

# Records Retention Schedule

SS ARC 932 (11/17)

**Louisiana Secretary of State**  
 Division of Archives, Records Management and History  
 Post Office Box 94125, Baton Rouge, LA 70804

Http://www.sos.la.gov

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Indicate Use of Form <input type="checkbox"/> ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input type="checkbox"/> ADDENDUM PAGE
Remarks

Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Retention Period			Remarks
Item Number	Records Series Title					In Office	In Storage	Total Retention	
066.000	University of Louisiana Monroe/ VP of Academic Affairs/ Assessment & Evaluation								
1	Assessment Documentation	M	S	N	I	ACT + 3AY	0	ACT + 3AY	ACT = until end of AY in which created or received.
2	Inventory	P	S	N	I	ACT + 2FY	0	ACT + 2FY	ACT = until end of FY in which created or received.
3	Supervisor Files	M	S	N	I	ACT + 5CY	0	ACT + 5CY	ACT = until end of FY in which employee is no longer with agency
4	Purchase Order	P	S	N	I	ACT + 3FY	0	ACT + 3FY	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 DY - Day(s) PERM – Permanent		<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>			
		<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

9/12/19  
 Date Signed

*[Signature]*  
 Secretary of State, State Archives & Records Services

9/17/2019  
 Date Approved

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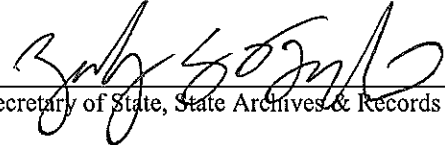
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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title					
<b>066.000</b>	<b>University of Louisiana Monroe/ VP of Academic Affairs/ Graduate School</b>					
<b>1</b>	Student Records	C	S	N	V	
<b>2</b>	Graduate Council Minutes	M	S	N	V	ACT = until end of AY year record created or received.
<b>3</b>	Graduate Catalog	P	R	N	V	
<b>4</b>	Application Materials for Incomplete Applicants	C	S	N	V	ACT = until end of AY year record created or received
<b>5</b>	Application Materials for Denied Applicants	C	S	N	V	ACT = until end of AY year record created or received
<b>6</b>	Application Materials for Admitted Applicants who do not enroll	C	S	N	V	ACT = until end of AY year record created or received
<b>7</b>	Education Graduates: Degree Plan and Grade Sheet	M	R	N	I	
<b>8</b>	Graduate Assistant Records	M	S	N	I	ACT = until end of AY in which employed
<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 DY - Day(s) PERM – Permanent		<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>
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Item Number	Records Series Title						Retention Period		
							In Office	In Storage	Total Retention
066.000	University of Louisiana Monroe/ VP of Academic Affairs/ Office of Extended Learning								
1	Routine Correspondence	ACT + 1FY	0	ACT + 1FY	P S N U	ACT = until end of FY in which created or received.			
2	Continuing Education Class Information	ACT + 2FY	0	ACT + 2FY	P S N U	ACT = until end of FY in which created or received.			
3	Continuing Education Instructors	ACT + 3FY	0	ACT + 3FY	C S N U	ACT = until end of FY in which no longer employed			
4	Continuing Education Co-Sponsors	ACT + 3FY	0	ACT + 3FY	M S N I	ACT = until end of FY in which created or received.			
5	Continuing Education Financial Deposits	ACT + 5FY	0	ACT + 5FY	C S N I	ACT = until end of FY in which created or received.			
6	Purchase Requisitions/ Orders	ACT + 3FY	0	ACT + 3FY	M S N V	ACT = until end of FY in which audited.			
7	Annual Departmental Inventory	ACT + 5AY	0	ACT + 5AY	P S N I	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 DY - Day(s) PERM – Permanent		<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>			
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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks			
<b>066.000</b>	<b>University of Louisiana Monroe/ VP of Academic Affairs/ Office of Sponsored Programs &amp; Research</b>								
Item Number <sup>2</sup>	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Inventory	ACT + 2AY	0	ACT + 2AY	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	I	
4	Unit Budget	PERM	0	PERM	P	R	N	V	
5	Supervisor Files	ACT + 5CY	0	ACT + 5CY	M	S	N	I	ACT = until end of CY in which employee separates from agency.
6	Purchase Orders	ACT + 3FY	0	ACT + 3FY	P	S	N	V	ACT = until end FY in which audited.
7	Requisitions	ACT + 3FY	0	ACT + 3FY	P	S	N	U	ACT = until end FY in which created or received.
8	Proposal Checklists	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
9	Cost Share Documents	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
10	Consortium Agreements	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
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*July 8 2019*  
 Secretary of State, State Archives & Records Services

