

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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Indicate Use of Form

☐ ORIGINAL SUBMISSION
☒ RENEWAL
☐ REPLACEMENT PAGE
☐ ADDENDUM PAGE

Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Remarks
066.000	University of Louisiana Monroe / Provost & Vice President for Academic Affairs / College of Health Sciences / Kitty Degree School of Nursing								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Graduate Files – Student Academic Folders	PERM	0	PERM	C	S	N	V	
2	Prospective Students	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
3	Pre-nursing and Nursing Academic Folders	PERM	0	PERM	C	S	N	V	
4	Student Files	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which student no longer enrolled.
5	Student Clinical Folders	ACT + 1 CY	0	ACT + 1 CY	C	S	N	V	ACT = until end of CY in which program is complete.
6	Assessment/ Evaluation Diagnostic Reports	ACT + 1 CY	0	ACT + 1 CY	C	S	N	I	ACT = until end of CY in which created or received.
7	Test Scantrons	ACT + 1 AY	0	ACT + 1 AY	C	S	N	U	ACT = until end of AY in which created or received. Scantrons = machine readable answer sheets.
8	Keyed Test Booklets & Test Analysis	ACT + 5 AY	0	ACT + 5 AY	C	S	N	V	ACT = until end of AY in which created or received.
9	Grade Book or Grade Sheet for Each Course	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	ACT = until end of FY in which created or received.
10	Clinical Contracts	ACT + 5 CY	0	ACT + 5 CY	C	S	N	V	ACT = until end of CY in which contract lapses.
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			

Heather R. Pilcher
Agency Approval

1/10/2024
Date Signed

Amy Mora
Secretary of State, State Archives & Records Services

JAN 22 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 Health Sciences / Kitty Degree School of Nursing									
11	Louisiana State Board of Nursing Clinical Faculty Survey Forms	ACT + 1 CY	0	ACT + 1 CY	C	S	N	V	ACT = until end of CY in which created or received.	
12	Current Louisiana State Board of Nursing Preceptor Qualification Forms	ACT +3 FY	0	ACT +3 FY	C	S	N	V	ACT = until end of FY in which created or received.	
13	Clinical Agency Letter of Agreement	ACT +3 FY	0	ACT +3 FY	C	S	N	V	ACT = until end of FY in which agreement ends.	
14	Infant Assessment Permission Forms	ACT +5 FY	0	ACT +5 FY	C	S	N	V	ACT = until end of FY in which patient reaches age of majority.	
15	Clinical Site Request Approval Forms	ACT +3 FY	0	ACT +3 FY	C	S	N	V	ACT = until end of FY in which created or received.	
16	Department Heads Annual Report for Evaluation Committee	ACT +10 FY	0	ACT +10 FY	C	S	N	I	ACT = until end of FY in which created or received.	
17	Course Syllabi	ACT +10 FY	0	ACT +10 FY	C	S	N	V	ACT = until end of FY in which created or received.	
18	School of Nursing Self-Study Report	ACT +10 FY	0	ACT +10 FY	C	S	N	V	ACT = until end of FY in which created or received.	
19	School of Nursing Annual Report to the University	PERM	0	PERM	C	R	N	V		
20	Louisiana State Board of Nursing Annual Report	ACT +10 FY	0	ACT +10 FY	C	S	N	V	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 (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				

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Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Indicate Use of Form <input type="checkbox"/> ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input type="checkbox"/> ADDENDUM PAGE
066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health Sciences / Kitty Degree School of Nursing								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
21	Faculty Folders	ACT + 30 FY	0	ACT + 30 FY	M	S	N	V	ACT = until end of FY in which no longer employed.
22	Louisiana State Board of Nursing Letters on Students in Clinical	ACT + 5 FY	0	ACT + 5 FY	C	S	N	V	ACT = until end of FY in which created or received.
23	Prospective Faculty Folders	ACT + 10 FY	0	ACT + 10 FY	C	S	N	I	ACT = until end of FY in which created or received.
24	Minutes for School of Nursing	ACT + 10 FY	0	ACT + 10 FY	C	S	N	V	ACT = until end of FY in which created or received.
25	Budget Information	PERM	0	PERM	M	R	N	V	
26	Purchase Orders/ Invoices	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.
27	Continuing Education Files	PERM	0	PERM	C	R	N	V	
28	Personal School of Nursing Files	PERM	0	PERM	C	R	N	V	
29	Certified Nurses Aid Files	PERM	0	PERM	C	R	N	V	
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			

