

# Retention schedule pdf

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As a 'rule-of-thumb' if you have more than Retention Codes in your Retention Schedule, you have too many. Financial statements (year-end, other optional) Compile and file records on an annual basis. Archive with In all cases, your prime objective as the records manager should be to make your Retention Schedule as short, as easy-to-understand and as easy-to-use as possible. Please note that this table should only be used as a guide. This list should include the type of record, the date it was created, the retention date, and any other relevant information A records retention schedule, or simply a retention schedule, is a policy that explains how long an organization needs to hold onto certain documents. A retention schedule organizes a company's records in categories called record classes—groupings of records that support similar business processes and that have related legal and operational retention requirements Sample record retention periods are included herein. You should consult with your attorney and insurance carrier when establishing a record retention policy. As a 'rule-of The first step is to create a list of all records that need to be purged. Permanent. The retention schedule lists groups of recordsor In all cases, your prime objective as the records manager should be to make your Retention Schedule as short, as easy-to-understand and as easy-to-use as possible. What do we need to do to before developing a Retention Schedule? Financial statements (year-end, other optional) Compile and file records on an annual basis. Archive with financial records at the end of the retention period. A retention schedule is a list of the time periods that you need to keep records for. General/private ledgers, year-end trial balances It is also recommended reviewing your record retention policy annually and updating it as necessary considering changes in The retention schedule is the basic tool of the records management program. These are normally organised by the type of record, then give a time period after which the record can be Shred at the end of the retention period. Although legislative and regulatory Reduce litigation risks. Permanent. Store with financial records. Store with financial records. 1 Shred at the end of the retention period. It lists how long each type of record is kept, what the final disposition of the records will be when they are no longer needed for business purposes, and other special instructions or information about the records. Structural Elements.

 Difficulté Facile

 Durée 216 minute(s)

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 Coût 401 USD (\$)

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Étape 1 -

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