

**This is an amendment to 1.21.2 NMAC, Sections 7, 105, 336, and 337, effective xx/xx/xxxx.**

**1.21.2.7 DEFINITIONS:** The following terms shall have the respective meanings provided in this rule. Terms not defined in this rule which are defined in the Public Records Act, Section 14-3-1 et seq. NMSA 1978 shall have the respective meanings accorded such terms in the act.

**A. “Archives”** means the permanent records of the state of New Mexico, which may include government and private collections of the Spanish, Mexican, territorial and statehood periods, assessed to have significant historical value to warrant their preservation by the state of New Mexico.

**B. “Disposition”** means final action that puts into effect the results of an appraisal decision for a series of records (i.e., transfer to archives or destruction).

**C. “Executive level”** means elected and appointed officials, statutory agency heads and management personnel with decision making authority granted by the agency head.

**D. “File closed”** means the date the trigger event occurred, or, for electronic records, equivalent to the date last modified unless otherwise stated in retention.

**E. “Historical”** means records deemed to have archival value by the commission.

**F. “Non-record”** means extra copies of documents kept solely for convenience of reference, stocks of publications, [~~transitory records,~~] records not usually included within the scope of the official records of an agency or government entity and library material intended only for reference or exhibition. The following specific types of materials are non-records: materials neither made nor received in pursuance of statutory requirements nor in connection with the functional responsibility of the officer or agency, extra copies of official records, preliminary drafts, blank forms, transmittal letters or forms that do not add information, sample letters, and reading files or informational files.

**G. “Official copy of record”** the single record determined to be the official copy for the purposes of fulfilling the retention requirements.

**H. “Retention”** means the period of time during which the official copy of record shall be maintained by an organization because they are needed for operational, legal, fiscal, historical or other purposes.

**I. “Transitory”** [~~means messages which serve to convey information of temporary importance in lieu of oral communication. Transitory messages are only required for a limited time to ensure the completion of a routine action or the preparation of a subsequent record. Transitory messages are not required to control, support or to document the operations of government.~~] means records of temporary usefulness in any format or medium, created or received by a public body in carrying out its activities.

**J. “Trigger event”** means the closing event of a record which begins the retention period.  
[1.21.2.7 NMAC - N, 10/01/2015; A, 11/30/2016; A, xx/xx/xxxx]

**1.21.2.105 CORRESPONDENCE - GENERAL:**

**A. Category:** Administration - general management

**B. Description:** [~~Routine correspondence and related records of day to day office administration and not identified in other classifications.~~] Records related to day-to-day office administration, routine correspondence and transitory records not identified in other classifications.

**C. Retention:** destroy one year from close of calendar year in which created  
[1.21.2.105 NMAC - N, 10/01/2015; A, xx/xx/xxxx]

**1.21.2.336 CASE FILES - LOANS:**

**A. Category:** Financial and accounting – [~~grant,~~] financial aid and loan management

**B. Description:** Records related to loan programs including, but not limited to, loan documents and tracking.

**C. Retention:** destroy three years from close of fiscal year in which file closed  
[1.21.2.336 NMAC - N, 10/01/2015; A, xx/xx/xxxx]

**1.21.2.337 EDUCATIONAL FINANCIAL AID:**

**A. Category:** Financial and accounting – [~~grant,~~] financial aid and loan management

**B. Description:** Records related to scholarships, loans, grants and other aid.

**C. Retention:** destroy three years from the date file closed  
[1.21.2.337 NMAC - N, 10/01/2015; A, xx/xx/xxxx]