

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

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<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	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/ Vice President for Business Affairs/ Controller/ Accounts Payable								
1	Purchase Orders	ACT + 2FY	3FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
2	Travel Reimbursement Files	ACT + 2FY	3FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
3	1099's & Worksheets	ACT + 2FY	PERM	PERM	C	R	N	I	ACT = until end of FY 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
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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

Rudolph S. Bynum Jr.
 Secretary of State, State Archives & Records Services

9/17/2019
 Date Approved

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Item Number	Records Series Title	In Office	In Storage	Total Retention					
		066.000	University of Louisiana Monroe/ Vice President for Business Affairs/ Controller/ General Accounting						
1	Bank Reconciliations	ACT + 2FY	3FY	ACT + 5FY	M	S	N	V	ACT = until end of FY in which audited.
2	Unclaimed Property Report	ACT + 2FY	3FY	ACT + 5FY	M	S	N	V	ACT = until end of FY in which audited
3	Investment and Banking Documents	ACT + 5FY	10FY	ACT + 15FY	C	S	N	U	ACT = until end of FY in which created or received.

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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

Betsy S. Campbell
 Secretary of State, State Archives & Records Services

9/17/2019
 Date Approved

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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/ Controller/ Student Accounts								
1	Bankruptcy Filing	ACT + 1FY	3FY	ACT + 4FY	C	S	N	U	ACT = until end of FY in which created or received.
2	Bankruptcy Discharge	ACT + 1FY	3FY	ACT + 4FY	C	S	N	U	ACT = until end of FY in which created or received.
3	Statement of Account	ACT + 2FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.
4	Collection Agency Status Reports	ACT + 2FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.
5	Banner Check Register	ACT + 3FY	PERM	PERM	M	R	N	U	ACT = until end of FY in which created or received.
6	Affidavit of Lost, Destroyed, or Stolen Checks	ACT + 1FY	2FY	ACT + 3FY	M	S	N	U	ACT = until end of FY in which created or received.
7	Numbered Adjustments Voucher	ACT + 3FY	PERM	PERM	M	R	N	U	ACT = until end of FY in which created or received.
8	1098T	ACT + 1FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.
9	Fee Schedule & Calendars	ACT + 10FY	PERM	PERM	P	R	N	U	ACT = until end of FY in which created or received.
10	Warhawk Express Cancellation Request	ACT + 7FY	0	ACT + 7FY	C	S	N	U	ACT = until end of FY in which created or received.
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[Signature]
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Vice President for Business Affairs/ Controller/ Student Accounts								
11	Manual Adjustment	ACT + 2FY	PERM	PERM	M	R	N	U	ACT = until end of FY in which created or received.
12	Third Party Billing Reconciliations	ACT + 1FY	2FY	ACT + 3FY	M	S	N	U	ACT = until end of FY in which created or received.
13	Banner Rate Tables	ACT + 5FY	0	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
14	Refund Check Registers	ACT + 5FY	0	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
15	SIS Balance	ACT + 5FY	0	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.
16	1098T – Tax	ACT + 5FY	0	ACT + 5FY	C	S	N	V	ACT = until end of FY in which created or received.
17	Outstanding Debt	ACT + 5FY	0	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.
18	Check Register	ACT + 5FY	0	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
19	Check Register Outstanding Debt	ACT + 5FY	0	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.
20	Hurricane Katrina – Special Circumstances	ACT + 1FY	PERM	PERM	C	R	N	U	ACT = until end of FY 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				

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[Signature]
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Vice President for Business Affairs/ Controller/ Student Accounts								
21	Quarterly Debt (AR) Reports	ACT + 1FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.
22	Appeals Payment Information Files	ACT + 1FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.
23	Third Party Invoices and Waivers Files	ACT + 1FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.
24	Third Party Billing Files	ACT + 1FY	PERM	PERM	C	R	N	I	ACT = until end of FY in which created or received.

