Louisiana State Archives—Records Management Louisiana Secretary of State

Page 61 of 98 Post Office Box 94125, Baton Rouge, LA 70804 recmgt@sos.la.gov Indicate Use of Form Agency No. Agency / Division / Section ORIGINAL SUBMISSION University of Louisiana Monroe / VP for Business Affairs / Controller / Student Accounts 066.000 X RENEWAL State Records Center \_\_REPLACEMENT PAGE ltem Retention Period Archival ADDENDUM PAGE Security **Records Series Title** Number **Total** ln Remarks Vital In Office Storage Retention 11 Manual Adjustment ACT + 2 FY PERM PERM R V M Ν ACT = until end of FY in which created or received. 12 Third Party Billing Reconciliations ACT + 1 FY 2 FY ACT + 3 FY М S N U ACT = until end of FY in which created or received. 13 **Banner Rate Tables** ACT + 5 FY 0 ACT + 5 FY М S U Ν ACT = until end of FY in which created or received. 14 Refund Check Registers ACT + 5 FY 0 ACT + 5 FY M S Ν U ACT = until end of FY in which created or received. 15 SIS Balance ACT + 5 FY 0 ACT + 5 FY С S Ν U ACT = until end of FY in which created or received. 16 1098T - Tax ACT + 5 FY Ω С S ACT + 5 FY Ν U ACT = until end of FY in which created or received. 17 **Outstanding Debt** ACT + 5 FY n ACT + 5 FY С S U Ν ACT = until end of FY in which created or received. 18 Check Register ACT + 5 FY 0 ACT + 5 FY М S Ν u ACT = until end of FY in which created or received. 19 Check Register Outstanding Debt ACT + 5 FY 0 ACT + 5 FY С S Ν U ACT = until end of FY in which created or received. 20 Hurricane Katrina - Special Circumstances ACT + 1 FY PERM PERM C R N V ACT = until end of FY in which created or received. **Permitted Retention Period Abbreviations Security Status Codes** State Records Center **Agency Abbreviations** Use ACT – Active Period (when used define term in remarks column) P - Public Record Y - Yes SIS - Student Information System FY- Fiscal Year (July 1- June 30) M - May Contain Confidential Information N - No 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 O - Other (Specify in Remarks) series that contains born-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).

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1/10/2024

Date Signed

Secretary of State, State Archives & Records Services

JAN 2 2 2024

SSARC-932 (09/20)

SSARC-932 (09/20)

gency No 066.000	Agency / Division / Section University of Louisiana Monroe / VP for Busines	ss Affairs / Controller / Student Accounts						***	ORIGINAL SUBMISSION X_RENEWAL	
Item Number	Records Series Title	Retention Period				al	State Records Center		REPLACEMENT PAGEADDENDUM PAGE	
		In Office	In Storage	Total Retentio	Securi	Security	State I Center	Vital	Remarks	
21	Quarterly Debt (AR) Reports	ACT + 1 FY	PERM	PERM	С	R	N	V	ACT = until end of FY in which created or received	
22	Appeals Payment Information Files	ACT + 1 FY	PERM	PERM	С	R	N	٧	ACT = until end of FY in which created or received	
23	Third Party Invoices and Waivers Files	ACT + 1 FY	PERM	PERM	С	R	N	V	ACT = until end of FY in which created or received.	
24	Third Party Billing Files	ACT + 1 FY	PERM	PERM	С	R	N	V	ACT = until end of FY in which created or received.	
ermitted Ret	ention Period Abbreviations	Security Status	Codes		State Re	cords	Center		Agency Abbreviations	
CT – Active F Y- Fiscal Yea	Period (when used define term in remarks column) r (July 1- June 30) · Year (Jan 1 – Dec 31)	P – Public Reco M – May Contain C – Confidential	Use Y – Yes N - No	00143	oemei		AR – Accounts Receivable			
AY – Academic Year (Aug 1 – July 31) FFY – Federal Fiscal Year (Oct 1 – Sept 30)		A – Transfer to State Archives				ord ation C	ode			
MO – Months WK – Week (Mon-Sun) DY - Day(s)  PERM – Permanent (Life of State)  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).		S – Review by State Archives			V= Vital I = Impo U= Usefu					

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Retention Period

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Storage

PERM

PERM

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M - May Contain Confidential Information

Louisiana State Archives—Records Management Louisiana Secretary of State

Financial Statements

Reconciliation Reports

Reporting

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Number

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Post Office Box 94125, Baton Rouge, LA 70804 recmgt@sos.la.gov Agency / Division / Section Agency No

