**HERITAGE AND INFORMATION GOVERNANCE**
**Records Retention Schedule for Student Financial Support**

This category covers all financial support funds which are available to students, regardless of whether students must apply for them or whether they are selected to receive them (e.g. bursaries or prizes).

This retention schedule is based on the recommendations made by the Joint Information Systems Committee. The letter indicates the final disposition of each type of record, and applies to original records. Where copies of originals are kept locally, these can be destroyed when these are no longer required.

- **A** = 1 copy to be transferred to the University Archive. See Retention Schedule Guidelines for further details.
- **D** = Destroyed.

The number following the letter code indicates the period (in years) after which records may be destroyed, and is the minimum retention period required by best practice or legislation. It assumes a new file is opened at the start of each academic, calendar or financial year, and is always calculated from the date of the last record in the file.

<table>
<thead>
<tr>
<th>Folder Structure</th>
<th>Examples of Types of Record</th>
<th>Retention Period</th>
<th>Legislative Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINANCIAL SUPPORT/POLICY</strong></td>
<td>Key records documenting the development and establishment of the institution's student financial support policies.</td>
<td>A: Superseded + 5 years Copy to the University Archive after approval for permanent retention.</td>
<td></td>
</tr>
</tbody>
</table>
# Records Retention Schedule for Student Financial Support (2)

## Financial Support /Procedures
- identifying needs for new/revised procedure
- undertaking research
- analysing work processes
- drafting procedure documents
- consulting on procedure documents
- reviewing draft procedure documents in the light of comments received
- trialling procedure
- refining procedure as a result of trials
- submitting final procedure documents for formal approval
- formally approving procedure documents
- disseminating procedure documents
- reviewing procedure.

Master copies of procedures relating to student financial support.

Development of the institution's procedures relating to student financial support.

<table>
<thead>
<tr>
<th>A: Superseded + 5 years</th>
<th>Copy to the University Archive after approval for permanent retention.</th>
</tr>
</thead>
<tbody>
<tr>
<td>D: Issue of procedures + 1 year</td>
<td></td>
</tr>
</tbody>
</table>

## Financial Support /Aid Funds
- providing advice to students about financial aid funds and assisting them to apply for funds
- handling applications for financial aid funds.

Records documenting the provision of financial aid funds to individual students.

| D: Current financial/academic year + 6 years | Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6 |
| D: While prize is awarded | D: Current financial/academic year + 6 years Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6 |

## Financial Support /Bursaries
- providing advice to students about financial aid funds and assisting them to apply for funds
- handling applications for financial aid funds.

Award of bursaries to individual students e.g. Music Scholarships.

| D: Current financial/academic year + 6 years | Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6 |

## Financial Support /Crisis-Hardship Funds
- providing advice to students about financial aid funds and assisting them to apply for funds
- handling applications for financial aid funds.
- providing advice to students about crisis/hardship funds and assisting them to apply for funds
- handling applications for financial aid funds.

Provision of financial aid funds to individual students.

Provision of crisis/hardship payments to individual students.

| D: Current financial/academic year + 6 years | Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6 |
| D: While prize is awarded | D: Current financial/academic year + 6 years Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6 |

## Financial Support /Prizes
- inviting nominations for prizes
- considering nominations received and awarding prizes
- notifying the recipients of prizes; presentation of prizes.

Nominations for prizes, the consideration of nominations and notifications to recipients of prizes.

List of prize winners

| D: Current academic year + 5 years | D: While prize is awarded |
# Records Retention Schedule for Student Financial Support (3)

<table>
<thead>
<tr>
<th>FINANCIAL SUPPORT / SCHOLARSHIPS</th>
<th>Description</th>
<th>Retention Period</th>
<th>Legal Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann Trotman Fund</td>
<td>Award of scholarships and fellowships to individual students.</td>
<td>D: Current financial/academic year + 6 years</td>
<td>Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6</td>
</tr>
<tr>
<td>Fiona Watson Prize/Scholarship</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allen McTernan Fund</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DE: RM: DraftsforPublication: FinancialSupport
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Date created: 8 November 2010