

					v1.0 May 2018
	Academic and Student Affairs Retention Schedule				
	Description of Records	Retention Trigger and Retention Period	Disposal Action	Rationale for Retention Period and Disposal Action	Records Owner
	1 Student Registration				
1.1	Records documenting the registration of individual students on programmes	n/a	Retain	On student QSIS record	Student Registry Services
	2 Student Records				
2.1	Records containing personal data on individual students that are held in QSIS	n/a	Retain	On student QSIS record	Student Registry Services
2.2	Name changes that are recorded in QSIS of current students	n/a	Retain	On student QSIS record	Student Registry Services
2.3	Hard copy records relating to the administration of name changes	Termination of relationship with student + 1 year	Destroy	Has to be included in HESA returns	Student Registry Services
2.4	Student files containing correspondence, sickness certificates, file notes of meetings, pastoral care records	Termination of relationship with student + 6 years	Destroy	Limitation Act, 1980	Schools
2.5	Records documenting the handling of individual students' requests for statements of results/transcripts	End of academic year + 1 year	Destroy	JISC Recommendation	Student Registry Services
2.6	Records documenting the handling of requests for confirmation of individual students' awards, attendance or conduct from employers and other educational institutions	End of academic year + 1 year	Destroy	JISC Recommendation	Student Registry Services; Schools
	3 Student Withdrawals/Transfers				
3.1	Records relating to the transfer of individual students to new programmes or to new courses within programmes	Termination of relationship with student + 6 years	Destroy	Limitation Act 1980; a record of the transfer is permanently held on the student's QSIS record	Student Registry Services; Schools
3.2	Records relating to the withdrawal of individual students from the university	Termination of relationship with student + 6 years	Destroy	Limitation Act 1980; a record of withdrawal is permanently held on the student's QSIS record	Student Registry Services; Schools
	Student Assessment				
	4 Postgraduate Research Theses				
4.1	Theses - Doctoral	n/a	Archive	Hard copies retained in University Library; electronic copies may be held in the university's open access online repository, PURE e.g. if mandated by the Research Funder	University Library; Research & Enterprise Directorate
4.2	Theses - other than doctoral	Award of Degree + 1 year	Review		Schools/Academics

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4.3	Records relating to milestones in the research degree process including outcome of differentiation; date of viva and the outcome of the viva	n/a	Retain	On student's QSIS record	Student Registry Services
4.4	Result of thesis	n/a	Retain	On student's QSIS record	Student Registry Services
5 Examinations					
5.1	Module results inputted into QSIS	n/a	Retain	On student's QSIS record	Schools
5.2	Module results amendment forms submitted by Schools to Student Registry	End of examination cycle + 2 years	Destroy	Forms are completed by Schools to amend an examination result recorded in QSIS, a member of Student Registry amends the result in QSIS	Student Registry Services
5.3	Examination Question Papers	n/a	Archive	Historic value	University Archive/Queen's Online
5.4	Records relating to the administration of exams	End of examination cycle + 1 year	Destroy	Includes examination timetables, attendance records, control of examination papers, appointment and training of invigilators, invigilation reports, special arrangements.	Student Registry Services
5.5	Exceptional Circumstances	Graduation/withdrawal/end of student's relationship with university + 6 years	Destroy	JISC recommendation; Limitation Act 1980; Data Protection Act 1998; evidence to support mitigating/exceptional circumstances, includes special circumstances records, NHS fit notes, correspondence provided by students, reports from external bodies e.g. GPs or external counsellors; <b>some details may be recorded on QSIS student record</b>	Student Registry Services; Schools
5.6	Records documenting the collation of examination results and compilation of pass lists and individual notifications of results	End of academic year + 1 year	Destroy		Schools
6 Academic Award Conferment					
6.1	Marks/Grades/Classifications awarded to students	n/a	Retain	On student's QSIS record	Student Registry Services
6.2	Records relating to the graduation of students (from 2008 onwards these are held in QSIS)	n/a	Retain	Longterm historic value	Student Registry Services
6.3	Graduation Booklets	n/a	Retain	Longterm historic value	Student Registry Services; University Archive
6.4	Records documenting the organisation of award ceremonies	Completion of ceremony + 1 year	Destroy	JISC Recommendation	Student Registry Services
6.5	Records documenting the notification of awards to students and the issue of awards certificates	Issue of award + 1 year	Destroy	JISC Recommendation	Student Registry Services