In Office

ACT + 10 FY

ACT + 10 FY

ACT + 2 FY

ACT + 5 FY

ACT + 5 FY

P - Public Record

**Security Status Codes** 

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)

University of Louisiana Monroe / VP for Business Affairs / Controller / Financial

**Records Series Title** 

Work Papers for Financial Statements

Miscellaneous Scholarship Receivables

All Scholarship Reconciliation Reports

Accounts Receivable Sub-Ledgers Reports

Banner Student Payable Reconciliation Reports

LOA - Life of Agency

**Bank Reconciliation Reports** 

Unclaimed Property Reports

ACT - Active Period (when used define term in remarks column)

**Permitted Retention Period Abbreviations** 

FY- Fiscal Year (July 1- June 30)

CY - Calendar Year (Jan 1 - Dec 31)

AY - Academic Year (Aug 1 - July 31)

PERM - Permanent (Life of State)

FFY - Federal Fiscal Year (Oct 1 - Sept 30)

MO - Months WK - Week (Mon-Sun) DY - Day(s)

Banner A/R Reconciliation Reports

Scholarship Receivables Reconciliation Reports

SSARC-932 (09/20) Page 63 of 98 Indicate Use of Form ORIGINAL SUBMISSION X RENEWAL State Records Center REPLACEMENT PAGE ADDENDUM PAGE Remarks Vital V ACT = until end of FY in which created or received. ٧ ACT = until end of FY in which created or received. U ACT = until end of FY in which created or received. U ACT = until end of FY in which created or received. U ACT = until end of FY in which created or received. V ACT = until end of FY in which audited. ACT = until end of FY in which created or received. ACT = until end of FY in which created or received. ٧ ACT = until end of FY in which audited. V ACT = until end of FY in which audited. Agency Abbreviations A/R - Accounts Receivable

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series that contains born-digital or imaged records. Include brief description of the technology. (Ex. Scanned to OnBase).

NOTE: Please put an asterisk (\*) in the Remarks section for any record

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State Records Center

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Vital Record **Identification Code** 

I = Important

Use

Y - Yes

V= Vital

U= Useful

N - No

Total

Retention

PERM

PERM

ACT + 5 FY

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SSARC-932 (09/20) Page 64 of 98 recmgt@sos.la.gov Indicate Use of Form \_\_ORIGINAL SUBMISSION University of Louisiana Monroe / VP for Business Affairs / Controller / Financial X RENEWAL State Records Center \_\_REPLACEMENT PAGE ADDENDUM PAGE **Retention Period** Archival Security **Total** In Vital Remarks In Office Storage Retention ACT + 2 FY 3 FY ACT + 5 FY C S Ν U ACT = until end of FY in which created or received. ACT + 2 FY 3 FY ACT + 5 FY С S U N ACT = until end of FY in which created or received. ACT + 2 FY 3 FY ACT + 5 FY С S N U ACT = until end of FY in which created or received.

Permitted Retention Period Abbreviations	Security Status Co	odes	State Red	cords	Center	Agency Abbreviations
ACT - Active Period (when used define term in remarks column)	P - Public Record		Use			
FY- Fiscal Year (July 1- June 30)	M – May Contain Co	Confidential Information	Y – Yes			
CY - Calendar Year (Jan 1 - Dec 31)	C - Confidential Info	formation	N - No			
AY – Academic Year (Aug 1 – July 31)	Archival Processis	ng Codes	Vital Rec			
FFY – Federal Fiscal Year (Oct 1 – Sept 30)	A - Transfer to Stat	te Archives	Identifica	tion C	ode	
MO - Months WK - Week (Mon-Sun) DY - Day(s)	R – Retain in Agend	cy Archives	V= Vital			
PERM – Permanent (Life of State) LOA – Life of Agency	S - Review by State	e Archives	I ≃ Impor	tant		
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Louisiana State Archives-Records Management

Post Office Box 94125, Baton Rouge, LA 70804

Reporting

Agency / Division / Section

Return Checking Working Files

Reconciliation Reports

Graduate Assistant Waivers Receivable

**Records Series Title** 

Banner Unapplied Cash and Financial Aid Files

Louisiana Secretary of State

Agency No

066.000

Item

Number

11

12

13

1/10/2024

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Secretary of State, State Archives & Records Services

