Louisiana State Archives—Records Management

Page 20 of 97 Louisiana Secretary of State Post Office Box 94125, Baton Rouge, LA 70804 recmqt@sos.la.gov Indicate Use of Form Agency / Division / Section Agency No ORIGINAL SUBMISSION 066.000 University of Louisiana Monroe / Provost & Vice President for Academic Affairs / College X RENEWAL of Health Sciences / Kitty Degree School of Nursing State Records Center __REPLACEMENT PAGE ltem **Retention Period** ADDENDUM PAGE Security Archival **Records Series Title** Number Total Remarks In Vital In Office **Storage** Retention 1 Graduate Files - Student Academic Folders С **PERM** PERM s V Ν 2 **Prospective Students** ACT + 3 FY 0 ACT + 3 FY С S Ν ACT = until end of FY in which created or received. 3 Pre-nursing and Nursing Academic Folders **PERM** 0 PERM С S N V 4 ACT = until end of FY in which student no longer Student Files ACT + 3 FY 0 С V ACT + 3 FY s Ν enrolled. 5 Student Clinical Folders С ACT + 1 CY ACT + 1 CY O S Ν V ACT = until end of CY in which program is complete. 6 Assessment/ Evaluation Diagnostic Reports ACT+1CY 0 С s ACT + 1 CY N ŧ ACT = until end of CY in which created or received. 7 ACT = until end of AY in which created or received. **Test Scantrons** ACT + 1 AY 0 ACT + 1 AY С s Ν U Scantrons = machine readable answer sheets. 8 Keved Test Booklets & Test Analysis С ACT + 5 AY 0 ACT + 5 AY S Ν V ACT = until end of AY in which created or received. 9 Grade Book or Grade Sheet for Each Course ACT + 3 FY 0 ACT + 3 FY С S Ν ٧ ACT = until end of FY in which created or received. 10 **Clinical Contracts** ACT + 5 CY С s V ACT + 5 CY Ν ACT = until end of CY in which contract lapses. Permitted Retention Period Abbreviations **Security Status Codes** State Records Center **Agency Abbreviations** Use ACT – Active Period (when used define term in remarks column) P - Public Record Y - Yes FY- Fiscal Year (July 1- June 30) M - May Contain Confidential Information N - No C - Confidential Information CY - Calendar Year (Jan 1 - Dec 31) AY - Academic Year (Aug 1 - July 31) **Archival Processing Codes** Vital Record **Identification Code** FFY - Federal Fiscal Year (Oct 1 - Sept 30) A - Transfer to State Archives V= Vital MO - Months WK - Week (Mon-Sun) DY - Day(s) R - Retain in Agency Archives I = Important PERM - Permanent (Life of State) LOA - Life of Agency S - Review by State Archives U= Useful NOTE: Please put an asterisk (*) in the Remarks section for any record O - Other (Specify in Remarks) series that contains born-digital or imaged records. Include brief

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description of the technology. (Ex. Scanned to OnBase).

1/10/2024

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Secretary of State, State Archives & Records Services

