

Records Retention Schedule

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

SSARC-932 (09/20)

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recmgt@sos.la.gov

Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Indicate Use of Form <input type="checkbox"/> ORIGINAL SUBMISSION <input type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input checked="" type="checkbox"/> ADDENDUM PAGE
066.000	University of Louisiana Monroe / Office of the President								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Board of Supervisors	ACT + 8 FY	0	ACT + 8 FY	P	S	N	I	ACT = until end of FY in which created or received.
2	Board of Regents	ACT + 8 FY	0	ACT + 8 FY	P	S	N	I	ACT = until end of FY in which created or received.
3	General Correspondence	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end of FY in which created or received.
4	Legal	ACT + 5 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which matter closed.
5	President's Correspondence	ACT + 5 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
6	University Construction Files	ACT + 4 FY	PERM	PERM	P	R	N	V	ACT = until end of FY in which project completed.
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 (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).		Security Status Codes P – Public Record M – May Contain Confidential Information C – Confidential Information		State Records Center Use Y – Yes N - No		Agency Abbreviations			
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

1/10/2024
Date Signed

Amy Herrera
Secretary of State, State Archives & Records Services

JAN 22 2024
Date Approved

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☐ 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					
066.000	University of Louisiana Monroe / Office of the President / Athletic Director & Athletic Compliance								
1	Athletic Grant-in-Aid Award Letters	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of FY in which grant is closed.
2	NCAA Squad Lists & Eligibility Declarations	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
3	NCAA Initial Eligibility Student – Athlete Reports	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
4	NCAA Sports & Demographic Reports	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
5	NCAA Certification of Compliance Forms	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
6	Sport Participation Reports	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
7	NCAA Declaration of Outside Income	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
8	Declaration of Sport Playing Season	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
9	Student – Athlete Transfer Information Forms	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
10	Waivers for NCAA Legislation	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which created or received.
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Heather R. Pilcher

Agency Approval

1/10/2024

Date Signed

Amy Moran

Secretary of State, State Archives & Records Services

JAN 22 2024

Date Approved

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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					
066.000	University of Louisiana Monroe / Office of the President / Athletic Director & Athletic Compliance								
11	NCAA Student – Athlete Statement	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which student no longer enrolled.
12	NCAA Drug Testing Statement	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
13	Student – Athlete Compliance Paperwork	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which student no longer enrolled.
14	NCAA Secondary Infraction Reports	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which matter is resolved.
15	NCAA Student-Athlete Opportunity Fund Request	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
16	NCAA Academic Performance Program Report	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
17	Prospective Student-Athlete Official Visit Records	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
18	Coaching Staff Recruiting Logs	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
19	NCAA Rules Education Documents	ACT + 6 AY	0	ACT + 6 AY	C	S	N	V	ACT = until end of AY in which created or received.
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Amy Moran

Secretary of State, State Archives & Records Services

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Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Indicate Use of Form	
066.000	University of Louisiana Monroe / Office of the President / Internal Audit								<input type="checkbox"/> ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input type="checkbox"/> ADDENDUM PAGE	
Item Number	Records Series Title	Retention Period							Remarks	
		In Office	In Storage	Total Retention						
1	Internal Audit Working Papers	ACT + 3 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.	
2	Legislative Auditor/Internal Audit	ACT + 10 FY	PERM	PERM	M	R	N	V	ACT = Until end of FY in which matter is closed.	
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066.000	University of Louisiana Monroe / Office of the President / Office of Institutional Legal, Equity & Title IX Compliance								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Case Files	PERM	0	PERM	M	R	N	V	
2	University Policies	PERM	0	PERM	M	R	N	V	
3	University Training Records	PERM	0	PERM	M	R	N	V	
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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					
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research								
1	Inventory	ACT + 2 AY	0	ACT + 2 AY	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	V	
4	Unit Budget	PERM	0	PERM	P	R	N	V	
5	Supervisor Files	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end CY in which employee separates from agency.
6	Purchase Orders	ACT + 3 FY	0	ACT + 3 FY	P	S	N	V	ACT = until end FY in which audited.
7	Requisitions	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end FY in which created or received.
8	Proposal Checklists	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
9	Cost Share Documents	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
10	Consortium Agreements	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
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Agency No 066.000		Agency / Division / Section University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research			Security	Archival	State Records Center	Vital	Indicate Use of Form			
Item Number		Records Series Title							Retention Period		<input type="checkbox"/> ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input type="checkbox"/> ADDENDUM PAGE	
									In Office	In Storage	Total Retention	Remarks
11		Unfunded Grants			ACT + 1 FY	0	ACT + 1 FY	M	S	N	U	ACT = until end FY in which grant closes.
12		Funded Grants			ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
13		Conflict of Interest Forms			ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
14		CITI Ethics Training			ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end FY in which created or received.
15		Compensation Forms			ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
16		Research Personnel Forms (Departmental Copy)			ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.
17		Computing Center Forms			ACT + 7 FY	0	ACT + 7 FY	P	S	N	U	ACT = until end FY in which grant closes.
18		Deadline Variance Forms			ACT + 7 FY	0	ACT + 7 FY	M	S	N	I	ACT = until end FY in which grant closes.
19		Course Reduction Forms			ACT + 1 FY	0	ACT + 1 FY	M	S	N	I	ACT = until end FY in which grant closes.
20		Contract Master Budget Documents			ACT + 7 FY	0	ACT + 7 FY	M	S	N	I	ACT = until end FY in which grant closes.
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Heather R. Pilcher
Agency Approval