Louisiana State Archives—Records Management Page 65 of 98 Louisiana Secretary of State Post Office Box 94125, Baton Rouge, LA 70804 recmgt@sos.la.gov Indicate Use of Form Agency No Agency / Division / Section \_ORIGINAL SUBMISSION 066.000 University of Louisiana Monroe / VP for Business Affairs / Controller / Student Loans X RENEWAL State Records Center REPLACEMENT PAGE Item **Retention Period** Archival \_\_ADDENDUM PAGE Security **Records Series Title** Number Total ln Remarks Vital In Office Storage Retention 1 NBD 060 Report ACT + 1 FY 4 FY ACT + 5 FY С S Ν U ACT = until end of FY in which created or received. 2 EOM (End of the Month) Report ACT + 1 FY 4 FY ACT + 5 FY М S N ACT = until end of FY in which created or received. 3 LMS Mid-Month & End of Month Report С ACT + 1 FY 4 FY ACT + 5 FY S U Ν ACT = until end of FY in which created or received. 4 HPSL - Total Cancellations Report ACT + 1 FY С S 4 FY ACT + 5 FY Ν U ACT = until end of FY in which created or received. 5 NDSL - Total Cancellations Report ACT + 1 FY 4 FY ACT + 5 FY С S Ν U ACT = until end of FY in which created or received. 6 EOF (End of Year) Report V PERM 0 М R PERM Ν 7 Discrepancy List Report ACT + 5 FY 0 ACT + 5 FY М S Ν ACT = until end of FY in which created or received. 8 LMS Paid in Full Files С S ACT + 1 FY 4 FY U ACT = until end of FY in which created or received. ACT + 5 FY Ν 9 Federal Loans Outstanding ACT + 1 FY 4 FY ACT + 5 FY М S Ν U PERM until paid in full or transferred. 10 С S U Federal Government NDSL Report ACT + 2 FY 4 FY ACT + 5 FY N ACT = until end of FY in which created or received. **Permitted Retention Period Abbreviations** Security Status Codes State Records Center **Agency Abbreviations** Use ACT – Active Period (when used define term in remarks column) P - Public Record Y - Yes NBD 060 - Next Business Day - report that includes FY- Fiscal Year (July 1- June 30) M - May Contain Confidential Information loan balances, activity, and cohort rates N - No CY - Calendar Year (Jan 1 - Dec 31) C - Confidential Information EOM - End of Month AY - Academic Year (Aug 1 - July 31) **Archival Processing Codes** Vital Record LMS - Loan Management System Identification Code **HPSL - Health Professional Student Loans** FFY - Federal Fiscal Year (Oct 1 - Sept 30) A - Transfer to State Archives NDSL - National Direct Student Loan V= Vital MO - Months WK - Week (Mon-Sun) DY - Day(s) R - Retain in Agency Archives EOF - End of Year 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 O – Other (Specify in Remarks) series that contains born-digital or imaged records. Include brief

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Louisiana State Archives-Records Management

SSARC-932 (09/20)

Louisiana Se	ate Archives—Records Management ecretary of State	Page 66 of 98								
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Agency No <b>066.000</b>	Agency / Division / Section University of Louisiana Monroe / VP for Busines	lent Loans			sp.		ORIGINAL SUBMISSION  X_RENEWAL  REPLACEMENT PAGE			
ltem Number	Records Series Title	R	. ≥	<u></u>	Records		ADDENDUM PAGE			
Number	Records Series Title	In Office	In Storage	Total Retentio	u Security	Archival	State Re Center	Vital	Remarks	
11	Health Professional Loans – Nursing Loans Purchased by ULM Report	ACT + 2 FY	3 FY	ACT + 5 F	Y C	S	N	U	ACT = until end of FY in which created or received.	
12	Paid in Full Accounts (Folders) Files	ACT + 1 FY	4 FY	ACT + 5 F	Y C	s	N	U	ACT = until end of FY in which created or received.	
13	Paid Out Files	ACT + 1 FY	4 FY	ACT + 5 F	Y C	s	N	U	ACT = until end of FY in which created or received.	
14	NBD 060 Feed Journal Report	ACT + 1 FY	4 FY	ACT + 5 F	Y M	s	N	U	ACT = until end of FY in which created or received.	
15	Learning Management System Daily Payments Report	ACT + 5 FY	0	ACT + 5 F	Y C	s	N	U	ACT = until end of FY in which created or received.	
16	Tuition Payments Report	ACT + 1 FY	PERM	PERM	С	R	N	v	ACT = until end of FY in which created or received.	
17	End of the Year Report	ACT + 5 FY	PERM	PERM	С	R	N	v	ACT = until end of FY in which created or received.	
18	End of the Year NJY 600/630 cohort (01-03) Report	ACT + 5 FY	PERM	PERM	С	R	N	٧	ACT = until end of FY in which created or received.	
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Permitted Ret	tention Period Abbreviations	Security Status	Codes		State Re	cords	Center	L	Agency Abbreviations	
ACT – Active F	Period (when used define term in remarks column)	P – Public Reco	ord		Use					
	ar (July 1- June 30)	M - May Contain Confidential Information			Y – Yes				NBD 060 – Next Business Day – Daily Transaction Journal Report	
	r Year (Jan 1 – Dec 31)	C – Confidential Information			N - No				NJY – Name given a reporting form by the agency	
	c Year (Aug 1 – July 31)	Archival Proce	•		Vital Re Identific		ode:			
FFY – Federal Fiscal Year (Oct 1 – Sept 30)		A – Transfer to			V= Vital	~1011 C	, oue			
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SSARC-932 (09/20)