JAN 2 2 2024

Date Approved

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Page 21 of 97 Indicate Use of Form Agency No Agency / Division / Section ORIGINAL SUBMISSION 066,000 University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health X RENEWAL Sciences / Kitty Degree School of Nursing Records REPLACEMENT PAGE ltem **Retention Period** ADDENDUM PAGE Archival Security **Records Series Title** Number State R Total Remarks In Vital In Office Storage Retention 11 Louisiana State Board of Nursing Clinical Faculty ACT + 1 CY 0 ACT + 1 CY С S ٧ Ν ACT = until end of CY in which created or received. Survey Forms 12 Current Louisiana State Board of Nursing ACT +3 FY 0 ACT +3 FY С S Ν ٧ ACT = until end of FY in which created or received. **Preceptor Qualification Forms** 13 С Clinical Agency Letter of Agreement ACT +3 FY S ٧ 0 ACT +3 FY Ν ACT = until end of FY in which agreement ends. 14 ACT = until end of FY in which patient reaches age of Infant Assessment Permission Forms ACT +5 FY 0 ACT +5 FY С s V Ν majority. 15 Clinical Site Request Approval Forms ACT +3 FY 0 ACT +3 FY С S Ν V ACT = until end of FY in which created or received. 16 Department Heads Annual Report for С S ACT +10 FY 0 ACT +10 FY Ν ACT = until end of FY in which created or received. **Evaluation Committee** 17 Course Syllabi ACT +10 FY 0 ACT +10 FY С s ٧ Ν ACT = until end of FY in which created or received. 18 School of Nursing Self-Study Report ACT +10 FY 0 ACT +10 FY С S ٧ Ν ACT = until end of FY in which created or received. 19 School of Nursing Annual Report to the University **PERM PERM** С 0 R Ν ٧ 20 Louisiana State Board of Nursing Annual Report ACT +10 FY ACT +10 FY С S V ACT = until end of FY in which created or received. **Permitted Retention Period Abbreviations Security Status Codes State Records Center Agency Abbreviations** Use ACT - Active Period (when used define term in remarks column) P - Public Record Y - Yes FY- Fiscal Year (July 1- June 30) M - May Contain Confidential Information N - No CY - Calendar Year (Jan 1 - Dec 31) C - Confidential Information AY - Academic Year (Aug 1 - July 31) **Archival Processing Codes** Vital Record **Identification Code** FFY - Federal Fiscal Year (Oct 1 - Sept 30) A - Transfer to State Archives V= Vital MO - Months WK - Week (Mon-Sun) DY - Day(s) R - Retain in Agency Archives I = Important PERM – Permanent (Life of State) LOA-Life of Agency S - Review by State Archives U= Useful NOTE: Please put an asterisk (*) in the Remarks section for any record O - Other (Specify in Remarks) series that contains born-digital or imaged records. Include brief

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Louisiana State Archives—Records Management Page 22 of 97 Louisiana Secretary of State Post Office Box 94125, Baton Rouge, LA 70804 Indicate Use of Form recmat@sos.la.gov Agency / Division / Section Agency No _ORIGINAL SUBMISSION 066.000 University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health X RENEWAL Sciences / Kitty Degree School of Nursing State Records Center REPLACEMENT PAGE Item ADDENDUM PAGE **Retention Period** Security Archival **Records Series Title** Number Total Remarks Vital ln In Office Storage Retention 21 S **Faculty Folders** ACT + 30 FY 0 ACT + 30 FY М Ν ٧ ACT = until end of FY in which no longer employed. 22 Louisiana State Board of Nursing Letters on ACT + 5 FY O ACT + 5 FY С S ٧ ACT = until end of FY in which created or received. Ν Students in Clinical 23 ACT + 10 FY S Prospective Faculty Folders ACT + 10 FY 0 С Ν ACT = until end of FY in which created or received. 24 Minutes for School of Nursing ACT + 10 FY 0 ACT + 10 FY С S Ν ٧ ACT = until end of FY in which created or received. 25 **PERM** R ٧ **Budget Information** PERM 0 М Ν 26 Purchase Orders/ Invoices ACT + 3 FY O ACT + 3 FY M S Ν ٧ ACT = until end of FY in which audited. 27 R v **Continuing Education Files PERM** 0 PERM С Ν 28 С V Personal School of Nursing Files 0 **PERM** R Ν PERM 29 С R Certified Nurses Aid Files PERM 0 **PERM** N V **Permitted Retention Period Abbreviations Security Status Codes State Records Center Agency Abbreviations** Use ACT - Active Period (when used define term in remarks column) P - Public Record Y - Yes M - May Contain Confidential Information FY- Fiscal Year (July 1- June 30) N - No C - Confidential Information CY - Calendar Year (Jan 1 - Dec 31) AY - Academic Year (Aug 1 - July 31) Vital Record **Archival Processing Codes Identification Code** FFY - Federal Fiscal Year (Oct 1 - Sept 30) A - Transfer to State Archives V= Vital MO - Months WK - Week (Mon-Sun) DY - Day(s) R - Retain in Agency Archives I = Important PERM - Permanent (Life of State) S - Review by State Archives LOA - Life of Agency U= Useful NOTE: Please put an asterisk (*) in the Remarks section for any record O - Other (Specify in Remarks)