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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks			
<b>066.000</b>	<b>University of Louisiana Monroe/ VP of Academic Affairs/ Office of Sponsored Programs &amp; Research</b>								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
11	Unfunded Grants	ACT + 1FY	0	ACT + 1FY	M	S	N	U	ACT = until end FY in which grant closes.
12	Funded Grants	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
13	Conflict of Interest Forms	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
14	CITI Ethics Training	ACT + 3FY	0	ACT + 3FY	M	S	N	U	ACT = until end FY in which created or received.
15	Compensation Forms	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
16	Research Personnel Forms	ACT + 7FY	0	ACT + 7FY	M	S	N	V	ACT = until end FY in which grant closes.
17	Computing Center Forms	ACT + 7FY	0	ACT + 7FY	P	S	N	U	ACT = until end FY in which grant closes.
18	Deadline Variance Forms	ACT + 7FY	0	ACT + 7FY	M	S	N	I	ACT = until end FY in which grant closes.
19	Course Reduction Forms	ACT + 1FY	0	ACT + 1FY	M	S	N	I	ACT = until end FY in which grant closes.
20	Contract Master Budget Documents	ACT + 7FY	0	ACT + 7FY	M	S	N	I	ACT = until end FY in which grant closes.
<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 DY - Day(s) PERM – Permanent		<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> CITI = Collaborative Institutional Training Initiative			
		<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

9/12/19  
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*July S. Broussard*  
 Secretary of State, State Archives & Records Services

9/17/2019  
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Item Number	Records Series Title						In Office
<b>066.000</b>	<b>University of Louisiana Monroe/ VP of Academic Affairs/ Office of Sponsored Programs &amp; Research</b>						
21	Cost Share Transfer Forms	ACT + 7FY	0	ACT + 7FY	M S N V	ACT = until end FY in which grant closes.	
22	Grant Closeout Forms	ACT + 3FY	0	ACT + 3FY	P S N V	ACT = until end FY in which grant closes.	
23	No Cost Extension Forms	ACT + 1FY	0	ACT + 1FY	P S N U	ACT = until end FY in which grant closes.	
24	Human Subject Request to Review Forms	ACT + 3FY	0	ACT + 3FY	M S N I	ACT = until end FY in which created or received.	
25	IACUC Forms	PERM	0	PERM	C R N I		
26	Human Subject Approval Forms	ACT + 3FY	0	ACT + 3FY	P S N I	ACT = until end FY in which created or received.	
27	IBC Forms	PERM	0	PERM	P R N I		
28	Invention Disclosure Forms	PERM	0	PERM	C R N V		
29	UBMT Agreement Forms	PERM	0	PERM	C R N V	Made public after student notified.	
30	Reviewed Purchase Orders	ACT + 1FY	0	ACT + 1FY	P S N U	ACT = until end of FY in which record 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 DY - Day(s) PERM – Permanent		<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> IACUC = Institutional Animal Care and Use Committee IBC = Institutional Biosafety Committee UBMT = Uniform Biological Material Transfer	
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Andy G. Gimpin  
 Secretary of State, State Archives & Records Services