Louisiana Se	ate Archives—Records Management								Page 67 of 98
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1	Grant Folders	ACT + 6 CY	0	ACT + 6 (	CY M	s	N	1	ACT = until end of CY in which grant is closed out.
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	· Year (Jan 1 – Dec 31) c Year (Aug 1 – July 31)	C - Confidential							
	Fiscal Year (Oct 1 – Sept 30)	Archival Proce	•		Vital Rec		ode		
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	ate Archives—Records Management cretary of State								Page 69 of 98
ost Office B	ox 94125, Baton Rouge, LA 70804				recm	gt@so	s.la.go	V	Indicate Use of Form
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66.000	University of Louisiana Monroe / VP for Busine	ss Affairs / Con	troller / LaC	ар					X_RENEWAL
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Item Number	Records Series Title	Retention Period				<u>0</u>	Seco		ADDENDUM PAGE
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1	ACH Refunds Reports	ACT + 5 FY	0	ACT + 5 F	Y C	s	N	U	ACT = until end of FY in which created or received.
2	Student Direct Deposit Reports	ACT + 5 FY	0	ACT + 5 F	Y C	s	N	U	ACT = until end of FY in which created or received.
3	Cashier's Reports	ACT + 5 FY	0	ACT + 5 F	Y C	s	N	U	ACT = until end of FY in which created or received.
	ention Period Abbreviations	Security Status			State Re	cords	Center		Agency 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)		P – Public Record  M – May Contain Confidential Information  C – Confidential Information							LaCap – Louisiana Capitol Federal Credit Union ACH – Automated Clearing House
′ – Academic	c Year (Aug 1 – July 31)					ord			
FFY – Federal Fiscal Year (Oct 1 – Sept 30) MO – Months WK – Week (Mon-Sun) DY - Day(s)		A – Transfer to	State Archives		Identifica	ition C	ode		
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JAN 2 2 2024

SSARC-932 (09/20) Louisiana State Archives-Records Management Page 70 of 98 Louisiana Secretary of State Post Office Box 94125, Baton Rouge, LA 70804 recmat@sos.la.gov Indicate Use of Form Agency No Agency / Division / Section \_ORIGINAL SUBMISSION 066,000 University of Louisiana Monroe / VP for Business Affairs / Facilities, Capital Projects, \_\_RENEWAL and Environmental Health & Safety State Records Center REPLACEMENT PAGE Item **Retention Period** X\_ADDENDUM PAGE Archival **Records Series Title** Number **Total** ln Vital Remarks In Office Storage Retention 1 Architectural Files PERM 0 PERM М R V Ν 2 **Payroll Action Forms** 3 FY ACT + 5 FY М S U ACT + 2 FY Ν ACT = until end of FY in which created or received. 3 Capital Outlay Requests Budgets ACT + 5 FY 5 FY ACT + 10 FY Р S Ν U ACT = until end of FY in which created or received. 4 Fire Marshall Inspections ACT + 5 FY 0 ACT + 5 FY М S U Ν ACT = until end of FY in which created or received. 5 Project Director General Files ACT + 2 FY 2 FY ACT + 4 FY M S Ν U ACT = until end of FY in which created or received. 6 Risk Management Claims 0 М S U ACT = until end of FY in which created or received. ACT + 5 FY ACT + 5 FY **Permitted Retention Period Abbreviations Security Status Codes** State Records Center **Agency Abbreviations** Use ACT - Active Period (when used define term in remarks column) P -- Public Record Y - Yes FY- Fiscal Year (July 1- June 30) M - May Contain Confidential Information N - No 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

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O - Other (Specify in Remarks)

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