expiration + 6 years	Destroy
Injury Incident Report	Active + 5 years	Destroy 5 years after claim is closed
Internal Job Posting Application	1 year	Destroy applications from unsuccessful candidates one year after position is filled

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Certificate of Nonresidence	Active + 4 years	Destroy when changed or superseded
Request for Leave of Absence	Active + 2 years	Destroy 2 years after leave period has ended
Housing Allowance –Manse Allowance	Active + 7 years	Destroy
Supplemental Death Benefits Beneficiary Designation Form (BOP)	Active	Destroy after changes to beneficiary information Maintain for life of employee last copy in BOP
Mid-Year Review	Active + 6 years	Destroy 6 years after termination of employment
Annual Performance Appraisal Exempt Staff	Active + 6 years	Destroy 6 years after termination of employee
Annual Performance Appraisal Non Exempt Staff	Active + 6 years	Destroy 6 years after termination of employee
Personnel Action Request Form	Active + 6 years	Destroy 6 years after termination of employment
Status Change Form	Active + 6 years	Destroy 6 years after termination of employment
Separation Form	Active + 6 years	Destroy 6 years after termination of employment
Personnel Record- Exempt and Non-Exempt Staff – Record Copy Non-Ordained staff	Active + 6 years	Destroy 6 years after termination of employee
Personnel Record for Staff (changes to personal information)	Active	Destroy when information changes or is superseded

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Job Opportunity Posting	Active	Destroy 2 years after position is superseded or abolished
Position Description	Permanent	Retain Official Position and transfer one copy of each to the Archives in Philadelphia
Introductory Period Appraisal and Recommendations Non Exempt Status	4 years	Destroy 4 years after probation has ended or 4 years after extension of initial probation
Employee VNP/ Citrix Terms of Use Agreement	Active + 6 years	Destroy 6 years after termination of employment
Retirement Savings Plan Beneficiary Designation (BOP)	Life of Member	Destroy
Manual Time Entry Form	1 year	Destroy
Service/Salary Change Form (BOP)	Life of Member	Destroy
Introductory Period Appraisal and Recommendations Exempt Status	4 years	Destroy 4 years after probation has ended or 4 years after extension of probation
Verification of Enrollment New Student (BOP)	3 years	Destroy
Staff Development/Educational Assistance Funds/Study Leave Application	3 years	Destroy 3 years after completion of education or course
Tuition Reimbursement Application Form	3 years	Destroy
Tax Form W-4	Expiration + 7 years	Destroy

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Tax Form W-4	Expiration + 7 years	Destroy
Tax Form WH-4	Expiration + 7 years	Destroy
Working Outside of Louisville Percentage Form	7 years	Destroy
Tax Form K-4	Expiration + 7 years	Destroy
Temporary Employee Request Form	Current + 3 years	Destroy after job is completed
Term Employment Agreement	Expiration + 6 years	Destroy 6 years after contract ends
Terms and Conditions Part 2 of 2	Expiration + 6 years	Destroy 6 years after contract ends
Training and Development Course Registration/Authorization	3 years	Destroy 3 years after completion of program
Outside Job Advertisement Request	1 year	Destroy 1 year after job is filled.
Volunteer Information and Release Form	Active + 6 years	Destroy 6 years after volunteer separation
Pandemic Flu Policy	Permanent	Transfer copy of all Policies to the Archives In Philadelphia

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