9/17/2019  
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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks			
Item Number	Records Series Title						Retention Period		
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066.000	University of Louisiana Monroe/ VP of Academic Affairs/ Office of Sponsored Programs & Research								
31	Communications with Grants Agency	M	S	N	V	ACT = until end of FY in which grant closes.			
32	Research Council Minutes	C	R	N	V				
33	Preliminary Misconduct Inquiry Notes	C	S	N	V	ACT = until end of FY in which created or received.			
34	Misconduct Inquiry Data and Notes	C	S	N	V	ACT = until end of FY in which created or received.			
35	Misconduct Investigation Notes and Data	C	S	N	V	ACT = until end of FY in which created or received.			
36	Correspondence to Office of Treatment Integrity	C	S	N	V	ACT = until end of FY in which created or received.			
37	Submitted Research Data	C	R	N	V				
38	Record of Staff Training	P	S	N	I	ACT = until end of FY in which created or received.			
39	Staff Confidentiality Agreement	P	S	N	U	ACT = until end of FY in which employee separates from program.			
<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 DY - Day(s) PERM – Permanent		<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>			
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Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ VP of Academic Affairs/ Office of Sponsored Programs & Research/ TRIO Programs								
1	Student Records – ETS + UB	ACT + 14FY	0	ACT + 14FY	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	I	U.S. Department of Education
4	ETS Supervisor Records	PERM	0	PERM	M	S	N	I	
5	UB Supervisor Records	PERM	0	PERM	M	S	N	I	
6	Copies of ETS Grant	PERM	0	PERM	P	R	N	I	Grant funded under 84.044A
7	Copies of UB Grant	PERM	0	PERM	P	R	N	I	Grant funded under 84.044A
8	Compansol (BLUMEN) Data System	PERM	0	PERM	C	R	N	I	
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066.000	University of Louisiana Monroe/ VP for Academic Affairs/ ULM Online								
Item Number	Records Series Title	Retention Period							
		In Office	In Storage	Total Retention					
1	Board of Regents	PERM	PERM	PERM	C	R	N	I	
2	Faculty Files	ACT+10FY	0	ACT+10FY	C	S	N	I	ACT = until end of FY in which employee is no longer with agency
3	Supervisor Files	ACT + 5FY	0	ACT + 5FY	M	S	N	I	ACT = until end of FY in which employee is no longer with agency
4	Student Records	PERM	0	PERM	C	S	N	V	
<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 DY - Day(s) PERM – Permanent		<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>		
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*Rodney S. Goulet*  
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<b>066.000</b>	<b>University of Louisiana Monroe/ Office of the President / Athletic Director</b>								
<b>1</b>	Athletic Grant-in-Aid Award Letters	C	S	N	V	ACT = until end of FY in which grant is closed			
<b>2</b>	NCAA Squad Lists & Eligibility Declarations	M	S	N	V	ACT = until end of AY in which created or received.			
<b>3</b>	NCAA Initial Eligibility Student – Athlete Reports	C	S	N	V	ACT = until end of AY in which created or received.			
<b>4</b>	NCAA Sports & Demographic Reports	M	S	N	V	ACT = until end of AY in which created or received.			
<b>5</b>	NCAA Certification of Compliance Forms	M	S	N	V	ACT = until end of AY in which created or received.			
<b>6</b>	Sport Participation Reports	M	S	N	V	ACT = until end of AY in which created or received.			
<b>7</b>	NCAA Declaration of Outside Income	C	S	N	V	ACT = until end of AY in which created or received.			
<b>8</b>	Declaration of Sport Playing Season	M	S	N	V	ACT = until end of AY in which created or received.			
<b>9</b>	Student – Athlete Transfer Information Forms	C	S	N	V	ACT = until end of AY in which created or received.			
<b>10</b>	Waivers for NCAA Legislation	M	S	N	V	ACT = until end of AY in which created or received.			
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Judy S. Gault  
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