

Records Retention Schedule

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

recmgt@sos.la.gov

SSARC-932 (09/20)

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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	Graduate Files – Student Academic Folders	PERM	0	PERM	C	S	N	V	
2	Graduate Files – Student Clinical Folders	ACT + 1 AY	PERM	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	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.
6	Course Grade Book/ Grade Sheets (Electronic & 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 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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Heather R. Pilcher
Agency Approval

1/10/2024
Date Signed

Amy Huan
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 / Provost & VP for Academic Affairs/ College of Health Sciences / School of Allied Health / Speech-Language Pathology								<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	Graduate Student Records	PERM	0	PERM	C	S	N	V		
2	Clinical Intern Contracts	ACT + 10 CY	0	ACT + 10 CY	C	S	N	V	ACT = until end of CY in which contract lapses.	
3	Supervisor Files	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end of CY in which employee separates from agency.	
4	Office Forms (Policies & Procedures, SPLP Handbooks, Accreditation Reports, Curriculum Paperwork, and Faculty Evaluations)	PERM	0	PERM	P	R	N	V		
5	Financial Files	ACT + 3 CY	0	ACT + 3 CY	P	S	N	V	ACT = until end of CY in which audited.	
6	Bachelor of Science Degree (Clinical & Academic Records)	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until end of FY in which program completed.	
7	Master of Science Degree (Clinical & Academic Records)	ACT + 5 FY	0	ACT + 5 FY	M	S	N	I	ACT = until end of FY in which program completed.	
8	Client Files - Juvenile	ACT + 10 CY	0	ACT + 10 CY	C	S	N	I	ACT = until end of CY in which patient reaches age of majority.	
9	Client Files – Adult	ACT + 10 CY	0	ACT + 10 CY	C	S	N	I	ACT = until end of CY in which no longer being treated.	
10	Clinical Financial Records	ACT + 3 FY	0	ACT + 3 FY	P	S	N	V	ACT = until end of FY in which audited.	
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Heather R. Pilcher

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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	Remarks
066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs/ College of Health Sciences / School of Allied Health / Speech-Language Pathology								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
11	Clinical Files Information	ACT + 3 FY	0	ACT + 3 FY	C	S	N	I	ACT = until end of CY in which created or received.
12	Hearing Screenings	ACT + 10 CY	0	ACT + 10 CY	C	S	N	I	ACT = until end of CY in which created or received.
13	Risk Management Information	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.
14	Clinic Forms	PERM	0	PERM	P	R	N	V	
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Date Signed

