## Records Retention Schedule

**Louisiana Secretary of State, Division of Archives, Records Management and History**  
Post Office Box 94125, Baton Rouge, LA 70804  
Http://www.sos.louisiana.gov

<table>
<thead>
<tr>
<th>Item Number</th>
<th>Records Series Title</th>
<th>Retention Period</th>
<th>In Office</th>
<th>In Storage</th>
<th>Total Retention</th>
<th>Security</th>
<th>Archival</th>
<th>State Records Center</th>
<th>Vital</th>
<th>Remarks</th>
</tr>
</thead>
</table>
| 1           | Accounts Receivables                                                                 | ACT + 3 FY       | 0         | ACT + 3 FY | P               | S        | N        | V                    |       | Act = Until Audit – Image upon arrival and destroy originals after inspection and SOS approval.  
May contain confidential information. |
| 2           | Time & Attendance Records (includes time & recap sheets, vacation & leave, comp. time). | 2 FY             | 3 FY      | 5 FY       | P               | S        | Y        | V                    |       | Audits are maintained by Auditor’s Office |
| 3           | Audit Reports (Audits done by Legislative Auditor or submitted to Legislative Auditor) | 3 FY             | 0         | 3 FY       | P               | S        | N        | U                    |       | |
| 4           | Audit Reports (Done for office by CPA or private firms not submitted to Legislative Auditor) | PERM             | 0         | PERM       | P               | R        | N        | I                    |       | Microfilm after 5 calendar years. |
| 5           | Bank Statements and Reconciliation reports                                            | 3 FY             | 2 FY      | 5 FY       | P               | S        | Y        | V                    |       | |
| 6           | Budgets – Original Requests                                                           | PERM             | 0         | PERM       | P               | R        | N        | I                    |       | Microfilm after 10 calendar years. |
| 7           | Budgets – Workpapers and backups                                                     | 3 FY             | 0         | 3 FY       | P               | S        | N        | I                    |       | May contain confidential information |
| 8           | Cancelled Checks                                                                     | ACT + 3 FY       | 0         | ACT + 3 FY | M               | S        | N        | I                    |       | Act = Until audit – May contain confidential information.  
Break CDs to destroy or Burn/Shred checks.  
May contain confidential information. |
| 9           | Invoices – (Non Grant Related)                                                       | ACT + 3 FY       | 0         | ACT + 3 FY | P               | S        | N        | V                    |       | Act = Until grant expires. |
| 10          | Invoices – Grant Related                                                              | ACT + 2 FFY      | 3 FFY    | ACT + 5 FFY | P               | S        | Y        | 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  
DY - Day(s)  
PERM – Permanent

**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**  
CPA= Certified Public Accountant  
CD= Compact Disc

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Agency Approval [Signature]  
Date Signed [Date]  
Secretary of State, State Archives & Records Services [Signature]  
Date Approved [Date]
### Records Retention Schedule

_Records Retention Schedule_  

SS ARC 932 (07/07)  

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#### SAMPLE AGENCY – SAMPLE DIVISION- SAMPLE SECTION

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<td>In Storage</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Commission Board Meeting Minutes</td>
<td>Perm</td>
<td>0</td>
<td>Perm</td>
<td>P   A   N   V</td>
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<tr>
<td>12</td>
<td>Commission Board Meeting Tapes</td>
<td>3 CY</td>
<td>0</td>
<td>3 CY</td>
<td>P   S   N   U</td>
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<tr>
<td>13</td>
<td>Correspondence – Routine</td>
<td>1 FY</td>
<td>0</td>
<td>1 FY</td>
<td>M   S   N   U</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Correspondence – General (subject related)</td>
<td>2 FY</td>
<td>1 FY</td>
<td>3 FY</td>
<td>M   S   Y   U</td>
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<tr>
<td>15</td>
<td>Correspondence – Policy - related</td>
<td>PERM</td>
<td>0</td>
<td>PERM</td>
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**Agency Approval**  

**Date Signed**  

**Secretary of State, State Archives & Records Services**  

**Date Approved**