

**DIOCESE OF JOLIET**  
**SAFE ENVIRONMENT RECORDS**  
**RETENTION SCHEDULE**  
**(effective November 28, 2022)**

<b>RECORD SERIES</b>	<b>DESCRIPTION</b>	<b>MEDIUM</b>	<b>TIME</b>	<b>RETAINED</b>	<b>DISPOSAL</b>
Safe Environment Compliance (active VIRTUS users)	PGC certificates, Policies & Standards, MRT Certificates, CANTS 22, Volunteer Applications (adult and minor), background check receipts/results (fingerprint and name based)	Paper	Keep while employee/volunteer is active	Scan paper to electronic file; keep electronic file permanently	Shred
Safe Environment Compliance (active VIRTUS users)	PGC certificates, Policies & Standards, MRT Certificates, CANTS 22, Volunteer Applications (adult and minor), background check receipts/results (fingerprint and name based)	Electronic	Permanent	Keep electronic file permanently	N/A
Safe Environment Compliance (inactive VIRTUS users – includes deceased)	PGC certificates, Policies & Standards, MRT Certificates, CANTS 22, Volunteer Applications (adult and minor), background check receipts/results (fingerprint and name based)	Paper/Electronic	Immediate	Scan paper file to electronic file; keep electronic file permanently	Shred (paper)
Allegations of Misconduct <i>(NOTE: only applies to respective diocesan offices, not to local administrators)</i>	Records of allegations against clergy or laity, victim records, investigation notes, correspondence, phone logs, settlements	Paper/Electronic	Permanent	Keep paper and electronic files permanently	N/A
Audits of Safe Environment Program <i>(NOTE: this refers to annual diocesan audit conducted by USCCB)</i>	Annual audit of safe environment program, conducted by third party. Includes Children's Permission/Opt-Out, Children's Training Totals – parish and school	Electronic	Permanent	Keep electronic file permanently	N/A