

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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Remarks

Agency No	Agency / Division / Section								
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Dean of Students/ Affinity Health Center Liaison								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Healthcare Professional Students-Immunization Compliance Records	ACT + 2CY	28CY	ACT + 30CY	M	S	N	U	ACT = until end of CY in which created or received.
2	Employee Incident and Accident Reports	ACT + 2CY	28CY	ACT + 30CY	N	S	N	U	ACT = until end of CY in which created or received.
3	Student Clinical Records	ACT + 5CY	5CY	ACT + 10CY	C	S	N	I	ACT = until end of CY in which created or received.
4	Physician Standing Orders	ACT + 1CY	PERM	PERM	C	R	N	I	ACT = until end of CY in which created or received.
5	Purchasing/Receiving Orders/Requisitions	ACT + 3FY	0	ACT + 3FY	M	S	N	U	ACT = until end of FY in which created or received.
6	Policy and Procedure Manual	ACT + 1 CY	PERM	PERM	P	R	N	V	ACT = Until end of CY in which superseded
7	Clinic Daily Reports-Credit Card, Warhawk Express, and Cash Receipts	ACT + 1CY	4CY	ACT + 5CY	P	S	N	U	ACT = until end of CY in which created or received.
8	Clinic Monthly Reports – Monthly Statistical Records and STD Reports	ACT + 1CY	4CY	ACT + 5CY	M	S	N	U	ACT = until end of CY in which created or received.
9	Memos	ACT + 1MO	0	ACT + 1MO	P	S	N	U	ACT = until end of CY in which created or received.
10	Stock Drug Usage Record	ACT + 5FY	0	ACT + 5FY	C	S	N	U	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 STD = Sexually Transmitted Disease
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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

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

9/17/2019
 Date Approved

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		In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Dean of Students/ Affinity Health Center Liaison								
11	Time/ Attendance/ Vacation Records	ACT + 5FY	0	ACT + 5FY	M	S	N	I	ACT = until end of FY in which created or received.
12	Student Health Services/ Immunization Clinic Inventory	ACT + 3CY	0	ACT + 3CY	P	S	N	I	ACT = until end of CY in which created or received.
13	Proof of Immunization Compliance Forms	ACT + 1CY	9CY	ACT + 10CY	C	S	N	U	ACT = until end of CY in which created or received.
14	Laboratory Records – Controls, Temperature, Etc.	ACT + 5CY	0	ACT + 5CY	C	S	N	U	ACT = until end of CY in which created or received.

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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Career Connections								
1	Career Days	ACT + 3CY	0	ACT + 3CY	M	S	N	I	ACT = until end of CY in which created or received.
2	Credentials/ Resumes	ACT + 3CY	0	ACT + 3CY	M	S	N	I	ACT = until end of CY in which created or received.
3	Employee Interview Sign-Up Forms	ACT + 3CY	0	ACT + 3CY	M	S	N	I	ACT = until end of CY in which created or received.
4	Correspondence	ACT + 3CY	0	ACT + 3CY	M	S	N	I	ACT = until end of CY in which created or received.
5	Surveys	PERM	0	PERM	P	R	N	I	Graduation, Career Fair

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Agency No	Agency / Division / Section								
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Counseling Center								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Accounts Payable/Receivable	ACT + 3FY	0	ACT + 3FY	M	S	N	V	ACT = until end of FY in which audited
2	Supervisor Files	ACT + 5CY	0	ACT + 5CY	M	S	N	I	ACT = until end of CY in which employee separates from agency.
3	Client Correspondence	ACT + 3FY	0	ACT + 3FY	C	S	N	U	ACT = until end of FY in which created or received. Each counselor has a correspondence file.
4	Elevator Request Form	ACT + 3FY	0	ACT + 3FY	C	S	N	U	ACT = until end of FY in which created or received. Form has disability information related to student requiring elevator access.
5	Client Folders	ACT + 5FY	5FY	ACT + 10FY	C	S	N	I	ACT = until end of FY in which no longer a client.
6	Special Needs Folders	ACT + 5FY	5FY	ACT + 10FY	C	S	N	I	ACT = until end of FY in which created or received.
7	Fire and Safety Drill Reports	ACT + 3FY	0	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.
8	Property Control Inventory Reports	ACT + 3FY	0	ACT + 3FY	P	S	N	I	ACT = until end of FY in which created or received.

