

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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recmgt@sos.la.gov

Agency No 066.000	Agency / Division / Section University of Louisiana Monroe / VP for Business Affairs / Human Resources				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	Employee Personnel Files – Classified	ACT + 5 FY	PERM	PERM	M	S	N	V	ACT = until end of FY in which employee separates from agency.	
2	Employee Personnel Files – Unclassified	ACT + 5 FY	PERM	PERM	M	S	N	V	ACT = until end of FY in which employee separates from agency.	
3	Employment Verification Forms (I-3)	ACT + 5 FY	0	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which created or received.	
4	Job Description Files	ACT+ 10 FY	1 FY	ACT + 11 FY	M	S	N	U	ACT = until end of FY in which superseded or abolished.	
5	Employee Medical Files	ACT + 5 FY	PERM	PERM	C	R	N	V	ACT = until end of FY in which created or received.	
6	Job Applicant Files	ACT + 2 FY	0	ACT + 2 FY	M	S	N	U	ACT = until end of FY in which created or received.	
7	Outside Disclosure Files	ACT + 5 FY	5 FY	ACT + 10 FY	C	S	N	U	ACT = until end of FY in which created or received.	
8	Employee I-9	ACT + 2 FY	1 FY	ACT + 3 FY	C	S	N	U	ACT = until end of FY in which employee separates from agency.	
9	Performance Evaluations	ACT + 3 FY	2 FY	ACT + 5 FY	C	S	N	U	ACT = until end of FY in which employee separates from agency.	
10	Employee & Dependent Tuition Waiver Application Records	ACT + 2 FY	PERM	PERM	M	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			

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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		In Office	In Storage	Total Retention					Remarks	
11	Employee Insurance Files	ACT + 2 FY	PERM	PERM	C	R	N	V	Act = until end of FY in which created or received.	
12	Employee Insurance Beneficiary Forms	ACT + 2 FY	PERM	PERM	C	R	N	V	Act = until end of FY in which created or received.	
13	Casual Wage & Part-Time Personnel Files	ACT + 2 FY	PERM	PERM	M	S	N	V	Act = until end of FY in which employee separates from agency.	
14	Student Worker Personnel Files	ACT + 5 FY	PERM	PERM	M	S	N	V	ACT = until end of FY in which student worker separates from agency.	
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Agency No 066.000	Agency / Division / Section University of Louisiana Monroe / VP for Business Affairs / Purchasing				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	Requisitions	ACT + 3 FY	2 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.	
2	Yearly Vendor Copy	ACT + 3 FY	2 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.	
3	Sealed Bid Documents	ACT + 3 FY	2 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which expires or is terminated.	
4	Purchase Orders	ACT + 3 FY	2 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.	
5	Vehicle Purchases (Titles)	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY vehicle disposed or in surplus.	
6	Vehicle Bill of Sale	PERM	0	PERM	P	R	N	V		
7	Personal, Professional, Consulting, & Social (PPCS) Contracts	ACT + 2 FY	5 FY	ACT + 7 FY	C	S	N	U	ACT = until end of FY in which expires or is terminated.	
8	Major Repair Bids	ACT + 3 FY	2 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.	
9	Agreements	ACT + 2 FY	5 FY	ACT + 7 FY	M	S	N	U	ACT = until end of FY in which expires or is terminated.	
10	Property Leases	ACT + 7 FY	0	ACT + 7 FY	M	S	N	U	ACT = until end of FY in which expires or is terminated.	
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Agency No	Agency / Division / Section				Security	Archival	State Records Center	Vital	Remarks
066.000	University of Louisiana Monroe / VP for Business Affairs / Purchasing								
Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
		In Office	In Storage	Total Retention					
11	Purchasing Card (P-Card) Statements	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY of statement period.
12	Change Orders	ACT + 3 FY	2 FY	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
13	Request for Proposals	ACT + 5 FY	0	ACT + 5 FY	M	S	N	U	ACT = until end of FY in which created or received.
14	Certificate of Insurance	ACT + 10 CY	0	ACT + 10 CY	M	S	N	U	ACT = Until end of CY in which certificate expires.
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Secretary of State, State Archives & Records Services

