



Child Life Certification Commission Administrative Policy and Procedure

SUBJECT: 7.0 DOCUMENT RETENTION AND DESTRUCTION POLICY

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The purpose of this policy is to ensure that CLCC maintains, retains, and disposes of electronic records in compliance with legal, regulatory, and operational requirements. This policy applies to all electronic documents created, received, or maintained by the organization. As of October 2024, CLCC maintains all records in electronic format only.

Reputable cloud-based storage platforms offering encryption, access controls, and regular backups are used to store records. Systems are reviewed on at least an annual basis to validate security and backup functionality. Access to electronic records is limited to personnel with signed confidentiality agreements and annual training and is based on roles and responsibilities to ensure data integrity and confidentiality.

Roles and responsibilities: Document owners are responsible for storing documents and records in approved systems and appropriately categorizing them. The Director of Certification is responsible for monitoring adherence to this policy, reviewing retention schedules, and, with support from technology partners, conducting annual system audits.

Records are stored indefinitely with the following minimum retention periods only if needed to free up storage space, upon which time records may be deleted.

The following minimum retention periods apply to electronic records:

Document Type	Retention Period	Storage Method
Audit Reports	7 years	Microsoft Onedrive
Certification Records <ul style="list-style-type: none"> • Eligibility requirement verification • Certification status • Exam results 	Permanent	AMS and/or CMS (Currently Association Anywhere, transitioning to iMIS & either CertBank, Heuristics Learning)

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Document Type	Retention Period	Storage Method
<ul style="list-style-type: none"> • Recertification status • Recertification requirement documentation and verification • Contact information • Disciplinary action • Appeal documentation • Communication logs 		Builder, or comparable by mid-2025)
Candidate and Certificant key materials <ul style="list-style-type: none"> • Candidate Handbook • Recertification Handbook • Code of Ethics 	Until superseded + 5 years	Microsoft Onedrive
Contracts and Agreements	7 years after expiration	Microsoft Onedrive
Employee Records	7 years after separation	Microsoft Onedrive
Exam development and administration documentation <ul style="list-style-type: none"> • Job Task Analysis Study • Content outline and exam blueprint • Item analysis reports • SME panel meeting reports • Exam statistical analysis • Standard setting • Technical reports and other psychometric documents • Exam scores and history 	Until superseded + 10 years	Microsoft Onedrive and/or Psychometric partner secure client portal
Financial Records	7 years	Microsoft Onedrive
General Correspondence	2 years	Microsoft Onedrive
Governance records <ul style="list-style-type: none"> • Charter and amendments • Bylaws 	Permanent	Microsoft Onedrive

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Document Type	Retention Period	Storage Method
<ul style="list-style-type: none"> • Other organizational documents • Governing board member lists 		
Item Bank	By item until retired + 10 years	Psychometric partner item bank storage system
Meeting Minutes <ul style="list-style-type: none"> • Governing body • SME Panels • Other committees including ethics, appeals, etc. 	5 years	Microsoft Onedrive and Basecamp for Non-profits
Policies and Procedures	Until superseded + 3 years	Microsoft Onedrive

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