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Item Number	Records Series Title	In Office	In Storage	Total Retention						
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Environmental Analysis Lab									
1	Purchase Orders	ACT + 3FY	0	ACT + 3FY	P	S	N	I	ACT = until end of FY in which created or received.	
2	General Accreditation Files	ACT + 10FY	0	ACT + 10FY	P	S	N	I	ACT = until end of FY in which created or received.	
3	Contracts	ACT + 10FY	0	ACT + 10FY	P	S	N	I	ACT = until end of FY in which contract lapses.	
4	Correspondence-Routine	ACT + 2FY	0	ACT + 2FY	P	S	N	U	ACT = until end of FY in which created or received.	
5	Fee Schedules	ACT + 1FY	1FY	ACT + 2FY	P	S	N	U	ACT = until end of FY schedule superseded or abolished.	
6	Forms	ACT	PERM	PERM	P	R	N	I	ACT = until end of FY in which created or received.	
7	Inventory	ACT + 5FY	0	ACT + 5FY	P	S	N	I	ACT = until end of FY in which created or received.	
8	Equipment Information	ACT + 2FY	0	ACT + 2FY	P	S	N	I	ACT = until end of FY equipment disposed or in surplus.	
9	Travel	ACT + 3FY	0	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.	
10	Accounts Receivable	ACT + 1FY	0	ACT + 1FY	P	S	N	V	ACT = until end of FY in which audited.	
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Environmental Analysis Lab								
11	Supervisor Files	ACT + 5CY	0	ACT + 5CY	M	S	N	I	ACT = until end of CY in which employee separates from agency.
12	Invoices	ACT + 10FY	0	ACT + 10FY	P	S	N	V	ACT = until end of FY in which created or received.
13	Receipts and Statement Cards	ACT + 10FY	0	ACT + 10FY	P	S	N	V	ACT = until end of FY in which created or received.
14	Analysis Reports	ACT + 10FY	0	ACT + 10FY	P	S	N	I	ACT = until end of FY in which created or received.
15	Accounts Payable	ACT + 10FY	0	ACT + 10FY	P	S	N	V	ACT = until end of FY in which audited
16	Detector File	PERM	0	PERM	P	R	N	I	
17	Accreditation QA/QC	ACT + 10FY	0	ACT + 10FY	P	S	N	I	ACT = until end of FY in which created or received.
18	Time and Attendance Records	ACT + 2FY	1FY	ACT + 3FY	P	S	N	V	ACT = until end of FY in which created or received.
19	Budget	PERM	0	PERM	P	R	N	I	
20	Sample Reports and Data	ACT + 10FY	0	ACT + 10FY	P	S	N	I	ACT = until end of FY in which created or received.
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Recreational Services								
1	Payroll	ACT + 1CY	4FY	ACT + 5CY	M	S	N	U	ACT = until end of CY in which created or received.
2	Bookstore Orders	ACT + 1FY	2FY	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.
3	Check Requests	ACT + 1FY	2FY	ACT + 3FY	M	S	N	U	ACT = until end of FY in which created or received.
4	Deposits	ACT + 1FY	2FY	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.
5	Interdepartmental Requests	ACT + 1FY	2FY	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.
6	Purchase Requisitions	ACT + 1FY	2FY	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.
7	Purchase Orders	ACT + 1FY	2FY	ACT + 3FY	P	S	N	U	ACT = until end of FY in which created or received.
8	Travel Documents	ACT + 2FY	2FY	ACT + 4FY	M	S	N	U	ACT = until end of FY in which created or received.
9	Supervisor Files	ACT + 1FY	4CY	ACT + 5CY	M	S	N	I	ACT = until end of CY in which employee separates form agency
10	Facility Rental Documents	ACT + 2FY	2FY	ACT + 4FY	P	S	N	U	ACT = until end of FY rental period expires or is terminated.
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Heather R. Pilcher
 Agency Approval