Amy 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 Pharmacy				Security	Archival	State Records Center	Vital	Indicate Use of Form	
Item Number	Records Series Title	Retention Period							<input type="checkbox"/> ORIGINAL SUBMISSION <input type="checkbox"/> RENEWAL <input type="checkbox"/> REPLACEMENT PAGE <input type="checkbox"/> ADDENDUM PAGE	
		In Office	In Storage	Total Retention					Remarks	
1	Supervisor Files	ACT + 2 CY	0	ACT + 2 CY	M	S	N	I	ACT = until end of CY in which employee is no longer with agency.	
2	Student Records	PERM	0	PERM	C	S	N	V		
3	Graduated Students	PERM	0	PERM	C	S	N	V		
4	Business Office Records	PERM	0	PERM	M	R	N	V		
5	Purchasing	PERM	0	PERM	M	R	N	V		
6	Equipment Files	ACT + 2 FY	0	ACT + 2 FY	M	S	N	V	ACT = until end of FY in which created or received.	
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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 / Provost & VP for Academic Affairs / Graduate School								
1	Student Records	PERM	0	PERM	C	S	N	V	
2	Graduate Council Minutes	ACT + 10 AY	0	ACT + 10 AY	M	S	N	V	ACT = until end of AY year record created or received.
3	Graduate Catalog	PERM	0	PERM	P	R	N	V	
4	Application Materials for Incomplete Applicants	ACT + 1 AY	0	ACT + 1 AY	C	S	N	V	ACT = until end of AY year record created or received
5	Application Materials for Denied Applicants	ACT + 1 AY	0	ACT + 1 AY	C	S	N	V	ACT = until end of AY year record created or received
6	Application Materials for Admitted Applicants who do not enroll	ACT + 1 AY	0	ACT + 1 AY	C	S	N	V	ACT = until end of AY year record created or received
7	Education Graduates: Degree Plan and Grade Sheet	PERM	0	PERM	M	R	N	V	
8	Graduate Assistant Records	ACT + 10 AY	0	ACT + 10 AY	M	S	N	I	ACT = until end of AY in which employed
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		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 / Institutional Effectiveness									
1	Assessment Documentation	ACT + 3 AY	0	ACT + 3 AY	M	S	N	I	ACT = until end of AY in which created or received.	
2	Inventory	ACT + 2 FY	0	ACT + 2 FY	P	S	N	I	ACT = until end of FY in which created or received.	
3	Supervisor Files	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end of FY in which employee is no longer with agency.	
4	Purchase Order	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.	
5	IPEDS Reports	ACT + 10 AY	0	ACT + 10 AY	P	S	N	I	ACT = until end of AY in which created or received.	
6	Correspondence – General	ACT + 3 CY	0	ACT + 3 CY	P	S	N	U	ACT = until end of CY in which created or received.	
7	Board Material	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end of FY in which created or received.	
8	Peterson's Surveys	ACT + 3 AY	0	ACT + 3 AY	M	S	N	U	ACT = until end of AY in which created or received.	
9	Questionnaire	ACT + 3 CY	0	ACT + 3 CY	M	S	N	U	ACT = until end of CY in which created or received.	
10	BoR ACT Student Opinion Survey	ACT + 5 CY	0	ACT + 5 CY	C	S	N	I	ACT = until end of CY in which created or received.	
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066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs / Institutional Effectiveness									<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							
11	Student Workers	ACT + 5 AY	0	ACT + 5 AY	M	S	N	I		ACT = until end of AY in which created or received.	
12	U.S. News Surveys	ACT + 3 AY	0	ACT + 3 AY	M	S	N	U		ACT = until end of AY in which created or received.	
13	Office Inventory	ACT + 3 CY	0	ACT + 3 CY	P	S	N	I		ACT = until end of CY in which created or received.	
14	Purchases	ACT + 5 CY	0	ACT + 5 CY	P	S	N	I		ACT = until end of CY in which created or received.	
15	Statewide Student Profile System	ACT + 5 AY	0	ACT + 5 AY	C	S	N	I		ACT = until end of AY in which created or received.	
16	LaPas	ACT + 10 AY	0	ACT + 10 AY	P	S	N	I		ACT = until end of AY in which created or received.	
17	Administrative Comp. Survey, CUPA	ACT + 10 AY	0	ACT + 10 AY	C	S	N	U		ACT = until end of AY in which created or received.	
18	NLU/ULM Fact Book	PERM	0	PERM	P	R	N	V			
19	SREB State Data Exchange	ACT + 10 AY	0	ACT + 10 AY	M	S	N	U		ACT = until end of AY in which created or received.	
20	Board of Regents	ACT + 5 AY	0	ACT + 5 AY	M	S	N	I		ACT = until end of AY 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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066.000	University of Louisiana Monroe / Provost & VP for Academic Affairs / Institutional Effectiveness								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
21	Board of Supervisors	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end of CY in which created or received.
22	Facilities Inventory and Utilization	ACT + 3 CY	0	ACT + 3 CY	P	S	N	I	ACT = until end of CY in which created or received.
23	University Building and Classroom	ACT + 3 CY	0	ACT + 3 CY	P	S	N	U	ACT = until end of CY in which created or received.
24	NSSE Survey	ACT + 5 AY	0	ACT + 5 AY	M	S	N	U	ACT = until end of AY in which created or received.
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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 / Library								
1	Correspondence – General	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
2	Gift Donors	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
3	Inventory	ACT + 2 FY	0	ACT + 2 FY	P	S	N	I	ACT = until end of FY in which created or received.
4	Forms, Policies and Procedures	PERM	0	PERM	P	R	N	V	
5	Supervisor Files	ACT + 5 CY	0	ACT + 5 CY	M	S	N	I	ACT = until end of CY in which employee separates from agency.
6	Purchase Orders	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.
7	Requisitions/Fiscal Year	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.
8	Annual Reports	ACT + 1 FY	PERM	PERM	P	R	N	V	ACT = until end of FY in which created or received.
9	Information Services Council	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end of FY 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
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
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Agency Abbreviations

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