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Agency No 066.000		Agency / Division / Section University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health Sciences / School of Allied Health / Kinesiology			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				
1		Course Syllabi			ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.
2		Course Grades			ACT + 6 FY	0	ACT + 6 FY	C	S	N	I	ACT = until end of FY in which created or received.
3		Human Performance Lab Requisitions			ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.
4		Printing Requisitions			ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.
5		Faculty Folders			ACT + 6 FY	0	ACT + 6 FY	C	S	N	I	ACT = until end of FY in which no longer employed.
6		Faculty Timesheets			ACT + 6 FY	0	ACT + 6 FY	M	S	N	I	ACT = until end of FY in which created or received.
7		Student Worker Folders			ACT + 6 CY	0	ACT + 6 CY	M	S	N	I	ACT = until end of CY in which student is no longer enrolled.
8		Graduate Assistantship Folders			ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which student is no longer enrolled.
9		Civil Service Folder			ACT + 6 FY	0	ACT + 6 FY	M	S	N	I	ACT = until end of FY in which no longer employed.
10		Budget Transfer			ACT + 6 FY	0	ACT + 6 FY	P	S	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 (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		

Heather R. Pilcher
Agency Approval

1/10/2024
Date Signed

Cathy Mora
Secretary of State, State Archives & Records Services

JAN 22 2024
Date Approved

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Agency No 066.000	Agency / Division / Section University of Louisiana Monroe / Provost & VP for Academic Affairs / College of Health Sciences / School of Allied Health / Kinesiology				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	Copy Machine	ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.	
12	Travel Reports	ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.	
13	Interdepartmental	ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.	
14	Purchase Orders	ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.	
15	Graduate Files	ACT + 10 FY	0	ACT + 10 FY	C	S	N	V	ACT = until end of FY in which no longer enrolled.	
16	Undergraduate Files	ACT + 10 FY	0	ACT + 10 FY	C	S	N	V	ACT = until end of FY in which no longer enrolled.	
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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 / Provost & VP for Academic Affairs / College of Health Sciences/ School of Allied Health / Health Studies								<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	Student Academic Folders	PERM	0	PERM	C	S	N	V		
2	Tests/ Test Analyses	ACT + 2 AY	0	ACT + 2 AY	M	S	N	U	ACT = until end of AY in which created or received.	
3	Grade Book	ACT + 5 AY	0	ACT + 5 AY	C	S	N	U	ACT = until end of AY in which created or received.	
4	Practicum Contracts	ACT + 10 AY	0	ACT + 10 AY	C	S	N	U	ACT = until end of AY in which contract lapses.	
5	Faculty Files	ACT	PERM	PERM	C	R	N	V	ACT = until end of AY in which created or received.	
6	Annual Report	ACT + 1 FY	PERM	PERM	P	R	N	V	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 (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				

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Amy McLean
Secretary of State, State Archives & Records Services

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Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
1	Student Academic Files	PERM	0	PERM	C	S	N	V	
2	Graduate Academic Files	PERM	0	PERM	C	R	N	V	
3	Student Files	ACT + 3 AY	0	ACT + 3 AY	C	S	N	U	ACT = until end of AY in which student no longer enrolled.
4	Patient Clinical Files (Adults)	ACT + 5 AY	5 AY	ACT + 10 AY	C	S	N	V	ACT = until end of AY in which created or received.
5	Patient Clinical Files (Children)	ACT + 5 AY	5 AY	ACT + 10 AY	C	S	N	I	ACT = until end of AY in which patient reaches age of majority.
6	Student Clinical Files	ACT + 3 AY	0	ACT + 3 AY	C	S	N	U	ACT = until end of AY in which student no longer enrolled.
7	Exams/ Scantrons/ Analyses	ACT + 1 AY	0	ACT + 1 AY	C	S	N	U	ACT = until end of AY in which created or received. Scantrons = machine readable answer sheets.
8	Course Grade Books/ Electronic Grades	ACT + 5 AY	0	ACT + 5 AY	C	S	N	I	ACT = until end of AY in which created or received.
9	Correspondence	ACT + 3 AY	0	ACT + 3 AY	C	S	N	I	ACT = until end of AY in which created or received.