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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

Randy S. Brown
 Secretary of State, State Archives & Records Services

9/17/2019
 Date Approved

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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/ Controller/ Financial Reporting								
1	Financial Statements	ACT + 10FY	PERM	PERM	P	R	N	V	ACT = until end of FY in which created or received.
2	Work Papers for Financial Statements	ACT + 10FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
3	Miscellaneous Scholarship Receivables Reconciliation Reports	ACT + 2FY	3FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
4	Scholarship Receivables Reconciliation Reports	ACT + 2FY	3FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
5	All Scholarship Reconciliation Reports	ACT + 2FY	3FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.
6	Bank Reconciliation Reports	ACT + 2FY	3FY	ACT + 5FY	M	S	N	V	ACT = until end of FY in which audited
7	Unclaimed Property Reports	ACT + 2FY	3FY	ACT + 5FY	M	S	N	I	ACT = until end of FY in which created or received.
8	Accounts Receivable Sub-Ledgers Reports	ACT + 2FY	3FY	ACT + 5FY	M	S	N	I	ACT = until end of FY in which created or received.
9	Banner A/R Reconciliation Reports	ACT + 5FY	0	ACT + 5FY	M	S	N	V	ACT = until end of FY in which audited
10	Banner Student Payable Reconciliation Reports	ACT + 5FY	0	ACT + 5FY	M	S	N	V	ACT = until end of FY in which audited
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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

9/12/19
Date Signed

Geoffrey J. 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	C	S	N	U	
		11	Banner Unapplied Cash and Financial Aid Files	ACT + 2FY					
12	Return Checking Working Files	ACT + 2FY	3FY	ACT + 5FY					ACT = until end of FY in which created or received.
13	Graduate Assistant Waivers Receivable Reconciliation Reports	ACT + 2FY	3FY	ACT + 5FY					ACT = until end of FY in which created or received.
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Heather R. Pilcher
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Josh 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/ Vice President for Business Affairs/ Controller/ Student Loans									
1	NBD 060 Report	ACT + 1FY	4FY	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.	
2	EOM (End of the Month) Report	ACT + 1FY	4FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which created or received.	
3	LMS Mid-Month & End of Month Report	ACT + 1FY	4FY	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.	
4	HPSL – Total Cancellations Report	ACT + 1FY	4FY	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.	
5	NDSL – Total Cancellations Report	ACT + 1FY	4FY	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.	
6	EOF (End of Year) Report	PERM	0	PERM	M	R	N	I	ACT = until end of FY in which created or received.	
7	Discrepancy List Report	ACT + 5FY	0	ACT + 5FY	M	S	N	V	ACT = until end of FY in which audited	
8	LMS Paid in Full Files	ACT + 1FY	4FY	ACT + 5FY	C	S	N	U	ACT = until end of FY in which created or received.	
9	Federal Loans Outstanding	ACT + 1FY	4FY	ACT + 5FY	M	S	N	U	ACT = until end of FY in which paid in full or transferred.	
10	Federal Government NDSL Report	ACT + 2FY	4FY	ACT + 5FY	C	S	N	U	ACT = until end of FY 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

9/12/19
 Date Signed

Boyd S. Gump
 Secretary of State, State Archives & Records Services

9/17/2019
 Date Approved

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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/ Vice President for Business Affairs/ Controller/ Student Loans					
11	Health Professional Loans - Nursing Loans Purchased by ULM Report	C	S	N	U	ACT = until end of FY in which created or received.
12	Paid in Full Accounts (Folders) Files	C	S	N	U	ACT = until end of FY in which created or received.
13	Paid Out Files	C	S	N	U	ACT = until end of FY in which created or received.
14	NBD 060 Feed Journal Report	M	S	N	U	ACT = until end of FY in which created or received.
15	Learning Management System Daily Payments Report	C	S	N	U	ACT = until end of FY in which created or received.
16	Tuition Payments Report	C	R	N	I	ACT = until end of FY in which created or received.
17	End of the Year Report	C	R	N	U	ACT = until end of FY in which created or received.
18	End of the Year NJY 600/630 cohort (01-03) Report	C	R	N	U	ACT = until end of FY in which created or received.

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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

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

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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	M	S	N	I		
		066.000	University of Louisiana Monroe/ Vice President for Business Affairs/ Controller/ Grants and Contracts							
1	Grant Folders	ACT + 6CY	0	ACT + 6CY	M	S	N	I	ACT = until end of CY in which grant is closed out.	
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			State Records Center Use Y – Yes N - No			Agency Abbreviations		
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