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6.6	Records documenting the mailing of award certificates to students who do not attend ceremonies	Completion of ceremony + 1 year	Destroy	JISC Recommendation	Student Registry Services
7 Student Finance					
7.1	Records relating to individual student finance that are held in QGIS	n/a	Retain	On student QGIS record	Student Finance; Student Registry Services
7.2	Records relating to SLC (Student Loans Company) that are held in QGIS	n/a	Retain	Held in QGIS	Student Registry Services
7.3	Records relating to requests for fee waivers where these records are not held in QGIS	Graduation/termination of relationship with student + 6 years	Destroy	Limitation Act 1980	Student Registry Services
7.4	Records relating to fee waivers held in QGIS	n/a	Retain	On student's QGIS record	Student Registry Services
7.5	Admissions Fees Appeals	End of current year + 7 years	Destroy	For appeals that were dealt with under the Admissions Appeals and Complaints Procedure. This is prior to the existence of the Student Finance Framework that is now in operation and which is dealt with by the Finance Directorate	Director of DASA
8 Scholarships					
8.1	Scholarships and Awards Regulations Handbook pertaining to current University scholarships, prizes and awards	Current year + 6 years	Review	Potential historic/archival value	Scholarships and Awards Group Secretary ( <b>Academic Affairs</b> )
8.2	HEAR (Higher Education Achievement Records) records of academic and extracurricular achievements that are included in a student's QGIS record	n/a	Retain	On student's QGIS record	Student Registry Services
8.3	Records relating to applications and recipients of prizes including completed application forms, entries in a database on scholarship applications and outcome letters	End of academic year + 6 years unless a shorter retention period is stipulated for applications. There are some records relating to prizes/awards granted to students held on QGIS.	Destroy	Data Protection Act 1998; Freedom of Information Act 2000; Limitation Act 1980	Scholarships and Awards Group Secretary ( <b>Academic Affairs</b> ). All records held in QGIS are retained.
8.4	List of all prize/scholarship/bursary recipients across the University	n/a	Archive	JISC Recommendation; historic/research value	University Archive
8.5	Records relating to Scholarship fund administration including travel reports	End of current financial year + 6 years (round up to 7 years)	Destroy	Limitation Act, 1980	Scholarships and Awards Group Secretary ( <b>Academic Affairs</b> )
8.6	A Level Entrance Competition Scholarship applications - summary spreadsheet	End of academic year + 6 years unless a shorter retention period is stipulated for applications	Delete		Scholarships and Awards Group Secretary ( <b>Academic Affairs</b> )
8.7	Scholarship Payment Requests	End of financial year + 6 years	Destroy		Academic Affairs
8.8	Scholarship Payment Database	End of financial year + 6 years	Destroy		Academic Affairs

