

# 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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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						
<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Executive Director for Auxiliary Enterprises &amp; Student Services / WIDS (Warhawk ID Services)</b>									
1	Satellite Copier Center Accounts	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.	
2	Equipment Working Files	PERM	0	PERM	P	R	N	V		
3	Miscellaneous Working Files	ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.	
4	Ledger Cards	ACT + 6 FY	0	ACT + 6 FY	P	S	N	I	ACT = until end of FY in which created or received.	
5	ID Replacement Receipts	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.	
6	Activity Center ID's	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.	
7	Warhawk Express Working Files	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.	
8	Meal Plan Audits	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.	
9	Meal Plan Cards	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.	

  

<b>Permitted Retention Period Abbreviations</b> 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).	<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information  <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)	<b>State Records Center Use</b> Y – Yes N – No  <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful	<b>Agency Abbreviations</b> ID – Identification
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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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Agency No <b>066.000</b>	Agency / Division / Section <b>University of Louisiana Monroe / VP for Business Affairs / Assistant VP Budget &amp; Administration / Athletics Business Operations</b>				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	
Item Number	Records Series Title	Retention Period							Remarks	
		In Office	In Storage	Total Retention						
1	Home Football Game Ticket Reconciliations	ACT + 6 FY	0	ACT + 6 FY	M	S	N	I	ACT = until end of FY in which created or received.	
2	All Sports Game Contracts/ Agreements	ACT + 10 FY	0	ACT + 10 FY	M	S	N	V	ACT = until end of FY in which contract lapses.	
3	Football Team Travel Expense Reports	ACT + 6 FY	0	ACT + 6 FY	M	S	N	U	ACT = until end of FY in which created or received.	
4	Football Home Game Officials Expense Vouchers	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which created or received.	
5	Baseball Home Game Umpire Payment Vouchers	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which created or received.	
6	Athletic Department Surveys	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
7	Professional Service Contracts/ Agreements	ACT + 10 FY	0	ACT + 10 FY	P	S	N	I	ACT = until end of FY in which contract lapses.	
8	Athletic Game Guarantees-Revenues	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which created or received.	
9	Athletic Game Guarantees Paid Out-Expenses	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which created or received.	
10	Administration & Faculty Petty Case Expense Sheet	ACT + 3 FY	0	ACT + 3 FY	M	S	N	I	ACT = until end of FY in which created or received.	
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information  <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			<b>State Records Center Use</b> Y – Yes N - No  <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b>			

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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☐ 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 / VP for Business Affairs / Assistant VP Budget & Administration / Athletics Business Operations								
11	Travel Expense Reports – Athletic Director	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
12	Travel Expense Reports (ULMAF) – Athletic Director	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
13	Travel Expense Reports – Men's Track	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
14	Travel Expense Reports (ULMAF) – Men's Track	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
15	Grants-in-Aid – Men's Track	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which grant is closed.
16	National Letter of Intent – Men's Track	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.
17	Medical Records – Athletic Trainer	ACT + 7 FY	0	ACT + 7 FY	C	S	N	V	ACT = until end of FY in which created or received.
18	Travel Expense Reports – Baseball	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
19	Travel Expense Reports (ULMAF) - Baseball	ACT + 6 FY	0	ACT + 6 FY	M	S	N	U	ACT = until end of FY in which created or received.
20	National Letter of Intent - Baseball	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.
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*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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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	
21	Grants-in-Aid – Baseball	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which grant is closed.	
22	Travel Expenses – Women's Track	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
23	Travel Expenses (ULMAF) – Women's Track	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
24	Grants-in-Aid – Women's Track	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which grant is closed.	
25	National Letter of Intent – Women's Track	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.	
26	Travel Expenses – Men's Golf	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
27	Travel Expenses (ULMAF) – Men's Golf	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.	
28	National Letter of Intent – Men's Golf	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.	
29	Grants-in-Aid – Men's Golf	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which grant is closed.	
30	Accounts Payable – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.	
<b>Permitted Retention Period Abbreviations</b> 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).					<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information  <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)		<b>State Records Center Use</b> Y – Yes N – No  <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b> ULMAF – University of Louisiana Monroe Athletic Foundation WBKB – Women's Basketball SOC – Soccer SB – Softball TN – Tennis VB – Volleyball MBKB – Men's Basketball	

