

Records Retention Schedule

Louisiana State Archives—Records Management
 Louisiana Secretary of State
 Post Office Box 94125, Baton Rouge, LA 70804

SSARC-932 (09/20)

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recmgt@sos.la.gov

Agency No	Agency / Division / Section			Security	Archival	State Records Center	Vital	Indicate Use of Form	
066.000	University of Louisiana Monroe / Office of the President							<input type="checkbox"/> ORIGINAL SUBMISSION	<input type="checkbox"/> RENEWAL
Item Number	Records Series Title	Retention Period							Remarks
		In Office	In Storage	Total Retention					
1	Board of Supervisors	ACT + 8 FY	0	ACT + 8 FY	P	S	N	I	ACT = until end of FY in which created or received.
2	Board of Regents	ACT + 8 FY	0	ACT + 8 FY	P	S	N	I	ACT = until end of FY in which created or received.
3	General Correspondence	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end of FY in which created or received.
4	Legal	ACT + 5 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which matter closed.
5	President's Correspondence	ACT + 5 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
6	University Construction Files	ACT + 4 FY	PERM	PERM	P	R	N	V	ACT = until end of FY in which project completed.
Permitted Retention Period Abbreviations ACT – Active Period (when used define term in remarks column) FY- Fiscal Year (July 1- June 30) CY – Calendar Year (Jan 1 – Dec 31) AY – Academic Year (Aug 1 – July 31) FFY – Federal Fiscal Year (Oct 1 – Sept 30) MO – Months WK – Week (Mon-Sun) DY - Day(s) PERM – Permanent (Life of State) LOA – Life of Agency NOTE: Please put an asterisk (*) in the Remarks section for any record series that contains born-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).		Security Status Codes P – Public Record M – May Contain Confidential Information C – Confidential Information			State Records Center Use Y – Yes N - No		Agency Abbreviations		
		Archival Processing Codes A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			Vital Record Identification Code V= Vital I = Important U= Useful				

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Amy Herrera
 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

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- ORIGINAL SUBMISSION
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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks			
Item Number	Records Series Title						Retention Period		
							In Office	In Storage	Total Retention
066.000	University of Louisiana Monroe / Office of the President / Athletic Director & Athletic Compliance								
1	Athletic Grant-in-Aid Award Letters	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of FY in which grant is closed.
2	NCAA Squad Lists & Eligibility Declarations	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
3	NCAA Initial Eligibility Student – Athlete Reports	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
4	NCAA Sports & Demographic Reports	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
5	NCAA Certification of Compliance Forms	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
6	Sport Participation Reports	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
7	NCAA Declaration of Outside Income	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
8	Declaration of Sport Playing Season	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
9	Student – Athlete Transfer Information Forms	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
10	Waivers for NCAA Legislation	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
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		Archival Processing Codes A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			Vital Record Identification Code V= Vital I = Important U= Useful				

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Amy Moran
 Secretary of State, State Archives & Records Services