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9	Student Discipline/Academic Offences/Fitness to Practice records held in Schools and equivalent				
9.1	Records relating to discipline cases dealt with by a Disciplinary Officer that do not progress to a Committee of Discipline	Last action on the case + 6 years if a student does not graduate or Graduation + 1 year	Destroy		Schools; Community Engagement; Queen's Accommodation; University Library
9.2	Records relating to Academic Offences that do not progress to the Academic Offences Committee	Last action on the case + 6 years if a student does not graduate or Graduation + 1 year	Destroy		Schools
9.3	Records relating to Disciplinary Cases and Academic Offences in 9.1 & 9.2 above - <b>medical students</b>	Last action on case + 6 years or within 6 months of completion of Foundation Year One (whichever is longer)	Destroy		School of Medicine, Dentistry and Biomedical Sciences
9.4	Records relating to Fitness to Practice cases	Termination of relationship with the student + 6 years; see retention periods recorded in the 'Safeguarding Children and Vulnerable Adults Policy and Guidance Privacy Note' on the University's Safeguarding webpage	Destroy	Limitations Act 1980	Schools
9.5	Records relating to Regulated Activity	See retention periods recorded in the 'Safeguarding Children and Vulnerable Adults Policy and Guidance Privacy Note' on the University's Safeguarding webpage			
10	Student Discipline/Appeals/Complaints records held by Academic and Student Affairs				
10.1	Records relating to complaints cases dealt with by NIPSO (Northern Ireland Public Services Ombudsman); student appeals; Stage 2 complaints from students; other student complaints; academic offences, all dealt with by Academic Affairs	End of academic year in which Committee met + 10 years	Destroy	Data Protection Act 1998; Limitation Act, 1980	Appeals & Complaints lead Administrator within Academic Affairs
10.2	Records relating to discipline cases that are in QSIS	n/a	Retain	In some discipline cases there are records in QSIS	Student Registry Services
10.3	Records relating to complaints cases dealt with by NIPSO (Northern Ireland Public Services Ombudsman); Student appeals; Stage 2 complaints from students; other student complaints; Academic Offences cases; student discipline which are all dealt with by Academic Affairs and copies are held by the Office of the Director of DASA	Last action on case + 10 years	Destroy	All paperwork is held by Academic Affairs	Academic Affairs
10.4	Fitness to Practice cases - Schools seeking permission to proceed with the FtP procedure from the Director of Academic and Student Affairs	Last action on case + 6 years	Destroy	Limitation Act 1980	PA to DASA Director
10.5	Personal and Sensitive Appeals to the Director of Academic and Student Affairs - paperwork	Last action on case + 6 years; retain outcome letter and form	Destroy	Limitation Act 1980	PA to DASA Director
10.6	Personal and Sensitive Appeals to the Director of Academic and Student Affairs - Database	Last action on case + 6 years	Delete	Limitation Act 1980	PA to DASA Director
10.7	Admissions Appeals (Stage 2 to the Director of Academic and Student Affairs)	Outcome of Stage 2 appeal + 1 year	Destroy	Limitation Act 1980	PA to DASA Director

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11	Concessions				
11.1	Records relating to requests for concessions to the General Regulations which may relate to an individual student or a student cohort	Current academic year + 6 years			Academic Affairs
11.2	Records relating to concession requests to the Programme regulations which may relate to an individual student or a student cohort	Current academic year + 6 years			Academic Affairs
11.3	Database which records all PGR concessions	Current academic year + 6 years			Academic Affairs
12	Disability and Wellbeing Administration				
12.1	Student files, student database records and other records containing student information that are held by the Disability and Wellbeing Service	Graduation/termination of student relationship - records are moved into an archive database for 1 year; a disposal record is kept of the student number, the date any records were archived and the date of records disposal	Destroy	Limitation Act 1980; records are held longer if a student has made a complaint against the Disability and Wellbeing Service	Disability and Wellbeing service
12.2	Student Assessment and Admission Database	End of academic year + 1 year	Review to ensure accuracy	Database used to record all students who have a disability and details regarding their agreed support	Disability and Wellbeing service
12.3	Referrals for one-to-one support for students	Graduation/withdrawal + 1 year	Destroy	Referrals requesting support for individual students	Disability and Wellbeing service
12.4	ISSAs (Individual Student Support Agreements)	End of academic year + 1 year		ISSAs detail registered disability, agreed support and signed declaration	Disability and Wellbeing service
12.5	Student Needs Assessment	Graduation/withdrawal + 7 years	Destroy	Student referrals, medical evidence, signed declarations, DSA (Disability Support Allowance) approval	Disability and Wellbeing service
12.6	DSA (Disability Support Allowance) Eligibility	n/a	Retain	On student's QSiS record	Disability and Wellbeing service; Student Registry
12.7	Student Matchups - matchup documents for support providers to provide agreed support for students	Graduation/withdrawal + 1 year	Destroy		Disability and Wellbeing service
12.8	Student Surveys	End of academic year	Destroy		Disability and Wellbeing service
12.9	Complaints to Disability Services	Resolution of complaint/last action on the case + 10 years	Destroy		Disability and Wellbeing service
13	Student Counselling Service				
13.1	GOS records (created by Inspire, a third party provider of counselling services to QUB) relating to Student Counselling Services including client files, session monitoring and management reports, monthly activity monitoring and weekly 'At Risk' reports	Retained for 8 years	Consider for disposal	All GOS records are monitored, maintained and disposed in line with Inspire's Data Retention and Disposal Procedure (held for 8 years, reviewed and considered for disposal. A disposal log is maintained).	Inspire Students Wellbeing Service
14	Records relating to the Register of Support Providers				
14.1	Support Provider Folders	Withdrawal of Support Provider from the Register + 1 year	Destroy	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager
14.2	Unsuccessful Support Provider Applications Forms	Interview + 1 year	Destroy	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager

