



Managing University Records

Under the *Virginia Public Records Act*, Virginia Tech is subject to state records management guidelines. University records must be retained for a specified minimum period and disposed of in a proper and timely way. Further guidance can be found in university [Policy 2000](#) – Management of University Records. Forms and other useful information can also be found at the university records management [website](#).

Selecting a Method of Destruction

Records coordinators must ensure that confidential or privacy-protected information contained in records and non-records is securely destroyed. Confidential destruction of paper is accomplished only through shredding, pulping, or burning. For electronic information, it is accomplished by overwriting the data or physically destroying the media.

Certifying Records Destruction

Remember to complete the [online destruction form](#) before disposing of official records. Official records are only those records which are maintained in your unit to serve as original record copies. You do not need to request a destruction certificate when destroying convenience copies of records which are officially maintained by other offices.

Finding More Retention Guidance

This abbreviated records retention schedule contains disposition guidance for records commonly created by Virginia Tech departments. It is drawn from the overall [state agency retention schedules](#) created by the Library of Virginia's records management office. For more information, please contact recmgmt@vt.edu.

1 Financial Management

102-012103

Financial Accounting Reports

This series documents regulatory compliance and accuracy in transaction processing, such as tracking of income and expenditures. Should be applied to monthly fiscal reconciliation records associated with University Policy 3100 compliance.

Retain 3 years after end of fiscal year; non-confidential destruction

102-012083

Accounts Receivable

This series documents moneys owed to the agency by its debtors. The series may include, but is not limited to: bills, invoices, receipts, deposit slips, and reimbursement documentation.

Retain 3 years after end of fiscal year; non-confidential destruction

102-012082

Accounts Payable

This series documents moneys to be paid by the agency to its creditors. The series may include, but is not limited to: invoices, receipts, bills, canceled checks, returned checks, check registers, and checking statements.

Retain 3 years after end of fiscal year; non-confidential destruction

102-200109

Cash and Bank Reports

This series may include, but is not limited to cash reports, transmittal and settlement records, warrant records, bank statements, and reconciliation documentation.

Retain 3 years after end of fiscal year; non-confidential destruction

102-007028

Surplus Property Disposal

This series documents the disposition of property by the agency that has been declared as surplus and no longer needed for use. This series may include but is not limited to bill of sale and supporting documentation.

Retain 3 years after end of fiscal year; non-confidential destruction

102-012154

Vendor Files

This series documents the agency's dealing with various vendors who provide goods and services. This series may include, but is not limited to correspondence, contracts, and agreements.

Retain until after no longer administratively useful; non-confidential destruction

102-200114

Purchasing Records

Documents the purchasing of equipment, goods, services, and supplies by the agency. This series may include, but is not limited to bids, bid proposals, agreements, purchase orders, and requisitions.

Retain 5 years after end of fiscal year; confidential destruction

102-200113

Payroll Records

This series documents the payroll activities of the agency. This series may include but is not limited to deduction authorizations and registers, leave records, ledgers and reports, compensation files, retirement contributions, time and attendance records, and time sheets.

Retain 5 years after end of fiscal year; confidential destruction

102-012151**Reimbursement Records**

Documents the reimbursement of money to or from the agency. This series may include but is not limited to travel expense reimbursement and overpayment documentation.

Per [VT Controller's Office Procedure 20335v](#): Original receipts must be kept by the department for one year after the end of the fiscal year in which the reimbursement requests were created.

Retain 3 years after end of fiscal year; confidential destruction

102-200110**Contracts**

This series documents contracts and agreements entered by the agency. This series may include but is not limited to contract and supporting documentation.

Retain 5 years after expiration; non-confidential destruction

2 Human Resources Management

103-012185**Recruitment, Hiring, Interview, and Selection Records**

Documents the process and result of recruiting, selecting, and hiring. This series may include but is not limited to: applications of selected and rejected applicants, position descriptions, copies of announcements and advertisements, selection criteria, evaluations, interview notes, tests, work samples, and rankings.

Retain 3 years after event; confidential destruction

103-100485

Wage Employee Personnel Records (Hiring Department)

The Division of Human Resources does not establish individual personnel files for wage employees. The hiring department has primary responsibility for the establishment and maintenance of the following records: any record describing the wage employee's job responsibilities and tasks (i.e., the Wage Employment Information Supplement form (P12W), a copy of the employee's application or resume, a copy of the employee's offer letter (with the exception of emergency and sporadic hires), any documentation of employee performance, if the department has an evaluation process, and original transcript with official raised seal from the institutional source (required for all faculty who will be teaching).