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Item Number	Records Series Title	In Office	In Storage	Total Retention					
066.000	University of Louisiana Monroe / VP for Business Affairs / Physical Plant								
1	Key Request Forms	PERM	0	PERM	M	R	N	V	
2	Preventive Maintenance Work Orders	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
3	Interdepartmental Billing	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
4	Vehicle Log Sheets/ Gas Tickets	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
5	Payroll Records	ACT + 5 CY	0	ACT + 5 CY	M	S	N	U	ACT = until end of CY in which created or received.
6	Warehouse Requisitions	ACT + 3 FY	3 FY	ACT + 6 FY	M	S	N	U	ACT = until end of FY in which created or received.
7	Service Request	ACT + 3 FY	0	ACT + 3 FY	M	S	N	U	ACT = until end of FY in which created or received.
8	General Personnel Files	PERM	0	PERM	M	S	N	V	
9	Purchase Orders	ACT + 3 FY	0	ACT + 8 FY	M	S	N	U	ACT = until end of FY in which created or received.
10	Payroll Vouchers	ACT + 2 FY	2 FY	ACT + 4 FY	M	S	N	U	ACT = until end of FY in which created or received.
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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 / VP for Business Affairs / Physical Plant / Property Control								<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	Land Acquisitions Records	PERM	0	PERM	M	R	N	V		
2	Tagging Sheets	PERM	0	PERM	M	R	N	V		
3	Invoices	PERM	0	PERM	M	R	N	V		
4	Vehicle Files	PERM	0	PERM	M	R	N	V		
5	Stolen Property Police Reports	ACT + 5 CY	0	ACT + 5 CY	M	S	N	U	ACT = until end of CY in which created or received.	
6	ORM Exposure Reports	ACT + 5 CY	0	ACT + 5 CY	M	S	N	U	ACT = until end of CY in which created or received.	
7	LPAA Reports	ACT + 10 CY	0	ACT + 10 CY	M	S	N	U	ACT = until end of CY in which created or received.	
8	Building Files	PERM	0	PERM	M	R	N	V		
9	Original Requests	ACT + 5 CY	0	ACT + 5 CY	M	S	N	U	ACT = until end of CY in which created or received. Property control request forms from campus offices.	
10	Property Control (PC) Forms	ACT + 10 CY	0	ACT + 10 CY	M	S	N	U	ACT = until end of CY in which created or received. Completed forms for property inventory changes which are needed for reference.	
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Amy M. La
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 / Vice President for Enrollment Management and University Relations								
1	Marketing Campaign Records	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end FY in which created or received.
2	Marketing Events	ACT + 3 FY	0	ACT + 3 FY	P	S	N	U	ACT = until end FY in which created or received.
3	Marketing Contracts	ACT + 10 FY	0	ACT + 10 FY	P	S	N	U	ACT = until end FY in which contract lapses.
4	Digital Image (photo & video)	ACT + 5 FY	PERM	PERM	P	R	N	V	ACT = until end FY in which created or received. Transfer to University Archives for perm retention.
5	Presidential Records	ACT + 10 FY	PERM	PERM	P	R	N	V	ACT = until end FY in which created or received.
6	Graphic Design Files	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end FY in which created or received.
7	Press Releases	ACT + 5 FY	PERM	PERM	P	R	N	V	ACT = until end FY in which created or received. Transfer to University Archives for perm retention.
8	Office Records	ACT + 5 FY	0	ACT + 5 FY	P	S	N	U	ACT = until end FY in which created or received.
9	Publications	ACT + 5 FY	PERM	PERM	P	R	N	V	ACT = until end FY in which created or received. Transfer to University Archives for perm retention.
10	University Policies & Guidelines	ACT + 5 FY	PERM	PERM	P	R	N	V	ACT = until end FY in which suspended or abolished. Transfer to University Archives for perm retention.
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ADDENDUM PAGE

Remarks

ACT = until end 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)

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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

I = Important

U= Useful

Agency Abbreviations

Heather R. Pilcher

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Amy N. Mearns
Secretary of State, State Archives & Records

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