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14.3	Interview Schedules/Letters	End of recruitment process + 1 year	Review	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager
14.4	Access NI Spreadsheet Entries	Remove details of the Support Provider after completion of contract or removal from Register	Destroy	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager
14.5	Works Records	End of academic year + 3 years	Dispose	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager
14.6	Referral spreadsheet	End of academic year + 4 years	Dispose	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager
14.7	Register referrals	End of academic year + 3 years	Dispose	Data Protection Act 1998; Freedom of Information Act, 2000; Best practice	Register Manager
15	Needs Assessment Centre				
15.1	Needs Assessments Reports and Reviews	Date of Disabled Students Allowance confirmation + 3 years - review. Graduation + 7 years dispose in line with Service Archive Process.	Review after 3 years of the date of Disabled Student Allowance confirmation and dispose graduation + 7 years	QUB has a Service Level Agreement with the Department for the Economy to run the Needs Assessment Centre	Needs Assessment Manager
15.2	AccessNI applications and Annual Self-Declarations	Review annually from date of recruitment until end of contract	Dispose	QUB has a Service Level Agreement with the Department for the Economy to run the Needs Assessment Centre	Needs Assessment Manager
15.3	Recruitment information regarding Freelance Needs Assessors	Retain for duration of contract	Dispose	QUB has a Service Level Agreement with the Department for the Economy to run the Needs Assessment Centre	Needs Assessment Manager
16	International Student Support				
16.1	Immigration Strategy and Policy Documents, includes any development input	Current year + 6	Review	JISC Recommendation	International Student Support
16.2	Student Case Files	Termination of student relationship + 6 years	Destroy	JISC Recommendation	International Student Support
16.3	Student Attendance monitoring	Termination of student relationship + 6 years	Destroy	JISC Recommendation	International Student Support
16.4	CAS - Certificates of Acceptance of Study	Termination of student relationship + 6 years	Destroy	JISC Recommendation - part of student case file	International Student Support
16.5	BRP Cards (Biometric Residence Permits)	Held until collected by student		Student documents - no business need to hold	International Student Support
16.6	PBS Database of visa applications (information downloaded from UKVI SMS system)	End of academic year	Destroy		International Student Support
16.7	CAS Database (information downloaded from UKVI SMS system)	End of academic year	Update		International Student Support
16.8	US Federal Loans Case files	Termination of student relationship + 6 years	Destroy	TBC	International Student Support
16.9	International Student Events	Current year +1	Review and dispose	JISC Recommendation	International Student Support

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	<b>1 Programme Management</b>				
1.1	Records documenting the design, development, amendment, and withdrawal of modules within taught and/or research degree programmes giving module specifications and assessments including collaborative arrangements	Life of Programme and/or collaborative partnership + 6 years	Review	Potential Archival/Historical value	Schools; Academic Affairs - Courses and Regulations Group, the Group Secretary retains minutes of decisions
1.2	Module descriptions and specifications as published in QSIS	n/a	Retain	Module description to be retained permanently as needed to provide student transcripts and for historic record	Student Registry Services
1.3	Records documenting the process of obtaining approval, renewal, withdrawal and/or accreditation for (modules of) taught and/or research degree programmes from professional, statutory or other accreditation bodies (including collaborative arrangements)	End of Life of the Programme and/or collaborative partnership + 6 years	Review; accreditation reports are archived	Potential Archival/Historical value (e.g. significant partnerships)	Schools; Academic Affairs - Courses and Regulations Group, the Group Secretary retains minutes of decisions
1.4	Programme Management Forms submitted by Schools detailing new programmes/modules; amendments to existing programmes/modules; or withdrawal of programmes/modules; PEM (Programme Evaluation Meeting) Reports; Approval to Proceed Forms; Validation Reports for Collaborative Programmes	End of Life of the Programme + 6 years	Review	Any information recorded in QSIS is permanently retained	CRG (Courses and Regulations Group) Secretary (Academic Affairs) and CPG (Collaborative Provision Group) Secretary (Academic Affairs)
1.5	Student Handbooks - under/post graduate	Superceded + 6 years	Review	To ensure information is available in the event of a dispute or complaint made by a student; handbooks may contain Health and Safety Information; Limitation Act 1980	Schools
	<b>2 Taught Programme Delivery</b>				
2.1	Records documenting the preparation of teaching and learning materials	End of academic year + 1 year	Review	JISC Recommendation; to ensure currency; examples include lecture notes, course handouts, workshop/seminar documents	Schools/QOL
2.2	Records documenting the planning and conduct of teaching and learning events	End of academic year + 1 year	Review	JISC Recommendation; to ensure currency; examples include lecture notes, course handouts, workshop/seminar documents	Schools/QOL

