

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](http://www.sos.la.gov)

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Remarks

Agency No	Agency / Division / Section								
066.000	University of Louisiana Monroe/ Office of the President / Athletic Director								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
11	NCAA Student – Athlete Statement	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which student no longer enrolled.
12	NCAA Drug Testing Statement	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which created or received.
13	Student – Athlete Compliance Paperwork	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which student no longer enrolled.
14	NCAA Secondary Infraction Reports	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which matter is resolved.
15	NCAA Student-Athlete Opportunity Fund Request	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which created or received.
16	NCAA Academic Performance Program Report	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which created or received.
17	Prospective Student-Athlete Official Visit Records	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which created or received.
18	Coaching Staff Recruiting Logs	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which created or received.
19	NCAA Rules Education Documents	ACT + 6AY	0	ACT + 6AY	C	S	N	V	ACT = until end of AY in which created or received.

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 DY - Day(s) PERM – Permanent	Security Status Codes P – Public Record M – May Contain Confidential Information C – Confidential Information Archival Processing Codes A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)	State Records Center Use Y – Yes N - No Vital Record Identification Code V= Vital I = Important U= Useful	Agency Abbreviations NCAA = National Collegiate Athletic Association
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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

Barbara S. Smith
 Secretary of State, State Archives & Records Services

9/17/2019
 Date Approved

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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 Administrative Officer								
1	Check Requests and Requisitions	ACT + 3FY	0	ACT + 3FY	M	S	N	V	ACT = until end of FY in which audited.
2	Travel	ACT + 3FY	0	ACT + 3FY	M	S	N	V	ACT = until end of FY in which audited.

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Heather R. Pilcher
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July 8 2019
 Secretary of State, State Archives & Records Services

9/17/2019
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Chief Administrative Officer/ Facilities, Capital Projects, and Environmental Health & Safety								
1	Architectural Files	PERM	0	PERM	M	R	N	I	
2	Payroll Action Forms	ACT + 2FY	3FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
3	Capital Outlay Requests Budgets	ACT + 5FY	5FY	ACT + 10FY	P	S	N	U	ACT = until end of FY in which created or received.
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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks
Item Number	Records Series Title					
066.000	University of Louisiana Monroe/ Chief Administrative Officer/ Physical Plant					
1	Key Request Forms	PERM	0	PERM	M R N U	
2	Preventive Maintenance Work Orders	ACT + 3FY	0	ACT + 3FY	M S N U	ACT = until end of FY in which created or received.
3	Interdepartmental Billing	ACT + 3FY	0	ACT + 3FY	M S N U	ACT = until end of FY in which created or received.
4	Fire Marshall Inspections	ACT + 5FY	0	ACT + 5FY	M S N U	ACT = until end of FY in which created or received.
5	Vehicle Log Sheets/ Gas Tickets	ACT + 3FY	0	ACT + 3FY	M S N U	ACT = until end of FY in which created or received.
6	Payroll Records	ACT + 5CY	0	ACT + 5CY	M S N U	ACT = until end of CY in which created or received.
7	Warehouse Requisitions	ACT + 3FY	3FY	ACT + 6FY	M S N U	ACT = until end of FY in which created or received.
8	Service Request	ACT + 3FY	0	ACT + 3FY	M S N U	ACT = until end of FY in which created or received.
9	General Supervisor Files	PERM	0	PERM	M S N I	
10	Purchase Orders	ACT + 3FY	0	ACT + 8FY	M S N U	ACT = until end of FY in which created or received.
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Item Number	Records Series Title					
066.000	University of Louisiana Monroe/ Chief Administrative Officer/ Physical Plant					
11	Payroll Vouchers	ACT + 2FY	2FY	ACT + 4FY	M S N U	ACT = until end of FY in which created or received.
12	Project Director General Files	ACT + 2FY	2FY	ACT + 4FY	M S N U	ACT = until end of FY in which created or received.
13	Correspondence	ACT + 3FY	0	ACT + 3FY	M S N U	ACT = until end of FY in which created or received.
14	Construction Files	ACT + 10FY	PERM	PERM	M R N U	ACT = until end of FY in which created or received.
15	Utility Billing	ACT + 6FY	6FY	ACT + 12FY	M S N U	ACT = until end of FY in which created or received.
16	Fleet Management Reports	ACT + 6FY	6FY	ACT + 12FY	M S N U	ACT = until end of FY in which created or received.
17	Mechanical Engineer Files	PERM	PERM	PERM	M R N U	
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Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Remarks	
Item Number	Records Series Title						In Office
066.000	University of Louisiana Monroe/ Chief Administrative Officer/ Property Control						
1	Land Acquisitions Records	PERM	0	PERM	M R N I		
2	Tagging Sheets	PERM	0	PERM	M R N U		
3	Invoices	PERM	0	PERM	M R N U		
4	Vehicle Files	PERM	0	PERM	M R N U		
5	Stolen Property Police Reports	ACT + 5CY	0	ACT + 5CY	M S N U	ACT = until end of CY in which created or received.	
6	ORM Exposure Reports	ACT + 5CY	0	ACT + 5CY	M S N U	ACT = until end of CY in which created or received.	
7	LPAA Reports	ACT + 10CY	0	ACT + 10CY	M S N U	ACT = until end of CY in which created or received.	
8	Building Files	PERM	0	PERM	M R N U		
9	Original Requests	ACT + 5CY	0	ACT + 5CY	M S N U	ACT = until end of CY in which created or received. Property control request forms from campus offices.	
10	Property Control (PC) Forms	ACT + 10CY	0	ACT + 10CY	M S N U	ACT = until end of CY in which created or received. Completed forms for property inventory changes which are needed for reference.	
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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			