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Agency No	Agency / Division / Section						10.		_ORIGINAL SUBMISSION
066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health Sciences / School of Allied Health / Kinesiology								X_RENEWAL REPLACEMENT PAGE
Item Number	Records Series Title	Records Series Title Retention Period	<u>\$</u>	<u></u>	Records		_ADDENDUM PAGE		
, rumber		In Office	In Storage	Tota! Retentio	u Security	Security	State F	Vital	Remarks
1	Course Syllabi	ACT + 6 FY	0	ACT + 6 F	Y P	s	N	t	ACT = until end of FY in which created or received.
2	Course Grades	ACT + 6 FY	0	ACT + 6 F	Y C	s	N	ı	ACT = until end of FY in which created or received.
3	Human Performance Lab Requisitions	ACT + 6 FY	0	ACT + 6 F	Y P	s	N	ı	ACT = until end of FY in which created or received.
4	Printing Requisitions	ACT + 6 FY	0	ACT + 6 F	Y P	s	N	ı	ACT = until end of FY in which created or received.
5	Faculty Folders	ACT + 6 FY	0	ACT + 6 F	Y C	s	N	ı	ACT = until end of FY in which no longer employed.
6	Faculty Timesheets	ACT + 6 FY	0	ACT + 6 F	Y M	s	N	ı	ACT = until end of FY in which created or received.
7	Student Worker Folders	ACT + 6 CY	0	ACT + 6 C	Y M	s	N	L	ACT = until end of CY in which student is no longer enrolled.
8	Graduate Assistantship Folders	ACT + 3 FY	0	ACT + 3 F	Y M	s	N	1	ACT = until end of FY in which student is no longer enrolled.
9	Civil Service Folder	ACT + 6 FY	0	ACT + 6 FY		s	N	ı	ACT = until end of FY in which no longer employed.
10	Budget Transfer	ACT + 6 FY	0	ACT + 6 F	Y P	s	N	ı	ACT = until end of FY in which created or received.
Permitted Ref	tention Period Abbreviations	,				cords	Center		Agency Abbreviations
	Period (when used define term in remarks column)	P - Public Record			Use				
	ar (July 1- June 30)	M – May Contai		Information	N - No	Y – Yes			
	CY - Calendar Year (Jan 1 - Dec 31)		Information						
AY – Academic Year (Aug 1 – July 31)		ا ا			Vital Re-		Code		
FFY – Federal Fiscal Year (Oct 1 – Sept 30)		A - Transfer to State Archives			V= Vital	lentification Code = Vital			
MO - Months WK - Week (Mon-Sun) DY - Day(s)		R – Retain in Agency Archives				I = Important			
PERM – Permanent (Life of State) LOA – Life of Agency NOTE: Please put an asterisk (*) in the Remarks section for any record		5 - Neview by State Archives				U= Useful			
series that contains born-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).		O - Other (Spec	uny in Remarks	•)					