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<b>3 Examiners</b>					
3.1	Records documenting the selection and appointment of internal and external examiners and independent chairs including the design and delivery of training <b>for Undergraduate and Postgraduate Taught courses</b>	End of appointment + 6 years	Destroy		UG/PGT Administrator <b>(Academic Affairs)</b>
3.2	Records documenting the selection and appointment of internal and external examiners and independent chairs including the design and delivery of training <b>for Postgraduate Research courses</b>	End of academic year + 6 years	Destroy	Best practice	PGR Administrator <b>(Academic Affairs)</b>
3.3	Names of External Examiners appointed for <b>Postgraduate Research students that are recorded on QSIS</b>	n/a	Retain	On student's QSIS record	Student Registry Services
3.4	External Examiner reports - Undergraduate and Postgraduate Taught	End of assessment + 6 years	Review	Limitation Act 1980; Data Protection Act, 1998	UG/PGT (Undergraduate/Post-graduate taught) Administrator <b>(Academic Affairs)</b>
3.5	External Examiner reports - Postgraduate Research	n/a	Retain	On student's QSIS record	Student Registry Services; Schools
3.6	Copies of School responses to External Examiner Reports	End of assessment + 6 years	Review		Schools and Academic Affairs
3.7	External Examiner fees and expenses	End of current financial year + 6 years	Destroy	Taxes Management Act 1970	Student Registry Services
<b>4 Taught Student Assessment</b>					
4.1	Records documenting the design and development of assessments	Life of the programme	Destroy	JISC Recommendation	Schools
<b>5 Collaborative Provision</b>					
5.1	Memorandums of Agreement/ Understanding (Institutional agreement with collaborative partners setting out the terms upon which each institution will work together to deliver a particular programme to students)	End of agreement + 12 years	Review	May hold historic/archive value - business purpose	CPG (Collaborative Provision Group)



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5.2	Collaborative Research Degree Programme Student Agreement outlining the details of the students research and supervision arrangements	End of agreement + 12 years	Review	May hold historic/archive value	CPG (Collaborative Provision Group)
5.3	Collaborative Provision Register containing details of all collaborative agreements	n/a	Review	Collaborative Provision Register is updated on an ongoing basis	CPG (Collaborative Provision Group)
5.4	Recognised Teacher Application Forms and Assessors Reports (form used by schools and colleges and partner institutions to apply for recognised teacher status)	End of role + 1 year	Destroy		CPG (Collaborative Provision Group)
5.5	Recognised Teacher Database	End of academic year	Review	Ensure it is up-to-date	CPG (Collaborative Provision Group)
<b>6 Honorary Titles, Visiting Research Title</b>					
6.1	Records relating to Visiting Research Titles including nomination forms (form used by Schools to nominate a person for a visiting research title); copy of appointment letters; CVs; references	End of role + 1 year	Destroy		HTG (Honorary Titles Group) Secretary (Academic Affairs)
6.2	Records relating to Honorary Titles including nomination forms (form used by Schools to nominate a person for an Honorary title) copy of appointment letters; CVs, references	End of role + 1 year	Destroy		HTG (Honorary Titles Group) Secretary (Academic Affairs)
6.3	Database used to record people who held Visiting Research Titles and Honorary Titles	End of role + 1 year	Destroy		HTG (Honorary Titles Group) Secretary (Academic Affairs)
<b>7 Timetables</b>					
7.1	University Timetables, generation of class lists and tutorial groups, class attendance lists	End of academic year + number of years of degree course e.g. BA, BSc + 3 years; BDS + 5 years; MB + 6 years	Destroy		Schools; Timetabling Service
7.2	University Timetables, generation of class lists and tutorial groups, class attendance lists held in QSIS	n/a	Retain		Student Registry Services