Wage employee personnel records should include only employment-related documents such as employee history, including hiring, promotion, evaluation, and disciplinary actions.

Retain 50 years after separation; confidential destruction

Offsite storage is available for closed paper wage personnel files at university records center; please contact recmgmt@vt.edu for details.

103-012072

Salaried Employee Personnel Records (Hiring Department)

This series should include but is not limited to: a copy of the employee's application or resume, a copy of the employee's offer letter, any documentation of employee performance created outside the university's electronic performance management system, and an original transcript with official raised seal from the institutional source (required for all faculty who will be teaching).

For more information, please consult [VT Policy 4085](#), Retention of Employee Personnel Records

Retain 5 years after separation; confidential destruction

103-100499**Promotion, Demotion, Separation, or Tenure Records**

This series documents the decisions made regarding promotion, demotion, separation, layoff, termination, or tenure for a particular position or group of positions. This series may include, but is not limited to: staffing templates, budget reports, performance and composite data, and position evaluations.

Retain 2 years after decision; confidential destruction

111-200554**Promotion and Tenure Records: Supporting Documentation**

This series documents the promotion and tenure process for an individual faculty member. This series includes, but is not limited to: letters of recommendation, current curriculum vitae, research summaries, published papers, and documentation of awards/accolades, committee work, presentations, and grant participation.

Retain 5 years after decision; confidential destruction

3 Academic Department Management

111-101081**Student Examination Files**

Documents work completed by students for grades in a course. This series may include, but is not limited to: exams, quizzes, tests, and term papers.

Retain 1 years after end of semester; confidential destruction

111-101082**Academic Departments: Department/School Files - Undergraduate Students**

This series documents the monitoring of undergraduate student status, history and grades within the academic department or school. This series may include, but is not limited to: approval of summer coursework, transfer credits, leave/withdrawal, veterans status info, international studies visa application, dean/department notes, readmission application, and scholarships/awards.

Retain 5 years after graduation, withdrawal, or last action; confidential destruction

111-101083**Academic Departments: Department/School Files - Graduate Students**

This series documents the monitoring of graduate student status, history and grades within the academic department or school. This series may include, but is not limited to: approval of summer coursework, transfer credits, leave/withdrawal, veterans status info, international studies visa application, dean/department notes, readmission application, scholarships/awards, and committee/thesis paperwork.

Retain 10 years after graduation, withdrawal, or last action; confidential destruction

101-012019**Correspondence & Subject Files: Routine, Administrative**

This series consists of incoming and outgoing letters, memorandum, faxes, notes and their attachments of a routing administrative nature, not listed on an agency specific schedule, in any physical format including, but not limited to, paper and e-mail.

Retain as long as administratively useful; non-confidential destruction

3 Research Records

Please consult Office of Sponsored Programs Procedure [10014 Records Retention](#)

4 Virginia Cooperative Extension Offices

101-100302

4-H Administrative Files

When submitting a Certificate of Records Destruction request, please use 101-100302 as a records series number and consult the [VCE Retention Schedule for 4-H Forms](#) for specific retention guidance.

Retention varies; all records containing personal information requires confidential destruction

101-100302

Family Nutrition Program Files

When submitting a Certificate of Records Destruction request, please use 101-100302 as a records series number and consult the [Family Nutrition Program Policy and Procedures Manual](#) for specific retention guidance (Records and Forms to Be Completed by FNP Program Assistants, p. 70).

Retention varies; all records containing personal information requires confidential destruction

Revision History

Version	Date of Approval	Extent of Revision
1.0	April 2017	Creation of new format and establishment of version numbering system for the pre-existing VT Abbreviated Records Retention Schedule, which had last been updated in April 2016. Adopted 102-012103 (Financial Accounting Reports) as the recommended records series number for describing non-purchasing and non-payroll monthly reconciliation records; reconciliation records were previously handled as 102-200109 (Cash and Bank Reports); retention remains the same: 3 years after end of FY.
1.1	July 2017	Added graduate and undergraduate student records to Academic Department Management Section.
1.2	September 2017	Updated links to point to new departmental web site. To increase coverage and utility of this document, added several additional records series.
1.3	September 2018	Retention periods remain the same for all listed series. Added guidance on departmental maintenance of grant records. Other minor changes for purposes of clarity.
1.4	October 2022	Updated branding, links, and formatting. Removed references to “shred” and “recycle” in favor of standard “confidential” and “non-confidential” destruction language.