9/12/19
 Date Signed

Rudy S. Gentry
 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 Student Affairs/ Recreational Services						
11	Property Control Inventory Records	ACT + 2FY	2FY	ACT + 4FY	P	S	N	I	ACT = until end of FY in which created or received.
12	Injury and Accident Reports	ACT + 4FY	2FY	ACT + 6FY	C	S	N	U	ACT = until end of FY in which matter is resolved.
13	Police reports	ACT + 2FY	2FY	ACT + 4FY	C	S	N	U	ACT = until end of FY in which created or received.
14	Telephone Logs	ACT	1FY	ACT + 1FY	M	S	N	U	ACT = until end of FY in which created or received.
15	Departmental Annual Reports	PERM	0	PERM	P	R	N	U	
16	Blue Prints/ Floor Plans	PERM	0	PERM	P	R	N	U	
17	Disciplinary File	PERM	0	PERM	C	R	N	U	
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Heather R. Pilcher
 Agency Approval

9/12/19
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Geoffrey S. Smith
 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					
		1	CAB, Spirit Groups and SGA Budget	PERM					0
2	CAB, Spirit Groups and SGA Minutes	PERM	0	PERM	P	R	N	U	
3	CAB, Spirit Groups and SGA Constitution	PERM	0	PERM	P	R	N	U	

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 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
 CAB = Campus Activities Board
 SGA = Student Government Association

Heather R. Pilcher
 Agency Approval

9/12/19
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Betsy S. Smylie
 Secretary of State, State Archives & Records Services

9/17/2019
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066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ University Police								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Security Reports (Building/ Campus Safety)	ACT + 2CY	0	ACT + 2CY	P	S	N	I	ACT = until end of CY in which created or received.
2	Timesheets, Leave Reports, Overtime	ACT + 3CY	0	ACT + 3CY	M	S	N	I	ACT = until end of CY in which created or received.
3	Reports of Incidents	PERM	0	PERM	C	R	N	I	
4	Supervisor Records	ACT + 5CY	0	ACT + 5CY	M	S	N	I	ACT = until end of CY in which no longer employed.
5	Parking/ Traffic Financial Control Forms	ACT + 2CY	0	ACT + 2CY	M	S	N	I	ACT = until end of CY in which created or received.
6	Uniform Crime Reports	ACT + 3CY	0	ACT + 3CY	P	S	N	I	ACT = until end of CY in which created or received.
7	Police Dispatch Logs	PERM	0	PERM	C	R	N	I	
8	Accounts Payable	ACT + 5CY	0	ACT + 5CY	M	S	N	V	ACT = until end of CY in which audited.
9	Vehicle Registration	ACT + 1CY	0	ACT + 1CY	P	S	N	I	ACT = until end of CY in which registration expires.
10	Parking Citation Files	ACT + 3CY	0	ACT + 3CY	M	S	N	I	ACT = until end of CY in which created or received.
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Agency No	Agency / Division / Section							
066.000	University of Louisiana Monroe/ Vice President for Student Affairs/ Bayou Pointe Event Center							

Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Invoices	ACT + 2FY	0	ACT + 2FY	M	S	N	V	ACT = until end of FY in which audited.

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Teresa Hardy <teresa.hardy@sos.la.gov>

ULM Retention Schedule

1 message


Heather Pilcher <hpilcher@ulm.edu>

Fri, Sep 13, 2019 at 8:18 AM

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