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<b>1</b>	<b>Strategic Planning and Policy Development</b>				
1.1	DASA Strategy and Policy Documents	n/a	Archive	Potential historic/research value	Academic Affairs
1.2	Procedures of Academic and Student Affairs that include dealing with Academic Offences, Fitness to Practice, Students Complaints	Superceded + 6 years	Review	Potential historic/research value	Academic Affairs
1.3	Records relating to the assessment of the impact of policies/procedures	Superceded + 6 years	Review		Academic Affairs
1.4	Notification of student fatalities to stakeholders under the University's Protocol	End of current year + 1 year	Destroy		PA to DASA Director
	<b>Quality Review</b>				
<b>2</b>	<b>External Quality Review</b>				
2.1	Records relating to the management of quality reviews carried out by external bodies e.g. QAA: key documents	n/a	Archive	To preserve evidence of quality and validity of courses	Academic Affairs
2.2	Records relating to the management of quality reviews carried out by external bodies e.g. QAA: working papers	Completion of audit + 6 years	Review	To ensure paperwork is available for conduct of next audit	Academic Affairs
2.3	Higher Education Review Self-Evaluation Forms - submitted for Higher Education Review	Completion of audit + 6 years	Destroy		Academic Affairs
2.4	Responses to Consultations - external and internal	Date of response + 6 years	Review	Potential historic/research value	Academic Affairs
2.5	Performance monitoring and analysis records including records documenting benchmarking exercises with other comparable institutions	End of current year + 1 year	Review		Relevant secretary/administrator in Academic Affairs; PA to Director

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2.6	Records relating to Collaborative Periodic Reviews and validations undertaken within partner institutions	Completion of next review/validation	Destroy		CPG (Courses and Regulations Group)/RPC (Research and Postgraduate Committee)
3 Internal Quality Review					
3.1	Audit and review records relating to strategic planning and performance management including the conduct, data, results, analyses, responses and action taken to address issues raised	End of current academic year + 6 years	Review		Relevant secretary/administrator in Academic Affairs; PA to Director
3.2	Records assessing the impact of policies and procedures	Superseded + 6 years	Review		Academic Affairs
3.3	Records relating to Annual Programme Reviews undertaken for each academic programme - taught and research	End of Annual Programme Review + 6 years	Review		Academic Affairs - Quality Review
3.4	Records relating to the follow-up to Programme Reviews	End of Programme Review + 6 years	Review		Academic Affairs - Quality Review
3.5	Records relating to the Periodic Review and Enhancement Process (PREP) undertaken within Schools	Completion of next PREP	Destroy	Records include School Reflective Statement, Panel Report and School Action Plan	CRG (Courses and Regulations Group)
3.6	Teaching standards and quality review and audit records - internal and external	End of academic year + 6 years*	Review	Internal and external Audits; *unless a longer retention schedule is required by professional bodies	Secretaries to PGR and UG/PGT review processes
4 Accreditation/Validation					
4.1	Accreditation/Validation by Professional, Statutory or Regulatory Bodies (PSRBs) - Final reports	n/a	Archive	To preserve evidence of quality and professional recognition of courses	University Archive

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4.2	Accreditation/Validation by Professional, Statutory, Regulatory Bodies - papers submitted to Academic Affairs by Schools that obtained accreditation	Completion of next audit/review + 6 years	Review		Academic Affairs
5	Publications				
5.1	Publications including record of website content, General Regulations, Student Charter and any other public information	Publication date + 10 years	Review	May hold archival/historical value	Academic Affairs
5.2	Records relating to the commissioning, design, editing and production of publications	Publication date + 1 year	Review	May have administrative value in regard to the production of further publications	Academic Affairs