

## Records Retention Schedule

SSARC-932 (09/20)

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

recmgt@sos.la.gov

Page 60 of 97

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					
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Student Accounts</b>								
<b>11</b>	Manual Adjustment	ACT + 2 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
<b>12</b>	Third Party Billing Reconciliations	ACT + 1 FY	2 FY	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
<b>13</b>	Banner Rate Tables	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
<b>14</b>	Refund Check Registers	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
<b>15</b>	SIS Balance	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
<b>16</b>	1098T – Tax	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
<b>17</b>	Outstanding Debt	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
<b>18</b>	Check Register	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
<b>19</b>	Check Register Outstanding Debt	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
<b>20</b>	Hurricane Katrina – Special Circumstances	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information			<b>State Records Center Use</b> Y – Yes N - No		<b>Agency Abbreviations</b> SIS – Student Information System		
		<b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			<b>Vital Record Identification Code</b> V= Vital I = Important U= Useful				

Indicate Use of Form  
 ORIGINAL SUBMISSION  
 RENEWAL  
 REPLACEMENT PAGE  
 ADDENDUM PAGE

Heather R. Pilcher

Agency Approval

1/10/2024

Date Signed

Amy Mora

Secretary of State, State Archives & Records Services

JAN 22 2024

Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 61 of 97

recmgt@sos.la.gov

Indicate Use of Form

- ORIGINAL SUBMISSION
- RENEWAL
- REPLACEMENT PAGE
- ADDENDUM PAGE

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					
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Student Accounts</b>								
21	Quarterly Debt (AR) Reports	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
22	Appeals Payment Information Files	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
23	Third Party Invoices and Waivers Files	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
24	Third Party Billing Files	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information			<b>State Records Center Use</b> Y – Yes N - No		<b>Agency Abbreviations</b> AR – Accounts Receivable		
		<b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			<b>Vital Record Identification Code</b> 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  
 Date Approved

## Records Retention Schedule

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

SSARC-932 (09/20)

Page 62 of 97

recmgt@sos.la.gov

Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title					
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Financial Reporting</b>					
1	Financial Statements	ACT + 10 FY	PERM	PERM	P R N V	ACT = until end of FY in which created or received.
2	Work Papers for Financial Statements	ACT + 10 FY	PERM	PERM	M R N V	ACT = until end of FY in which created or received.
3	Miscellaneous Scholarship Receivables Reconciliation Reports	ACT + 2 FY	3 FY	ACT + 5 FY	M S N U	ACT = until end of FY in which created or received.
4	Scholarship Receivables Reconciliation Reports	ACT + 2 FY	3 FY	ACT + 5 FY	M S N U	ACT = until end of FY in which created or received.
5	All Scholarship Reconciliation Reports	ACT + 2 FY	3 FY	ACT + 5 FY	M S N U	ACT = until end of FY in which created or received.
6	Bank Reconciliation Reports	ACT + 2 FY	3 FY	ACT + 5 FY	M S N V	ACT = until end of FY in which audited.
7	Unclaimed Property Reports	ACT + 2 FY	3 FY	ACT + 5 FY	M S N I	ACT = until end of FY in which created or received.
8	Accounts Receivable Sub-Ledgers Reports	ACT + 2 FY	3 FY	ACT + 5 FY	M S N I	ACT = until end of FY in which created or received.
9	Banner A/R Reconciliation Reports	ACT + 5 FY	0	ACT + 5 FY	M S N V	ACT = until end of FY in which audited.
10	Banner Student Payable Reconciliation Reports	ACT + 5 FY	0	ACT + 5 FY	M S N V	ACT = until end of FY in which audited.
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information  <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)		<b>State Records Center Use</b> Y – Yes N - No  <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b>  A/R – Accounts Receivable

Indicate Use of Form

ORIGINAL SUBMISSION  
 RENEWAL  
 REPLACEMENT PAGE  
 ADDENDUM PAGE

Hesther R. Pilcher  
 Agency Approval

1/10/2024  
 Date Signed

*Amey...*  
 Secretary of State, State Archives & Records Services

JAN 22 2024  
 Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 63 of 97

recmgmt@sos.la.gov

<b>Agency No</b>	<b>Agency / Division / Section</b>				<b>Security</b>	<b>Archival</b>	<b>State Records Center</b>	<b>Vital</b>	Indicate Use of Form	
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Financial Reporting</b>								__ ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL __ REPLACEMENT PAGE __ ADDENDUM PAGE	
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks	
		In Office	In Storage	Total Retention						
11	Banner Unapplied Cash and Financial Aid Files	ACT + 2 FY	3 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
12	Return Checking Working Files	ACT + 2 FY	3 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
13	Graduate Assistant Waivers Receivable Reconciliation Reports	ACT + 2 FY	3 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
<b>Permitted Retention Period Abbreviations</b>		<b>Security Status Codes</b>			<b>State Records Center Use</b>		<b>Agency Abbreviations</b>			
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 <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			Y – Yes N - No <b>Vital Record Identification Code</b> 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  
 Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 64 of 97