Heather R. Pilcher  
Agency Approval

1/10/2024  
Date Signed

Amy M. [Signature]  
Secretary of State, State Archives & Records Services

JAN 22 2024  
Date Approved

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<b>066.000</b>	<b>University of Louisiana Monroe / VP for Business Affairs / Assistant VP Budget &amp; Administration / Athletics Business Operations</b>								
31	Accounts Payable (ULMAF) – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.
32	Contracts & Confirmation Letters – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 10 FY	0	ACT + 10 FY	M	S	N	I	ACT = until end of FY in which contract lapses.
33	Inventory/ Property Control – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	P	S	N	I	ACT = until end of FY in which created or received.
34	NCAA Special Assistance Programs – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.
35	Petty Cash Expenses – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.
36	Post Office Information – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.
37	Graphic Services Requisitions – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.
38	Travel Advance & Expense Reports – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.
39	Vehicle Requests – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end of FY in which created or received.
40	Grants-in-Aid – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which grant is closed.
<b>Permitted Retention Period Abbreviations</b> 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).		<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)		<b>State Records Center Use</b> Y – Yes N - No <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful		<b>Agency Abbreviations</b> ULMAF – University of Louisiana Monroe Athletic Foundation WBKB – Women’s Basketball SOC – Soccer SB – Softball TN – Tennis VB – Volleyball MBKB – Men’s Basketball			

*Heather R. Pilcher*

Agency Approval

1/10/2024

Date Signed

*Amy Mora*

Secretary of State, State Archives & Records Services

JAN 22 2024

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066.000		University of Louisiana Monroe / VP for Business Affairs / Assistant VP Budget & Administration / Athletics Business Operations							<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						
41	National Letter of Intent – WBKB, SOC, SB, TN, VB, & MBKB	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.	
42	Spreadsheet for Scholarships	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.	
43	Grants-in-Aid – Football	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which grant is closed.	
44	National Letter of Intent – Football	ACT + 6 FY	0	ACT + 6 FY	M	S	N	V	ACT = until end of FY in which created or received.	
45	ULMAF Accounts Payable (other)	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.	
46	Football Recruiting and Travel Expenses	ACT + 3 FY	0	ACT + 3 FY	M	S	N	V	ACT = until end of FY in which audited.	

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Secretary of State, State Archives & Records Services

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### Remarks

**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)

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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).

**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

### Agency Abbreviations

*Ameykera*  
Secretary of State, State Archives & Records

JAN 22 2024

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Agency No <b>066.000</b>	Agency / Division / Section <b>University of Louisiana Monroe / VP for Business Affairs / Controller / Accounts Payable</b>				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	Purchase Orders	ACT + 2 FY	3 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.	
2	Travel Reimbursement Files	ACT + 2 FY	3 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.	
3	1099's & Worksheets	ACT + 2 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.	
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		In Office	In Storage	Total Retention					Remarks	
1	Bank Reconciliations	ACT + 2 FY	3 FY	ACT + 5 FY	M	S	N	V	ACT = until end of FY in which audited.	
2	Unclaimed Property Report	ACT + 2 FY	3 FY	ACT + 5 FY	M	S	N	V	ACT = until end of FY in which audited.	
3	Investment and Banking Documents	ACT + 5 FY	10 FY	ACT = 15 FY	C	S	N	U	ACT = until end of FY in which created or received.	
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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	Bankruptcy Filing	ACT + 1 FY	3 FY	ACT + 4 FY	C	S	N	U	ACT = until end of FY in which created or received.
2	Bankruptcy Discharge	ACT + 1 FY	3 FY	ACT + 4 FY	C	S	N	U	ACT = until end of FY in which created or received.
3	Statement of Account	ACT + 2 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
4	Collection Agency Status Reports	ACT + 2 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
5	Banner Check Register	ACT + 3 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
6	Affidavit of Lost, Destroyed, or Stolen Checks	ACT + 1 FY	2 FY	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
7	Numbered Adjustments Voucher	ACT + 3 FY	PERM	PERM	M	R	N	V	ACT = until end of FY in which created or received.
8	1098T	ACT + 1 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.
9	Fee Schedule & Calendars	ACT + 10 FY	PERM	PERM	P	R	N	V	ACT = until end of FY in which created or received.
10	Warhawk Express Cancellation Request	ACT + 7 FY	0	ACT + 7 FY	C	S	N	U	ACT = until end of FY in which created or received.

  

<b>Permitted Retention Period Abbreviations</b> 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).	<b>Security Status Codes</b> P – Public Record M – May Contain Confidential Information C – Confidential Information  <b>Archival Processing Codes</b> A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)	<b>State Records Center Use</b> Y – Yes N - No  <b>Vital Record Identification Code</b> V= Vital I = Important U= Useful	<b>Agency Abbreviations</b>
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Heather R. Pilcher  
Agency Approval

1/10/2024  
Date Signed

Amy H. H. H.  
Secretary of State, State Archives & Records Services

JAN 22 2024  
Date Approved