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Louisiana State Archives—Records Management Page 24 of 97 Louisiana Secretary of State Post Office Box 94125, Baton Rouge, LA 70804 recmgt@sos.la.gov Indicate Use of Form Agency / Division / Section Agency No _ORIGINAL SUBMISSION 066.000 University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health X RENEWAL Sciences / School of Allied Health / Kinesiology Records __REPLACEMENT PAGE Item ADDENDUM PAGE **Retention Period** Archival Security **Records Series Title** Number State Ro Center **Total** Remarks ln Vital In Office Storage Retention 11 Copy Machine ACT + 6 FY ACT + 6 FY Р 0 S Ν ACT = until end of FY in which created or received. 12 Travel Reports ACT + 6 FY 0 ACT + 6 FY Р s Ν ACT = until end of FY in which created or received. 13 Interdepartmental ACT + 6 FY 0 ACT + 6 FY P S Ν ACT = until end of FY in which created or received. 14 Purchase Orders ACT + 6 FY 0 ACT + 6 FY Р S Ν 1 ACT = until end of FY in which created or received. 15 **Graduate Files** ACT + 10 FY 0 ACT + 10 FY С S V Ν ACT = until end of FY in which no longer enrolled. 16 С **Undergraduate Files** ACT + 10 FY 0 ACT + 10 FY S Ν ACT = until end of FY in which no longer enrolled. Permitted Retention Period Abbreviations **Security Status Codes** State Records Center **Agency Abbreviations** Use ACT - Active Period (when used define term in remarks column) P - Public Record Y - Yes M - May Contain Confidential Information FY- Fiscal Year (July 1- June 30) N - No CY - Calendar Year (Jan 1 - Dec 31) C - Confidential Information AY - Academic Year (Aug 1 - July 31) **Archival Processing Codes** Vital Record **Identification Code** FFY - Federal Fiscal Year (Oct 1 - Sept 30) A - Transfer to State Archives V= Vital MO - Months WK - Week (Mon-Sun) DY - Day(s) R - Retain in Agency Archives I = Important PERM - Permanent (Life of State) LOA - Life of Agency S - Review by State Archives U= Useful NOTE: Please put an asterisk (*) in the Remarks section for any record O - Other (Specify in Remarks)

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Page 25 of 97 Post Office Box 94125, Baton Rouge, LA 70804 recmgt@sos.la.gov Indicate Use of Form Agency No Agency / Division / Section __ORIGINAL SUBMISSION University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health 066.000 X RENEWAL Sciences/ School of Allied Health / Health Studies State Records Center __REPLACEMENT PAGE ltem ADDENDUM PAGE **Retention Period** Archival Security Number **Records Series Title** Total Remarks In Vital In Office Storage Retention 1 Student Academic Folders **PERM** 0 **PERM** С S V Ν 2 Tests/ Test Analyses ACT + 2 AY ACT + 2 AY S 0 M U Ν ACT = until end of AY in which created or received. 3 Grade Book ACT + 5 AY 0 ACT + 5 AY С S Ν U ACT = until end of AY in which created or received. 4 **Practicum Contracts** 0 С S ACT + 10 AY ACT + 10 AY U Ν ACT = until end of AY in which contract lapses. 5 **Faculty Files** ACT PERM **PERM** С R Ν ٧ ACT = until end of AY in which created or received. 6 Annual Report ACT + 1 FY Р R PERM PERM Ν ACT = until end of FY in which created or received. **Permitted Retention Period Abbreviations Security Status Codes** State Records Center **Agency Abbreviations** Use ACT - Active Period (when used define term in remarks column) P - Public Record Y - Yes FY- Fiscal Year (July 1- June 30) M - May Contain Confidential Information N - No CY - Calendar Year (Jan 1 - Dec 31) C - Confidential Information AY - Academic Year (Aug 1 - July 31) **Archival Processing Codes** Vital Record **Identification Code** FFY - Federal Fiscal Year (Oct 1 - Sept 30) A - Transfer to State Archives V= Vital MO - Months WK - Week (Mon-Sun) DY - Day(s) R - Retain in Agency Archives I = Important PERM - Permanent (Life of State) LOA - Life of Agency S - Review by State Archives U= Useful NOTE: Please put an asterisk (*) in the Remarks section for any record O - Other (Specify in Remarks) series that contains born-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).