1/10/2024
Date Signed

Amy Meran
Secretary of State, State Archives & Records Services

JAN 22 2024
Date Approved

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Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Indicate Use of Form	
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / Sponsored Programs & Research								<input type="checkbox"/> ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input type="checkbox"/> ADDENDUM PAGE	
Item Number	Records Series Title	Retention Period							Remarks	
		In Office	In Storage	Total Retention						
21	Cost Share Transfer Forms	ACT + 7 FY	0	ACT + 7 FY	M	S	N	V	ACT = until end FY in which grant closes.	
22	Grant Closeout Forms	ACT + 3 FY	0	ACT + 3 FY	P	S	N	V	ACT = until end FY in which grant closes.	
23	No Cost Extension Forms	ACT + 1 FY	0	ACT + 1 FY	P	S	N	U	ACT = until end FY in which grant closes.	
24	Human Subject Request to Review Forms	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end FY in which created or received.	
25	IACUC Forms	PERM	0	PERM	C	R	N	V		
26	Human Subject Approval Forms	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end FY in which created or received.	
27	IBC Forms	PERM	0	PERM	P	R	N	V		
28	Invention Disclosure Forms	PERM	0	PERM	C	R	N	V		
29	UBMT Agreement Forms	PERM	0	PERM	M	R	N	V	Made public after student notified.	
30	Reviewed Purchase Orders	ACT + 1 FY	0	ACT + 1 FY	P	S	N	U	ACT = until end of FY in which record created or received.	
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Heather R. Pilcher
Agency Approval

1/10/2024
Date Signed

Amy Moran
Secretary of State, State Archives & Records Services

JAN 22 2024
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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 Innovation & Research Officer / Sponsored Programs & Research								
31	Communications with Grants Agency	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which grant closes.
32	Research Council Minutes	PERM	PERM	PERM	C	R	N	V	
33	Preliminary Misconduct Inquiry Notes	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
34	Misconduct Inquiry Data and Notes	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
35	Misconduct Investigation Notes and Data	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
36	Correspondence to Office of Treatment Integrity	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
37	Submitted Research Data	PERM	PERM	PERM	C	R	N	V	
38	Record of Staff Training	ACT + 1 FY	0	ACT + 1 FY	P	S	N	I	ACT = until end of FY in which created or received.
39	Staff Confidentiality Agreement	ACT + 1 FY	0	ACT + 1 FY	P	S	N	U	ACT = until end of FY in which employee separates from program.
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Cathy Mera
Secretary of State, State Archives & Records Services

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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Chief Innovation & Research Officer / TRIO Program								
1	Student Records – ETS + UB	ACT + 14 FY	0	ACT + 14 FY	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	V	U.S. Department of Education
4	ETS Supervisor Records	PERM	0	PERM	M	S	N	V	
5	UB Supervisor Records	PERM	0	PERM	M	S	N	V	
6	Copies of ETS Grant	PERM	0	PERM	P	R	N	V	Grant funded under 84.044A
7	Copies of UB Grant	PERM	0	PERM	P	R	N	V	Grant funded under 84.044A
8	Compansol (BLUMEN) Data System	PERM	0	PERM	C	R	N	V	

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Security Status Codes
P – Public Record
M – May Contain Confidential Information
C – Confidential Information

Archival Processing Codes
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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
ETS – Educational Talent Search
UB – Upward Bound

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Date Signed

Amy Moran

Secretary of State, State Archives & Records Services

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