recmqmt@sos.la.gov

Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title					
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Student Loans</b>					
<b>1</b>	NBD 060 Report	ACT + 1 FY	4 FY	ACT + 5 FY	C S N U	ACT = until end of FY in which created or received.
<b>2</b>	EOM (End of the Month) Report	ACT + 1 FY	4 FY	ACT + 5 FY	M S N U	ACT = until end of FY in which created or received.
<b>3</b>	LMS Mid-Month & End of Month Report	ACT + 1 FY	4 FY	ACT + 5 FY	C S N U	ACT = until end of FY in which created or received.
<b>4</b>	HPSL – Total Cancellations Report	ACT + 1 FY	4 FY	ACT + 5 FY	C S N U	ACT = until end of FY in which created or received.
<b>5</b>	NDSL – Total Cancellations Report	ACT + 1 FY	4 FY	ACT + 5 FY	C S N U	ACT = until end of FY in which created or received.
<b>6</b>	EOF (End of Year) Report	PERM	0	PERM	M R N V	
<b>7</b>	Discrepancy List Report	ACT + 5 FY	0	ACT + 5 FY	M S N V	ACT = until end of FY in which created or received.
<b>8</b>	LMS Paid in Full Files	ACT + 1 FY	4 FY	ACT + 5 FY	C S N U	ACT = until end of FY in which created or received.
<b>9</b>	Federal Loans Outstanding	ACT + 1 FY	4 FY	ACT + 5 FY	M S N U	PERM until paid in full or transferred.
<b>10</b>	Federal Government NDSL Report	ACT + 2 FY	4 FY	ACT + 5 FY	C S N U	ACT = until end of FY in which created or received.
<b>Permitted Retention Period Abbreviations</b> 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 bom-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)		<b>State Records Center Use</b> Y – Yes N - No <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b> NBD 060 – Next Business Day – report that includes loan balances, activity, and cohort rates EOM – End of Month LMS – Loan Management System HPSL – Health Professional Student Loans NDSL – National Direct Student Loan EOF – End of Year

Indicate Use of Form

ORIGINAL SUBMISSION  
 RENEWAL  
 REPLACEMENT PAGE  
 ADDENDUM PAGE

Heather R. Pilcher  
 Agency Approval

1/10/2024  
 Date Signed

*Amy Moran*  
 Secretary of State, State Archives & Records Services

JAN 22 2024  
 Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 65 of 97

recmgmt@sos.la.gov

Indicate Use of Form

- ORIGINAL SUBMISSION
- RENEWAL
- REPLACEMENT PAGE
- ADDENDUM PAGE

Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks			
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Student Loans</b>								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
11	Health Professional Loans – Nursing Loans Purchased by ULM Report	ACT + 2 FY	3 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
12	Paid in Full Accounts (Folders) Files	ACT + 1 FY	4 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
13	Paid Out Files	ACT + 1 FY	4 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
14	NBD 060 Feed Journal Report	ACT + 1 FY	4 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
15	Learning Management System Daily Payments Report	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.
16	Tuition Payments Report	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
17	End of the Year Report	ACT + 5 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
18	End of the Year NJY 600/630 cohort (01-03) Report	ACT + 5 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)		<b>State Records Center Use</b> Y – Yes N - No <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b> NBD 060 – Next Business Day – Daily Transaction Journal Report NJY – Name given a reporting form by the agency			

Heather R. Pilcher  
 Agency Approval

1/10/2024  
 Date Signed

*Amber...*  
 Secretary of State, State Archives & Records Services

JAN 22 2024  
 Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 66 of 97

recmgt@sos.la.gov

Indicate Use of Form

- ORIGINAL SUBMISSION
- RENEWAL
- REPLACEMENT PAGE
- ADDENDUM PAGE

Agency No	Agency / Division / Section	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
Item Number	Records Series Title								
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / Grants &amp; Contracts</b>								
1	Grant Folders	ACT + 6 CY	0	ACT + 6 CY	M	S	N	I	ACT = until end of CY in which grant is closed out.