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066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs/ College of Health Sciences / School of Allied Health / Dental Hygiene						%		X_RENEWALREPLACEMENT PAGE
Item Number	Records Series Title	Retention Period			≥	<u>a</u>	Records		ADDENDUM PAGE
- Number	NOOVIGO GONES TIME	Records Series Title In Office In Office Retention Period In Total Storage Retention	Archiva State R Center	Vital	Remarks				
1	Student Academic Files	PERM	0	PERM	С	s	N	٧	
2	Graduate Academic Files	PERM	0	PERM	С	R	N	V	
3	Student Files	ACT + 3 AY	0	ACT + 3 A	Y C	s	N	U	ACT = until end of AY in which student no longer enrolled.
4	Patient Clinical Files (Adults)	ACT + 5 AY	5 AY	ACT + 10 A	Y C	s	N	٧	ACT = until end of AY in which created or received.
5	Patient Clinical Files (Children)	ACT + 5 AY	5 AY	ACT + 10 A	AY C	s	N	1	ACT = until end of AY in which patient reaches age of majority.
6	Student Clinical Files	ACT + 3 AY	0	ACT + 3 A	Y C	s	N	U	ACT = until end of AY in which student no longer enrolled.
7	Exams/ Scantrons/ Analyses	ACT + 1 AY	0	ACT + 1 A	Y C	s	N	U	ACT = until end of AY in which created or received. Scantrons = machine readable answer sheets.
8	Course Grade Books/ Electronic Grades	ACT + 5 AY	0	ACT + 5 A	Y C	s	N	1	ACT = until end of AY in which created or received.
9	Correspondence	ACT + 3 AY	0	ACT + 3 A	Y C	s	N	1	ACT = until end of AY in which created or received.
Permitted Ret	ention Period Abbreviations				State Re	cords	Center		Agency Abbreviations
ACT - Active F	Period (when used define term in remarks column)	P – Public Reco	ord		*	Use			
	r (July 1- June 30)	M – May Contai		Information	Y – Yes				
	CY – Calendar Year (Jan 1 – Dec 31)		C - Confidential Information			N - No			
1	AY – Academic Year (Aug 1 – July 31)		ssing Codes		Vital Re		Code		
1	FFY – Federal Fiscal Year (Oct 1 – Sept 30)		A - Fransier to State Archives			Identification Code V= Vital			
MO – Months WK – Week (Mon-Sun) DY - Day(s)		R - Retain in Agency Archives				I = Important			
PERM – Permanent (Life of State) LOA – Life of Agency		5 - Review by State Archives				U= Useful			
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Agency No	Agency / Division / Section	1	1	5.ia.go		ORIGINAL SUBMISSION				
66	University of Louisiana Monroe/ Provost & VP fo Sciences/ School of Allied Health/ Medical Labor		fairs/ Colleg	e of Health			क्ष		RENEWAL REPLACEMENT PAGE	
Item	Records Series Title	Retention Period				<u></u>	Records		XADDENDUM PAGE	
Number	Records Series Title	In Office	In Storage	Total Retentio	Security	Archival	State F Center	Vital	Remarks	
1	Graduate Files - Student Academic/Clinical Folders	PERM	0	PERM	С	R	N	V	ACT = until end of AY in which created or received.	
2	Exam/ Scantrons/ Analyses	ACT + 1AY	0	ACT + 1A	Y C	s	N	υ	ACT = until end of AY in which created or received. Scantrons = machine readable answer sheets.	
3	Course Grade Book/ Grade Sheets	ACT + 5AY	0	ACT + 5A	Y C	s	N	υ	ACT = until end of AY in which created or received.	
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Permitted Ret	ention Period Abbrevlations					cords	Center		Agency Abbreviations	
	Period (when used define term in remarks column)	P – Public Record								
FY- Fiscal Year (July 1- June 30) CY – Calendar Year (Jan 1 – Dec 31)		M - May Contain Confidential Information			Y – Yes N - No					
AY - Academic	c Year (Aug 1 – July 31)	Archival Processing Codes Vi			Vital Rec					
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066.000	University of Louisiana Monroe / Provost & VP	rsity of Louisiana Monroe / Provost & VP for Academic Affairs/ College of Health ces / School of Allied Health / Occupational Therapy						sp		ORIGINAL SUBMISSIONRENEWAL REPLACEMENT PAGE	
