THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

Use and Retention of Records and Reports—Ward or Branch (United States and Canada)

The current record-keeping materials for wards and branches are listed below, along with brief instructions for their use and retention. Distribution information, where applicable, is in italics.

After the retention period, completely destroy records and reports in such a way that the information cannot be retrieved or reconstructed. Destroy outdated, unused forms; check the date at the bottom of the form, and keep only the forms with the latest date. Destroy all previous Use and Retention of Records and Reports lists (those dated earlier than 5/07).

For general record-keeping instructions, refer to the "Records and Reports" section of the *Church Handbook of Instructions, Book 1: Stake Presidencies and Bishoprics* (2006).

Title and item number	Latest date	Use and distribution	Retention and disposition
Financial			
Annual Charitable Cash Contributions Official Tax Summary Statement (MLS*) *Member and Leader Services software	NA	A donor's final annual summary of contributions. *Give to the donor after the end of the year.*	Keep statements that cannot be distributed for the current year and the previous year. Then destroy them.
Church Unit Checking Account checks and check stubs	NA	Use checks to pay ward or branch expenses. Attach stubs to expense records.	Keep stubs and expense records for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy them.
Church Unit Financial Statement	NA	A record of checking account transactions. Use to reconcile with MLS monthly. *Receive from Church headquarters each month. Also available in MLS.*	Keep for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy.
Fast-Offering Envelope (31591)	11/92	Use to gather fast offerings from members.	Keep until worn out or until an updated version arrives. Then destroy.
Financial reports and printouts from MLS	NA	Use as indicated in MLS.	Keep for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy.
Internal Record of Purchase/Service	NA	Use to verify items charged to the ward or branch by Church departments or Distribution Services. *Receive from Church headquarters.*	Keep for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy.
Official Receipt Valid for Income Tax Purposes (MLS)	NA	A donor's final annual summary of contributions. *Give the original to the donor after the end of the year.*	Keep copies for the current year and the previous five years. Then destroy them.
Order Form (33360)	6/05	Use to order items from Distribution Services.	Keep copies for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy them.
Outstanding Checks—Annual Report (34579)	2/06	Use to report outstanding checks more than six months old. Used only in the United States. *Send to the stake or district clerk.*	Keep copies for the current year and the previous three years. Then destroy them.
Signature Card (MLS or 31623)	10/98	Use to record signatures for the ward's or branch's Church Unit Checking Account. *Send to Church headquarters.*	Keep a photocopy to identify the current signers. When there are new signers, complete and submit a new card, and destroy the old one.

Title and item number	Latest date	Use and distribution	Retention and disposition
Tithing and Other Offerings form (31592), contribution envelope (31589)	5/01, 5/92	Members use when making contributions to the Church.	Keep the forms with the donation reports for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy them with the donation reports. Destroy the envelopes after opening them.
Tithing Declaration Report for All Members (MLS)	NA	A report of members' tithing status. *Send to Church headquarters and the stake or district president.*	Keep for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy.
Travel and Telephone Reimbursement Request (31563)	10/07	Use to request reimbursement for authorized Church travel and telephone expenses from the stake or district account.	Attach to the corresponding check stubs and keep with the expense records for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy with the expense records.
Ward or Branch Financial Audit (34244)	11/06	The stake or district completes the audit twice a year and gives a copy of the report to the ward or branch.	Keep for the current year and the previous three years. Then destroy.
Historical			
Instructions for Preparing the Annual History (36388)	3/01	Use to compile and submit the ward or branch annual history. *Send the annual history to the stake or district no later than January 15 each year.* *Note:* Instructions for preparing the annual history may also be found on **www.lds.org** under **Serving in the Church > Melchizedek Priesthood > Record-Keeping and Auditing Training**.	Keep a copy of the annual history for use by leaders and members of the ward or branch.
Officers Sustained—Branch in Mission (MLS or 32303)	4/08	Prepare to be read at branch conference according to the instructions on the form. *Give to the district clerk to include in the district's annual history.*	Retain a copy as part of the branch's annual history.
Officers Sustained—Ward or Branch in Stake (MLS or 32302) (The ward and branch forms are separate in MLS.)	4/08	Prepare to be read at ward or branch conference according to the instructions on the form. *Give to the stake clerk to include in the stake's annual history.*	Retain a copy as part of the ward's or branch's annual history.
Membership			
Aaronic Priesthood Ordination Record and Certificate (MLS or 35857) (The record and certificate are separate in MLS.)	12/04	Prepare for members ordained to the Aaronic Priesthood. *Give the original certificate to the ordained member. Distribute the completed record according to the instructions on the form.*	Keep a copy of the record (or the specified copy of the record and certificate, if not using MLS) until the next audit of membership records has been completed. Then destroy.
Attendance Roll (MLS)	NA	Use to record attendance at meetings.	Keep until the Ward Quarterly Report has been submitted.
Baptism and Confirmation Certificate (MLS or 35920)	12/04	Prepare for members baptized and confirmed. *Distribute according to the instructions in MLS or the instruction booklet that accompanies the Baptism and Confirmation Record forms.*	Keep a copy until the next audit of membership records has been completed. Then destroy.