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Item Number	Records Series Title						Retention Period		
							In Office	In Storage	Total Retention
066.000	University of Louisiana Monroe/ Chief Administrative Officer/ Property Control								
11	Monthly Transmittals	ACT + 5CY	0	ACT + 5CY	M	S	N	U	ACT = until end of CY in which created or received.
12	Certification of Inventory	ACT + 10CY	0	ACT + 10CY	P	S	N	I	ACT = until end of CY in which created or received.
13	BF11 File	ACT + 10CY	0	ACT + 10CY	M	S	N	U	ACT = until end of CY in which created or received.
14	Transfer Records	ACT + 10CY	0	ACT + 10CY	M	S	N	U	ACT = until end of CY in which created or received.
15	End of Year Printouts	ACT + 5CY	0	ACT + 5CY	M	S	N	U	ACT = until end of CY in which created or received.
16	BF11 Logs	ACT + 5CY	0	ACT + 5CY	M	S	N	U	ACT = until end of CY in which created or received.
17	General Correspondence	ACT + 5CY	0	ACT + 5CY	P	S	N	U	ACT = until end of CY in which created or received.
18	LPAA Inventory Purge	ACT + 5CY	0	ACT + 5CY	P	S	N	I	ACT = until end of CY in which created or received.
19	LPAA Net Change Report	ACT + 15CY	0	ACT + 15CY	M	S	N	U	ACT = until end of CY in which created or received.
20	Purchase Orders	ACT + 5CY	0	ACT + 5CY	M	S	N	U	ACT = until end of CY 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
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July 8 2019
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Item Number	Records Series Title						Retention Period		
							In Office	In Storage	Total Retention
066.000	University of Louisiana Monroe/ Vice President for Business Affairs								
1	Correspondence Files	ACT + 5FY	0	ACT + 5FY	M S N I	ACT = until end of FY in which created or received.			
2	Board of Supervisors Files	ACT + 5FY	5FY	ACT + 10FY	M S N I	ACT = until end of FY in which created or received.			
3	Board of Regents files	ACT + 5FY	5FY	ACT + 10FY	M S N I	ACT = until end of FY in which created or received.			
4	Legislative Auditor files	PERM	0	PERM	M R N V				
5	Purchase Requisition Files	ACT + 5FY	0	ACT + 5FY	M S N I	ACT = until end of FY in which created or received.			
6	Project Files	ACT + 5FY	5FY	ACT + 10FY	M S N I	ACT = until end of FY project is completed.			
7	Job Search Pre-approval and Justification Forms	ACT + 10FY	PERM	PERM	C R N I	ACT = until end of FY in which created or received.			

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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/ Vice President for Business Affairs/ Executive Director for Auxiliary Enterprises (Administrative Records)								
1	Beverage Contract/ Accounting Documents	ACT + 2FY	9FY	ACT + 11FY	P	S	N	I	ACT = until end of FY in which contract lapses
2	Snack Contract/ Accounting Documents	ACT + 2FY	9FY	ACT + 11FY	P	S	N	I	ACT = until end of FY in which contract lapses
3	Miscellaneous Contracts/ Accounting Documents	ACT + 2FY	9FY	ACT + 11FY	P	S	N	I	ACT = until end of FY in which contract lapses
4	Working Files	ACT + 2FY	9FY	ACT + 11FY	P	S	N	I	ACT = until end of FY in which created or received.

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Judy S. Smith
 Secretary of State, State Archives & Records Services

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				In Office	In Storage	Total Retention						
066.000	University of Louisiana Monroe/ Vice President for Business Affairs/ Executive Director for Auxliary Enterprises/ University Bookstore											
		1	Bookstore Contract/ Accounting Documents	ACT + 3FY	7FY	ACT + 10FY	P	S	N	I	ACT = until end of FY in which contract lapses.	
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