

Records Retention Schedule

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

SSARC-932 (09/20)

Page 20 of 97

recmgt@sos.la.gov

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 & Vice President for Academic Affairs / College of Health Sciences / Kitty Degree School of Nursing								
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	
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	
5	Student Clinical Folders	ACT + 1 CY	0	ACT + 1 CY	C	S	N	V	
6	Assessment/ Evaluation Diagnostic Reports	ACT + 1 CY	0	ACT + 1 CY	C	S	N	I	
7	Test Scantrons	ACT + 1 AY	0	ACT + 1 AY	C	S	N	U	
8	Keyed Test Booklets & Test Analysis	ACT + 5 AY	0	ACT + 5 AY	C	S	N	V	
9	Grade Book or Grade Sheet for Each Course	ACT + 3 FY	0	ACT + 3 FY	C	S	N	V	
10	Clinical Contracts	ACT + 5 CY	0	ACT + 5 CY	C	S	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			State Records Center Use Y – Yes N - No		Agency Abbreviations		
		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				

Indicate Use of Form

ORIGINAL SUBMISSION
 RENEWAL
 REPLACEMENT PAGE
 ADDENDUM PAGE

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Amy Mora
 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 21 of 97

recmgt@sos.la.gov

Agency No	Agency / Division / Section	In Office	In Storage	Total Retention	Security	Archival	State Records Center	Vital	Remarks	
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						
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			State Records Center Use Y – Yes N - No			Agency Abbreviations		
		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					

Indicate Use of Form

ORIGINAL SUBMISSION
 RENEWAL
 REPLACEMENT PAGE
 ADDENDUM PAGE

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Amy Mora
 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 22 of 97

recmgt@sos.la.gov

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 / 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			State Records Center Use Y – Yes N - No		Agency Abbreviations		
		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				

Indicate Use of Form

ORIGINAL SUBMISSION
 RENEWAL
 REPLACEMENT PAGE
 ADDENDUM PAGE

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Amy Mora
 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 23 of 97

recmq@sos.la.gov

Agency No	Agency / Division / Section	Security	Archival	State Records Center	Vital	Retention Period				Remarks
						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 / Kinesiology									
1	Course Syllabi	P	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which created or received.
2	Course Grades	C	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which created or received.
3	Human Performance Lab Requisitions	P	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which created or received.
4	Printing Requisitions	P	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which created or received.
5	Faculty Folders	C	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which no longer employed.
6	Faculty Timesheets	M	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which created or received.
7	Student Worker Folders	M	S	N	I	ACT + 6 CY	0	ACT + 6 CY		ACT = until end of CY in which student is no longer enrolled.
8	Graduate Assistantship Folders	M	S	N	I	ACT + 3 FY	0	ACT + 3 FY		ACT = until end of FY in which student is no longer enrolled.
9	Civil Service Folder	M	S	N	I	ACT + 6 FY	0	ACT + 6 FY		ACT = until end of FY in which no longer employed.
10	Budget Transfer	P	S	N	I	ACT + 6 FY	0	ACT + 6 FY		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				

Indicate Use of Form

ORIGINAL SUBMISSION
 RENEWAL
 REPLACEMENT PAGE
 ADDENDUM PAGE

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed


 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 24 of 97

recmgt@sos.la.gov

Indicate Use of Form

- ORIGINAL SUBMISSION
- RENEWAL
- REPLACEMENT PAGE
- ADDENDUM PAGE

Agency No	Agency / Division / Section	Item Number	Records Series Title	Retention Period			Security	Archival	State Records Center	Vital	Remarks
				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 / Kinesiology										
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.	
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) FERM – 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 Moran
 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 25 of 97

recmgmt@sos.la.gov

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								___ ORIGINAL SUBMISSION <input checked="" type="checkbox"/> RENEWAL ___ REPLACEMENT PAGE ___ 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		Security Status Codes			State Records Center Use			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) 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).		P – Public Record M – May Contain Confidential Information C – Confidential Information			Y – Yes N - No					
		Archival Processing Codes			Vital Record Identification Code					
		A – Transfer to State Archives R – Retain in Agency Archives S – Review by State Archives O – Other (Specify in Remarks)			V= Vital I = Important U= Useful					

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed


 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 26 of 97

recmgt@sos.la.gov

Agency No	Agency / Division / Section	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 / Dental Hygiene								
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.
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		State Records Center Use Y – Yes N - No		Agency Abbreviations			
		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					

Indicate Use of Form

ORIGINAL SUBMISSION
 RENEWAL
 REPLACEMENT PAGE
 ADDENDUM PAGE

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Cathy Mera
 Secretary of State, State Archives & Records Services

JAN 22 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 27 of 97 R2024-359 MMM

recmgt@sos.la.gov

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					
<i>le6</i>	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/Clinical Folders	PERM	0	PERM	C	R	N	V	
2	Exam/ Scantrons/ Analyses	ACT + 1AY	0	ACT + 1AY	C	S	N	U	
3	Course Grade Book/ Grade Sheets	ACT + 5AY	0	ACT + 5AY	C	S	N	U	

Indicate Use of Form

ORIGINAL SUBMISSION
 RENEWAL
 REPLACEMENT PAGE
 ADDENDUM PAGE

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

Heather R. Pilcher
 Agency Approval

4/23/2024
 Date Signed

Amy Moreno
 Secretary of State, State Archives & Records Services

APR 24 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 28 of 97

recmgt@sos.la.gov

Indicate Use of Form

- ORIGINAL SUBMISSION
- RENEWAL
- REPLACEMENT PAGE
- ADDENDUM PAGE

Agency No	Agency / Division / Section	In Office	In Storage	Total Retention	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 / Occupational Therapy								
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	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.
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			State Records Center Use Y – Yes N - No		Agency Abbreviations ACOTE – The Accreditation Council of Occupational Therapy Education		
		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				

Heather R. Pilcher
 Agency Approval

1/10/2024
 Date Signed

Amy Moran
 Secretary of State, State Archives & Records Services

JAN 2 2 2024
 Date Approved

Records Retention Schedule

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

SSARC-932 (09/20)

Page 29 of 97

recmgt@sos.la.gov

Agency No	Agency / Division / Section	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 / Physical Therapy								
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