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Baptism and Confirmation Record (MLS or 35919)	6/05	Prepare for those recommended for baptism. *Distribute according to the instructions in MLS or the instruction booklet that accompanies these forms.*	Keep a copy until the next audit of membership records has been completed. Then destroy.
Child Blessing Record and Certificate (MLS or 35856) (The record and certificate are separate in MLS.)	12/04	Prepare for children being blessed. *Give the original certificate to the parents of the child who has been blessed. Distribute the completed record according to the instructions on the form.*	Keep a copy of the record (or the specified copy of the record and certificate, if not using MLS) until the next audit of membership records has been completed. Then destroy.
Melchizedek Priesthood Ordination Record and Certificate (MLS or 35858) (The record and certificate are separate in MLS.)	1/07	Prepare to recommend members for ordination to the Melchizedek Priesthood. *Send to the stake or district.*	If using MLS, keep a copy of the completed record (returned by the stake) according to the instructions on the form. Then destroy. If not using MLS, keep the specified copy of the certificate (returned by the stake) until the next audit of membership records has been completed. Then destroy.
Membership Record (MLS)	NA	The ward or branch should have one in MLS for each member living in the ward or branch.	Keep a printed copy as long as needed. Then destroy.
Recommend to Perform an Ordinance (32595)	8/01	Prepare for a worthy priesthood holder to perform an ordinance outside his home ward or branch.	Keep a copy for one year. Then destroy.
Report of Administrative Action (MLS or 32427)	2/07	Use to report a member's request to have his or her name removed from the records of the Church. *Send to the stake president (mission president, if in a mission district).*	Do not keep a copy of this form.
Request for Ordinance Information (32388)	12/91	Prepare to request information from the Church History Department about ordinances that occurred before 1985.	Keep a copy until you receive a response from the Church History Department.
Ward Quarterly Report (MLS)	NA	A compilation of member information from the ward or branch. *Send to Church headquarters within 15 days after the end of each quarter. (Receive from Church headquarters each quarter, if not using MLS.)*	Keep a copy for one year. Then destroy.
Other			
Application to the First Presidency (MLS or 35789)	2/07	Use to complete a member's application for actions that require First Presidency approval. Request from the Office of the First Presidency as needed. *Send to the stake president (mission president, if in a mission district).*	Do not keep a copy of this form.
Bishop's Order for Commodities forms: • Food and Supplies (United States) (33585) • Food and Supplies (Canada) (36996) • Clothing and Household Goods (31422)	2/05, 2/05, 10/05	Use to complete orders for food and supplies from the bishops' storehouse and orders for clothing and household goods from Deseret Industries.	Keep for the current year and either the previous three years (U.S.) or the previous five years (Canada). Then destroy.

Title and item number	Latest date	Use and distribution	Retention and disposition
Letters and notices with new instructions and policies from Church headquarters	NA		Keep until new editions of handbooks are issued or until instructed to discard the letters and notices. Then destroy.
Nonfinancial reports from MLS	NA	Use as indicated in Help in MLS.	Unless noted otherwise (in Help, for example), keep only as long as needed. Then destroy.
Report of Church Disciplinary Action (MLS or 33493)	2/07	Use to report Church disciplinary proceedings and actions. *File or submit according to the instructions on the form.*	Keep or destroy, along with all related records, according to the instructions on the form.

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