

Utah Association of Medical Staff Services

Policy/Procedure Name: Record Retention Schedule	Index: UAMSS-002
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Policy Statement:

UAMSS requires that accounting, legal, insurance and other pertinent records be retained for no less than a predetermined length of time in accordance with best practices.

Purpose:

To ensure proper back up and history of important society documents.

Procedure:

Records will be retained for a period of time as detailed in the chart below and uploaded electronically, at least annually, for ease of access by all board members:

Type of Record	Retention Period
Accounting	
Accounts Receivable/Payable Reports	7 Years
Bank Deposit Slips	7 Years
Bank Statements/Reconciliation	7 Years
Receipts	7 Years
Financial Statements (Annual)	7 Years
General Journal or Ledger	Permanent
Invoices	7 Years
Records	
Annual Report	Permanent
Bylaws	Permanent
Policies	Permanent
Minutes	Permanent

Policy Cross Reference: P&P 10	
Revision and/or Replacement Date(s): 11.17.2016; 4.16.2018; 1.12.2023	
Original Approval Date: 04.01.2015 by Rachel Smith, CPCS, 2015 UAMSS President	
Approved by: Lydia Tedtaotao 2023 UAMSS President	Date Approved: <i>1/12/2023</i>