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Amy Mera

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/ Provost & VP for Academic Affairs/ College of Health Sciences/ School of Allied Health/ Medical Laboratory Science								
1	Graduate Files – Student Academic Folders	PERM	0	PERM	C	R	N	V	ACT = until end of AY in which created or received.
2	Graduate Files – Student Clinical Folders	PERM	0	PERM	C	R	N	V	ACT = until end of AY in which created or received.
3	Prospective Student Folders	ACT + 5 AY	0	ACT + 5 AY	C	S	N	U	ACT = until end of AY in which created or received.
4	Student Folders	ACT + 5 AY	0	ACT + 5 AY	C	S	N	U	ACT = until end of AY in which student no longer enrolled.
5	Exam/ Scantrons/ Analyses	ACT + 1 AY	0	ACT + 1 AY	C	S	N	U	ACT = until end of AY in which created or received. Scantrons = machine readable answer sheets.
6	Course Grade Book/ Grade Sheets (Electric & Print)	ACT + 5 AY	0	ACT + 5 AY	C	S	N	U	ACT = until end of AY in which created or received.

Permitted Retention Period Abbreviations
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Security Status Codes
P – Public Record
M – May Contain Confidential Information
C – Confidential Information
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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
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Vital Record Identification Code
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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs/ College of Health Sciences / School of Allied Health / Occupational Therapy								
1	Graduate Files – Student Academic Folders	PERM	0	PERM	C	S	N	V	
2	Tests/ Scantrons/ Test Analyses	ACT + 1 AY	0	ACT + 1 AY	C	S	N	U	ACT = until end of FY in which created or received. Scantrons = machine readable answer sheets.
3	Grade Book or Grade Sheets for Each Course	ACT + 5 AY	0	ACT + 5 AY	C	S	N	U	ACT = until end of FY in which created or received.
4	Clinical Education Contracts	ACT + 10 CY	0	ACT + 10 CY	M	S	N	I	ACT = until end of CY in which contract lapses.
5	Budget Information	PERM	PERM	PERM	P	R	N	V	
6	Annual Report to the University	PERM	PERM	PERM	P	R	N	V	
7	ACOTE Accreditation Manual/ Report Document	PERM	0	PERM	P	R	N	V	
8	Supervisor Files	ACT + 5 CY	0	ACT + 5 CY	M	S	N	V	
9	Pediatric Clinic Files	ACT + 26 CY	0	ACT + 26 CY	C	S	N	I	ACT = until end of CY in which created or received.
10	Adult Clinic Files	ACT + 10 CY	0	ACT + 10 CY	C	S	N	I	ACT = until end of CY in which created or received.

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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

ACOTE – The Accreditation Council of Occupational Therapy Education

Heather R. Pilcher

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Amy Moran

Secretary of State, State Archives & Records Services

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Item Number	Records Series Title	Retention Period								
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1	Graduate Files – Student Academic Folders	PERM	0	PERM	C	S	N	V		
2	Grade Book or Grade Sheets for Each Course	ACT + 5 AY	0	ACT + 5 AY	C	S	N	U	ACT = until end of FY in which created or received.	
3	Clinical Education Contracts	ACT + 10 CY	0	ACT + 10 CY	M	S	N	I	ACT = until end of CY in which contract lapses.	
4	Annual Report to the University	PERM	PERM	PERM	P	R	N	V		
5	CAPTE Accreditation Manual/ Report Document	PERM	0	PERM	P	R	N	V	ACOTE Accreditation Manual/ Report Document	
6	Tests / Test Analyses	ACT + 1 AY	0	ACT + 1 AY	C	S	N	U	ACT = until end of FY in which created or received. Scantrons = machine readable answer sheets.	
7	Pediatric Clinic Files	ACT + 26 CY	0	ACT + 26 CY	C	S	N	I	ACT = until end of CY in which created or received.	
8	Adult Clinic Files	ACT + 10 CY	0	ACT + 10 CY	C	S	N	I	ACT = until end of CY 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 ACOTE – The Accreditation Council of Occupational Therapy Education CAPTE – The Commission on Accreditation in Physical Therapy Education	

Heather R. Pilcher

Agency Approval

1/10/2024

Date Signed

Amy Moran

Secretary of State, State Archives & Records Services

JAN 22 2024

Date Approved