

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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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 / Executive Director ULM Foundation & Alumni Relations								<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			Security	Archival	State Records Center	Vital	Remarks	
		In Office	In Storage	Total Retention						
1	Alumni Association Board Meeting Minutes	PERM	0	PERM	M	R	N	V		
2	Contracts	ACT + 10 FY	0	ACT + 10 FY	M	S	N	I	ACT = until the end of FY in which contract lapses.	
3	Event Records	ACT + 2 FY	0	ACT + 2 FY	P	S	N	U	ACT = until the end of FY in which created or received.	
4	Planned Donation Files	PERM	0	PERM	M	R	N	V		
5	Endowments	PERM	0	PERM	M	R	N	V		
6	ULM Athletic Foundation Minutes	PERM	0	PERM	M	R	N	V		
7	ULM Athletic Foundation Audit	PERM	0	PERM	M	R	N	V		
8	ULM Alumni Association Audit	PERM	0	PERM	M	R	N	V		
9	ULM Athletic Foundation By-Laws	PERM	0	PERM	M	R	N	V		
10	ULM Athletic Foundation Bank Statements	ACT + 7 FY	0	ACT + 7 FY	M	S	N	I	ACT = until the 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 (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 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 ULM – University of Louisiana Monroe				

Heather R. Pilcher
Agency Approval

1/10/2024
Date Signed


Secretary of State, State Archives & Records Services

JAN 22 2024
Date Approved

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066.000	University of Louisiana Monroe / Office of the President / Executive Director ULM Foundation & Alumni Relations								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
11	ULM Foundation Files	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until the end of FY in which created or received.
12	Trust Records	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until the end of FY in which created or received.
13	ULM Foundation Invoices	ACT + 5 FY	0	ACT + 5 FY	M	S	N	V	ACT = until the end of FY in which audited.
14	Alumni Association Invoices	ACT + 5 FY	0	ACT + 5 FY	M	S	N	V	ACT = until the end of FY in which audited.
15	ULM Foundation Bank Reconciliations	ACT + 5 FY	0	ACT + 5 FY	M	S	N	V	ACT = until the end of FY in which audited.
16	Alumni Association Bank Reconciliations	ACT + 5 FY	0	ACT + 5 FY	M	S	N	V	ACT = until the end of FY in which audited.
17	ULM Foundation Accounts Payable	ACT + 5 FY	0	ACT + 5 FY	M	S	N	V	ACT = until the end of FY in which audited.
18	Alumni Association Accounts Payable	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until the end of FY in which audited.
19	Scholarships Memoranda	ACT + 2 FY	0	ACT + 2 FY	M	S	N	U	ACT = until the end of FY in which created or received.
20	ULM Foundation Trust Reconciliation	ACT + 5 FY	0	ACT + 5 FY	M	S	N	V	ACT = until the end of FY in which audited.
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 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 ULM – University of Louisiana Monroe			

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Cathy Moran
Secretary of State, State Archives & Records Services

JAN 22 2024
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Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
21	ULM Foundation Cancelled Checks	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until the end of FY in which created or received.
22	Alumni Association Cancelled Checks	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until the end of FY in which created or received.
23	ULM Foundation Vehicle Records	PERM	0	PERM	M	R	N	V	
24	Property Files	PERM	0	PERM	M	R	N	V	Deeds, property settlements, purchase agreements, and any other pertinent information.
25	Lease Information	ACT + 10 FY	0	ACT + 10 FY	M	S	N	U	ACT = until the end of FY in which created or received.
26	Insurance Files	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until the end of FY in which created or received.
27	ULM Foundation Audit Reports	PERM	0	PERM	M	R	N	V	
28	Endowed Scholarships	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until the end of FY in which created or received.
29	Newsletters	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until the end of FY in which created or received.
30	Professorship and Chair Information	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until the end of FY in which created or received.
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Heather R. Pilcher

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Date Signed

Amy Merian

Secretary of State, State Archives & Records Services

JAN 22 2024

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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Office of the President / Executive Director ULM Foundation & Alumni Relations								
31	ULM Foundation Committee and Board Info.	PERM	0	PERM	M	R	N	V	
32	ULM Foundation Audit Work Papers	ACT + 4 FY	0	ACT + 4 FY	M	S	N	V	ACT = until the end of FY in which created or received.
33	Supervisor Reports	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end CY in which supervision ends/ employee separates.
34	Policies and Procedures	PERM	0	PERM	M	R	N	V	
35	Requisitions/Purchase Orders	ACT + 4 FY	0	ACT + 4 FY	M	S	N	I	ACT = until the end of FY in which created or received.
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Heather R. Pilcher
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1/10/2024
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Amy Moran
Secretary of State, State Archives & Records Services