JAN 22 2024
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Agency No	Agency / Division / Section	Retention Period			Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Office of the President / Athletic Director & Athletic Compliance								
11	NCAA Student – Athlete Statement	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which student no longer enrolled.
12	NCAA Drug Testing Statement	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
13	Student – Athlete Compliance Paperwork	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which student no longer enrolled.
14	NCAA Secondary Infraction Reports	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which matter is resolved.
15	NCAA Student-Athlete Opportunity Fund Request	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
16	NCAA Academic Performance Program Report	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
17	Prospective Student-Athlete Official Visit Records	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
18	Coaching Staff Recruiting Logs	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
19	NCAA Rules Education Documents	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Office of the President / Internal Audit								
1	Internal Audit Working Papers	ACT + 3 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
2	Legislative Auditor/Internal Audit	ACT + 10 FY	PERM	PERM	M	R	N	V	ACT = Until end of FY in which matter is closed.
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Agency No	Agency / Division / Section	In Office	In Storage	Total Retention	Security	Archival	State Records Center	Vital	Remarks
066.000	University of Louisiana Monroe / Office of the President / Office of Institutional Legal, Equity & Title IX Compliance								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Case Files	PERM	0	PERM	M	R	N	V	
2	University Policies	PERM	0	PERM	M	R	N	V	
3	University Training Records	PERM	0	PERM	M	R	N	V	
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Agency No	Agency / Division / Section	Retention Period			Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research								
1	Inventory	ACT + 2 AY	0	ACT + 2 AY	P	S	N	I	ACT = until end of AY in which created or received.
2	Policies and Procedures	PERM	0	PERM	P	R	N	V	
3	Annual Reports	PERM	0	PERM	M	R	N	V	
4	Unit Budget	PERM	0	PERM	P	R	N	V	
5	Supervisor Files	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end CY in which employee separates from agency.
6	Purchase Orders	ACT + 3 FY	0	ACT + 3 FY	P	S	N	V	ACT = until end FY in which audited.
7	Requisitions	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end FY in which created or received.
8	Proposal Checklists	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
9	Cost Share Documents	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
10	Consortium Agreements	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
Permitted Retention Period Abbreviations		Security Status Codes			State Records Center Use			Agency Abbreviations	
ACT – Active Period (when used define term in remarks column) FY- Fiscal Year (July 1- June 30) CY – Calendar Year (Jan 1 – Dec 31) AY – Academic Year (Aug 1 – July 31) FFY – Federal Fiscal Year (Oct 1 – Sept 30) MO – Months WK – Week (Mon-Sun) DY - Day(s) PERM – Permanent (Life of State) LOA – Life of Agency NOTE: Please put an asterisk (*) in the Remarks section for any record series that contains born-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).		P – Public Record M – May Contain Confidential Information C – Confidential Information			Y – Yes N - No				
		Archival Processing Codes			Vital Record Identification Code				
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Agency No	Agency / Division / Section	Retention Period			Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research								
11	Unfunded Grants	ACT + 1 FY	0	ACT + 1 FY	M	S	N	U	ACT = until end FY in which grant closes.
12	Funded Grants	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
13	Conflict of Interest Forms	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
14	CITI Ethics Training	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end FY in which created or received.
15	Compensation Forms	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
16	Research Personnel Forms (Departmental Copy)	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
17	Computing Center Forms	ACT + 7 FY	0	ACT + 7 FY	P	S	N	U	ACT = until end FY in which grant closes.
18	Deadline Variance Forms	ACT + 7 FY	0	ACT + 7 FY	M	S	N	I	ACT = until end FY in which grant closes.
19	Course Reduction Forms	ACT + 1 FY	0	ACT + 1 FY	M	S	N	I	ACT = until end FY in which grant closes.
20	Contract Master Budget Documents	ACT + 7 FY	0	ACT + 7 FY	M	S	N	I	ACT = until end FY in which grant closes.
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Agency No	Agency / Division / Section	Retention Period			Security	Archival	State Records Center	Vital	Remarks
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research	In Office	In Storage	Total Retention					
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
21	Cost Share Transfer Forms	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
22	Grant Closeout Forms	ACT + 3 FY	0	ACT + 3 FY	P	S	N	V	ACT = until end FY in which grant closes.
23	No Cost Extension Forms	ACT + 1 FY	0	ACT + 1 FY	P	S	N	U	ACT = until end FY in which grant closes.
24	Human Subject Request to Review Forms	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end FY in which created or received.
25	IACUC Forms	PERM	0	PERM	C	R	N	V	
26	Human Subject Approval Forms	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end FY in which created or received.
27	IBC Forms	PERM	0	PERM	P	R	N	V	
28	Invention Disclosure Forms	PERM	0	PERM	C	R	N	V	
29	UBMT Agreement Forms	PERM	0	PERM	M	R	N	V	Made public after student notified.
30	Reviewed Purchase Orders	ACT + 1 FY	0	ACT + 1 FY	P	S	N	U	ACT = until end of FY in which record created or received.
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Secretary of State, State Archives & Records Services

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066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research								
31	Communications with Grants Agency	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which grant closes.
32	Research Council Minutes	PERM	PERM	PERM	C	R	N	V	
33	Preliminary Misconduct Inquiry Notes	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
34	Misconduct Inquiry Data and Notes	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
35	Misconduct Investigation Notes and Data	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
36	Correspondence to Office of Treatment Integrity	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
37	Submitted Research Data	PERM	PERM	PERM	C	R	N	V	
38	Record of Staff Training	ACT + 1 FY	0	ACT + 1 FY	P	S	N	I	ACT = until end of FY in which created or received.
39	Staff Confidentiality Agreement	ACT + 1 FY	0	ACT + 1 FY	P	S	N	U	ACT = until end of FY in which employee separates from program.
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Cathy Mora
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / TRIO Program								
1	Student Records – ETS + UB	ACT + 14 FY	0	ACT + 14 FY	C	S	N	I	ACT = until end of FY in which created or received.
2	Procedural and Policy Manual	PERM	0	PERM	P	R	N	V	
3	Grant Award Letter(s)	PERM	0	PERM	P	R	N	V	U.S. Department of Education
4	ETS Supervisor Records	PERM	0	PERM	M	S	N	V	
5	UB Supervisor Records	PERM	0	PERM	M	S	N	V	
6	Copies of ETS Grant	PERM	0	PERM	P	R	N	V	Grant funded under 84.044A
7	Copies of UB Grant	PERM	0	PERM	P	R	N	V	Grant funded under 84.044A
8	Compansol (BLUMEN) Data System	PERM	0	PERM	C	R	N	V	
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