



Common NMSU Retention Schedules for DIVISION/DEPARTMENT/UNIT Files
Records Management and Retention (RMR)
FSA - RMR Office
 (Per Functional Records Retention and Disposition Schedules (FRRDS))

Documents ¹	FRRDS Record Classification Number & Title	Retention Requirement	Confidential
Financial Files			
Bookstore Charges File	NON-RECORD	As needed, to be determined by department	No
Budget Reconciliation	NON-RECORD	As needed, to be determined by department	Contextual ²
Check Distribution Lists	NON-RECORD	As needed, to be determined by department	No
Contracts ⁶	NON-RECORD	As needed, to be determined by department	Contextual ²
Grants	<u>1.21.2.122 GRANT ADMINISTRATION</u>	Three years from date project closed per SPA Closeout Policy	Contextual ²
Deposits	NON-RECORD	As needed, to be determined by department	Contextual ²
Direct Pays File ⁷	NON-RECORD ⁷	As needed, to be determined by department	No
Inventory Certifications, Change Reports, and Verification Lists	<u>1.21.2.316 FIXED ASSETS</u>	Three years from date audit report released	No
Invoices File ⁷	NON-RECORD ⁷	As needed, to be determined by department	No
Journal Voucher File ⁷	NON-RECORD ⁷	As needed, to be determined by department	No
Labor Redistribution Forms File	NON-RECORD ⁷	As needed, to be determined by department	No
Maintenance Agreements (Hardware & Software)	NON-RECORD	As needed, to be determined by department	No
Payment/Reimbursement Requests File (including Payment Requests, Travel Advances, Travel Expense Report and Employee Non-Travel) ⁷	NON-RECORD ⁷	As needed, to be determined by department	Contextual ²
Procurement Card File ^{3,7}	<u>1.21.2.301 ACCOUNTS PAYABLE⁷</u>	Six years from date audit report released	No ³
Purchase Order File	NON-RECORD ⁷	As needed, to be determined by department	No
Surplus Property	<u>1.21.2.318 SURPLUS AND DISPOSAL</u>	Three years from date audit report released	No
Telephone Bills File	NON-RECORD	As needed, to be determined by department	Contextual ²
Time Sheets	NON-RECORD	As needed, to be determined by department	Yes
HR Files			
Leave Requests and Leave Balances File (if prior to Banner)	<u>1.21.2.231 LEAVE RECORDS</u>	Three years from close of fiscal year in which created	Yes
Personnel Files	<u>1.21.2.234 PERSONNEL FILES</u>	Three years from date employee terms or leaves the department	Yes
Rejected Applications File ⁴	<u>1.21.2.107 DENIED, REJECTED OR WITHDRAWN RECORDS</u>	Two years from date rejected	Yes
Office Operations Files			
Conferences/Workshops Attended File	NON-RECORD	As needed, to be determined by department	No
Correspondence File	<u>1.21.2.105 CORRESPONDENCE - GENERAL</u>	One year from close of calendar year in which created	No
Daily appointment books/calendars	<u>1.21.2102 CALENDARS AND SCHEDULES</u>	One year from close of calendar year in which created	No
Office Management Files (<i>routine files⁵, convenience copies of memos, reports, & general office information</i>)	NON-RECORD	As needed, to be determined by department	No
Operating Manuals/Warranties File	<u>1.21.151 EQUIPMENT FILES</u>	Three years from date of disposition of equipment	No
Supplies File	<u>1.21.2.317 INVENTORIES</u>	Three years from date audit report released	No
Telephone Logs File	<u>1.21.2.110 LOGS</u>	Until no longer needed for reference	Yes
Work Orders File	NON-RECORD	As needed, to be determined by department	No
Web Pages	<u>1.21.2.158 WEB MANAGEMENT</u>	One year from date superseded or obsolete	No
Student Files			
Student Employee File	<u>1.21.2.234 PERSONNEL FILES</u>	Three years from date employee terms or leaves the department	Yes

1 This is only a representative set of typical files found in most Departments. It is not intended to be a comprehensive list. For retention requirements for other files, reference the FRRDS at our web site, <http://rmr.nmsu.edu/NMACs>.

2 If the record contains personally identifiable information, it is considered a confidential record. If not, it is a non-confidential record.

3 Procurement Card Files are non-confidential unless the credit card number or employee personal information (i.e. address, phone, etc.) appears on the receipt.

4 If not duplicated in PeopleAdmin.

5 Office Management Files include items which serve to convey information of temporary importance in lieu of oral communication and are only required for a limited time to ensure the completion of a routine action or the preparation of a subsequent record. They are not required to control, support or to document the operations of the unit.

6 Contracts are non-records for other units if finalized by Procurement, Legal or the President's Office.

7 If documents are related to a grant, they should go in the department's Grant File. SPA does not have these and you may be required to produce them.