JAN 22 2024
Date Approved

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Remarks

Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Indicate Use of Form	
066.000	University of Louisiana Monroe / Provost & Vice President for Academic Affairs								__ ORIGINAL SUBMISSION <u>X</u> RENEWAL __ REPLACEMENT PAGE __ ADDENDUM PAGE	
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks	
		In Office	In Storage	Total Retention						
1	SACSCOC (Correspondence & supporting information concerning ULM accreditation)	ACT + 30 CY	0	ACT + 30 CY	M	S	N	V	ACT = until the end of the CY in which the record was created or received.	
2	Faculty Appeals/ Complaints	PERM	0	PERM	C	R	N	V		
3	Student Appeals/ Complaints	ACT + 10 CY	0	ACT + 10 CY	C	S	N	I	ACT = until the end of the CY in which the complaint and/or appeal has concluded.	
4	Evaluations of Deans/ Directors	ACT + 2 CY	0	ACT + 2 CY	C	S	N	U	ACT = until end of CY in which evaluation is issued.	
Permitted Retention Period Abbreviations		Security Status Codes			State Records Center Use			Agency Abbreviations		
ACT – Active Period (when used define term in remarks column)		P – Public Record			Y – Yes			SACSCOC – Southern Association of Colleges and Schools Commission on Colleges		
FY- Fiscal Year (July 1- June 30)		M – May Contain Confidential Information			N - No			ULM – University of Louisiana Monroe		
CY – Calendar Year (Jan 1 – Dec 31)		C – Confidential Information								
AY – Academic Year (Aug 1 – July 31)		Archival Processing Codes			Vital Record Identification Code					
FFY – Federal Fiscal Year (Oct 1 – Sept 30)		A – Transfer to State Archives			V= Vital					
MO – Months WK – Week (Mon-Sun) DY - Day(s)		R – Retain in Agency Archives			I = Important					
PERM – Permanent (Life of State) LOA – Life of Agency		S – Review by State Archives			U= Useful					
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).		O – Other (Specify in Remarks)								

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1/10/2024

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JAN 22 2024

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066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Arts, Education, and Sciences / Office of the Dean								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Supervisor Files	ACT+ 10 AY	0	ACT + 10 AY	M	S	N	I	ACT = until end of AY in which person is employed.
2	Student Files	ACT+ 10 AY	0	ACT + 10 AY	C	S	N	M	ACT = until end of AY in which student no longer enrolled.
3	Grant Records	ACT + 6 AY	0	ACT + 6 AY	M	S	N	V	ACT = until end of AY in which grant closes.
4	College Inventory	ACT + 3 CY	0	ACT + 3 CY	P	S	N	I	ACT = until end of CY in which record created or received.
5	Museum Inventory/ Value/Loan	PERM	0	PERM	P	R	N	V	
6	Child Development Center Semester Files	ACT + 4 FY	0	ACT + 4 FY	C	S	N	I	ACT = until end of FY in which record created or received.
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Agency Approval

02/2/2024
Date Signed

Amy Mora
Secretary of State, State Archives & Records Services

2-9-2024
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 / Provost & VP for Academic Affairs / College of Business and Social Sciences/ Office of the Dean								
1	Undergraduate Students	ACT + 10 AY	0	ACT + 10 AY	C	S	N	V	ACT = until end of AY in which created or received.
2	Graduate Files	PERM	0	PERM	C	R	N	V	
3	Undergraduate Students/ Graduate Senior List	ACT + 10 AY	0	ACT + 10 AY	P	S	N	I	ACT = until end of AY in which created or received.
4	Administrative/ Faculty Records – Supervisor Files	PERM	0	PERM	M	R	N	V	Folder maintained on faculty (Active & Inactive) from time of employment.
5	Administrative/ Faculty Records – Faculty Summer Staffing	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until end of FY in which no longer with agency.
6	Academics/ Administrative – Commencement Faculty List	ACT + 2 FY	0	ACT + 2 FY	P	S	N	U	ACT = until end of FY in which created or received.
7	Academic/ Administrative – Enrollment Report	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end of FY in which created or received.
8	Academic/ Administrative – Inventory	ACT + 5 FY	0	ACT + 5 FY	P	S	N	I	ACT = until end of FY in which created or received.
9	Academic/ Administrative – Minutes	PERM	0	PERM	P	R	N	V	
10	Academic/ Administrative – Accreditation Reports	ACT + 5 FY	0	ACT + 5 FY	P	S	N	I	ACT = until end of FY in which created or received. Accreditation reports updated every 5 years.
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Item Number	Records Series Title	Retention Period							Remarks	
		In Office	In Storage	Total Retention						
11	Financial Records/ CBSS Foundation Requests	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
12	Financial Records/ ULM Check Requests	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
13	MBA Students	ACT + 2 AY	0	ACT + 2 AY	C	S	N	I	ACT = until end of AY in which created or received.	
14	MBA – ULM/ Hong Kong Students	ACT + 2 AY	0	ACT + 2 AY	C	S	N	I	ACT = until end of AY in which created or received.	
15	MBA Students – Graduate Student Folders/ Graduates	PERM	0	PERM	C	R	N	V		
16	MBA Students/ List of MBA Graduates	ACT + 2 FY	0	ACT + 2 FY	M	S	N	I	ACT = until end of FY in which created or received.	
17	Financial Records/ Travel Expenses	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which created or received.	
18	Syllabi	ACT + 5 AY	0	ACT + 5 AY	P	S	N	I	ACT = until end of AY in which created or received.	

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Item Number	Records Series Title	Retention Period							Remarks	
		In Office	In Storage	Total Retention						
1	Faculty Files	ACT + 5 AY	0	ACT + 5 AY	C	S	N	V	ACT = until end of AY in which no longer employed.	
2	Facility Inspections & Accident Reports	PERM	0	PERM	C	R	N	V		
3	Property Control & Inventory	PERM	0	PERM	P	R	N	V		
4	Budget & Financial Documents	ACT + 2 FY	0	ACT + 2 FY	C	S	N	V	ACT = until end of AY in which created or received.	
5	Student Appeals	ACT + 2 FY	0	ACT + 2 FY	C	S	N	I	ACT = until end of AY in which created or received.	
6	Part-time Overload (PTOL)	ACT + 2 FY	0	ACT + 2 FY	M	S	N	V	ACT = until end of AY in which created or received.	
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