Item Number	Records Series Title	Retention Period				ځ	<u> </u>	Records		X_ADDENDUM PAGE	
	TROOFIES THE	In Office	In Storage	Total Retentio	n	Security	Archival	State Re Center	Vital	Remarks	
1	Graduate Files – Student Academic Folders	PERM	0	PERM		С	s	N	٧		
2	Tests/ Scantrons/ Test Analyses	ACT + 1 AY	0	ACT + 1 A	AY	С	s	N	U	ACT = until end of FY in which created or received. Scantrons = machine readable answer sheets.	
3	Grade Book or Grade Sheets for Each Course	ACT + 5 AY	0	ACT + 5 A	ΑY	С	s	N	U	ACT = until end of FY in which created or received.	
4	Clinical Education Contracts	ACT + 10 CY	0	ACT + 10 (CY	М	s	N	1	ACT = until end of CY in which contract lapses.	
5	Budget Information	PERM	PERM	PERM		Р	R	N	ν		
6	Annual Report to the University	PERM	PERM	PERM		Р	R	N	٧		
7	ACOTE Accreditation Manual/ Report Document	PERM	0	PERM		Р	R	N	٧		
8	Supervisor Files	ACT + 5 CY	0	ACT + 5 C	CY	М	s	N	V		
9	Pediatric Clinic Files	ACT + 26 CY	0	ACT + 26 CY		С	s	N	1	ACT = until end of CY in which created or received.	
10	Adult Clinic Files	ACT + 10 CY	0	ACT + 10 (CY	С	s	N	1	ACT = until end of CY in which created or received.	
	tention Period Abbreviations	Security Status			State	State Records Center				Agency Abbreviations	
	Period (when used define term in remarks column)	P – Public Reco			I .	Y – Yes				ACOTE – The Accreditation Council of Occupation	
	ar (July 1- June 30)	M - May Contain Confidential Information			N - No					Therapy Education	
	r Year (Jan 1 – Dec 31)	C – Confidentia				Vital Record					
AY – Academic Year (Aug 1 – July 31)		J					ora tion C	ode			
FFY – Federal Fiscal Year (Oct 1 – Sept 30)		A – Franster to State Archives			V= Vital						
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Agency No	Agency / Division / Section					X_ORIGINAL SUBMISSION			
066.000	niversity of Louisiana Monroe / Provost & VP for Academic Affairs/ College of Health ciences / School of Allied Health / Physical Therapy						န္		RENEWALREPLACEMENT PAGE
Item Number	Records Series Title	Retention Period				<u> =</u>	Records		ADDENDUM PAGE
		In Office	In Storage	Total Retentio	Security	Archival	State R Center	Vital	Remarks
1	Graduate Files – Student Academic Folders	PERM	0	PERM	С	s	N	V	
2	Grade Book or Grade Sheets for Each Course	ACT + 5 AY	0	ACT + 5 A	Y C	s	N	υ	ACT = until end of FY in which created or received.
3	Clinical Education Contracts	ACT + 10 CY	0	ACT + 10	CY M	s	N	ı	ACT = until end of CY in which contract lapses.
4	Annual Report to the University	PERM	PERM	PERM	Р	R	N	V	
5	CAPTE Accreditation Manual/ Report Document	PERM	0	PERM	Р	R	N	V	ACOTE Accreditation Manual/ Report Document
6	Tests / Test Analyses	ACT + 1 AY	0	ACT + 1 A	Y C	s	N	U	ACT = until end of FY in which created or received. Scantrons = machine readable answer sheets.
7	Pediatric Clinic Files	ACT + 26 CY	0	ACT + 26 (CY C	s	N	I	ACT = until end of CY in which created or received.
8	Adult Clinic Files	ACT + 10 CY	0	ACT + 10 (CY C	s	N	1	ACT = until end of CY in which created or received.
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		Security Status			State Ro	ecoras	Center		Agency Abbreviations
	Period (when used define term in remarks column) ar (July 1- June 30)	P - Public Reco		Information	Y – Yes				ACOTE – The Accreditation Council of Occupation
	r Year (Jan 1 – Dec 31)	M - May Contain Confidential Information			N - No	N - No			Therapy Education
	c Year (Aug 1 – July 31)				Vital Pa	Vital Record			CAPTE – The Commission on Accreditation in Physical Therapy Education
FFY – Federal Fiscal Year (Oct 1 – Sept 30)					Identific		Code		
MO – Months WK – Week (Mon-Sun) DY - Day(s)					V= Vital				
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