<p><b>Permitted Retention Period Abbreviations</b></p> <p>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</p> <p>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>	<p><b>Security Status Codes</b></p> <p>P – Public Record                  M – May Contain Confidential Information                  C – Confidential Information</p> <p><b>Archival Processing Codes</b></p> <p>A – Transfer to State Archives                  R – Retain in Agency Archives                  S – Review by State Archives                  O – Other (Specify in Remarks)</p>	<p><b>State Records Center Use</b></p> <p>Y – Yes                  N - No</p> <p><b>Vital Record Identification Code</b></p> <p>V= Vital                  I = Important                  U= Useful</p>	<p><b>Agency Abbreviations</b></p>
--	---	--	------------------------------------

*Heather R. Pilcher*

\_\_\_\_\_  
 Agency Approval

1/10/2024

Date Signed

*Amy Mora*

\_\_\_\_\_  
 Secretary of State, State Archives & Records Services

JAN 22 2024

Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 67 of 97

[recmgt@sos.la.gov](mailto:recmgt@sos.la.gov)

Indicate Use of Form

- ORIGINAL SUBMISSION  
 RENEWAL  
 REPLACEMENT PAGE  
 ADDENDUM PAGE

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	Security	Archival	State Records Center	Vital	Remarks	
066.000	University of Louisiana Monroe / VP for Business Affairs / Controller / Payroll														
1	Tax Returns (W-2s & 941s) and Worksheets			ACT + 2 FY	PERM	PERM	C	R	N	V			ACT = until end of FY in which created or received.		
<b>Permitted Retention Period Abbreviations</b>				<b>Security Status Codes</b>				<b>State Records Center Use</b>				<b>Agency Abbreviations</b>			
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				<b>Vital Record Identification Code</b>							
AY – Academic Year (Aug 1 – July 31)				<b>Archival Processing Codes</b>				V= Vital							
FFY – Federal Fiscal Year (Oct 1 – Sept 30)				A – Transfer to State Archives				I = Important							
MO – Months WK – Week (Mon-Sun) DY - Day(s)				R – Retain in Agency Archives				U= Useful							
PERM – Permanent (Life of State)      LOA – Life of Agency				S – Review by State Archives											
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). OnBase).				O – Other (Specify in Remarks)											

Heather R. Pilcher  
 Agency Approval

1/10/2024  
 Date Signed

Amy Mora  
 Secretary of State, State Archives & Records Services

JAN 22 2024  
 Date Approved



# Records Retention Schedule

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

SSARC-932 (09/20)

Page 68 of 97

recmgt@sos.la.gov

<b>Agency No</b>	<b>Agency / Division / Section</b>				<b>Security</b>	<b>Archival</b>	<b>State Records Center</b>	<b>Vital</b>	Indicate Use of Form	
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Controller / LaCap</b>								__ ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL __ REPLACEMENT PAGE __ ADDENDUM PAGE	
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks	
		In Office	In Storage	Total Retention						
1	ACH Refunds Reports	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
2	Student Direct Deposit Reports	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
3	Cashier's Reports	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
<b>Permitted Retention Period Abbreviations</b>		<b>Security Status Codes</b>			<b>State Records Center Use</b>			<b>Agency Abbreviations</b>		
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			LaCap – Louisiana Capitol Federal Credit Union ACH – Automated Clearing House		
		<b>Archival Processing Codes</b>			<b>Vital Record Identification Code</b>					
		A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			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  
 Date Approved

# Records Retention Schedule

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

SSARC-932 (09/20)

Page 69 of 97

recmgmt@sos.la.gov

Indicate Use of Form

- ORIGINAL SUBMISSION
- RENEWAL
- REPLACEMENT PAGE
- ADDENDUM PAGE

Agency No	Agency / Division / Section	In Office	In Storage	Total Retention	Security	Archival	State Records Center	Vital	Remarks
066.000	University of Louisiana Monroe / VP for Business Affairs / Facilities, Capital Projects, and Environmental Health & Safety								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Architectural Files	PERM	0	PERM	M	R	N	V	
2	Payroll Action Forms	ACT + 2 FY	3 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
3	Capital Outlay Requests Budgets	ACT + 5 FY	5 FY	ACT + 10 FY	P	S	N	U	ACT = until end of FY in which created or received.
4	Fire Marshall Inspections	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
5	Project Director General Files	ACT + 2 FY	2 FY	ACT + 4 FY	M	S	N	U	ACT = until end of FY in which created or received.
6	Risk Management Claims	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			<b>State Records Center Use</b> Y – Yes N - No <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b>		

Heather R. Pilcher  
 Agency Approval

1/10/2024  
 Date Signed

*Amy M...*  
 Secretary of State, State Archives & Records Services

JAN 22 2024  
 Date Approved