

Student Records Retention Schedule

Ref	Record	Activity	Owner of the "golden copy"	Retention period	Disposition	Start of retention period
	Student Systems					
	Student Name, title, gender	To identify you as an individual when at or interacting with the University	Student Systems	In perpetuity	Archive	completion of studies
	Student Photographs	To identify you as an individual when at or interacting with the University	Card Services	2 years	destroy	completion of studies
	Student term time contact details	To enable contact when required	Student Systems	Duration of study	Owner ship transferred	completion of studies
	Alumni contact details	To enable contact when required	Alumni and Development	in perpetuity	Actitly maintained for life long relationship	n/a
	Alumni information	To confirm your identity when required and used to contact you after graduation	Alumni and Development	in perpetuity	Archive	n/a
	Records regarding programme of study, mode of study, method of study, course enrolments, periods of matriculation and absence	To deliver learning and teaching and the many services provided by the University to support students listed in this document	Student Systems and schools (course work)	10 years	destroy	completion of studies
	Course work	To deliver teaching and assess students	Schools	10 years	destroy	completion of studies

Student Records Retention Schedule

Explanation of retention period		
student data is held in perpetuity to verify the degrees awarded by the University.		
Photos are destroyed when on campus identification is no longer necessary		
D&A become owners of this data post student completion		
Alumni can opt out and request their contact data be deleted		
Alumni will always be identifiable for the purpose of verifying the degrees		
After retention period with no contact from student, the record is reduced and core record is archived, all supporting data now without value is destroyed as part of this process.		
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	Higher Education Achievement Report (HEAR)	To provide a single comprehensive record of students' achievements; this includes course marks, awards and prizes, awarded degrees and classifications	Student Systems	in perpetuity	archive	n/a
	Student representation	To facilitate communication between Student Representatives and the students they represent and to be invited to take part in voluntary and paid opportunities to support student recruitment and widening participation	School, course organiser	defined per specific activity	archive	n/a
	Concessions	To enable concessions to be permitted against various University regulations to an individual student's benefit.	Extensions and Special Circumstances, School/College	1 year	destroy	completion of studies
	Personal tutor notes	To support students throughout their time at the University, provide academic support	School	5 years	destroy	completion of studies

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Explanation of retention period		
This is European standard for sharing student course marks and awards, replacing the 'student transcript' and will be held as a record of student achievement, and is required to demonstrate the validity of the Universities award degrees.		
as students volunteer to represent the University, they must be made aware of the data protection arrangements of that activity.		
Once a concession has been agreed and authorised, any supporting evidence can be destroyed.		
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	PG Research review records	To annually review progress of postgraduate research students	School	7 years	destroy	completion of studies
	Graduation schedule	Registering for graduation	Student Systems	1 year	destroy	completion of studies
	Graduation publications	To record and publish graduation information	Student Systems	in perpetuity	archive	n/a
	Timetabling	To timetable classes and exams	Student Systems	1 year	destroy	completion of studies
	Academic progress record incl. formal action to deal with unsatisfactory progress, transfer to new programmes or to new courses within programmes, withdrawal from the institution, and the termination of individual students' programmes	To administer student progress	Schools	6 years	destroy	completion of studies
	Library information	To allow students to make use of the library services	Library	2 years	destroy	completion of studies

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Explanation of retention period		
After retention period with no contact from student, the record is reduced and core record is archived, all supporting data now without value is destroyed as part of this process.		
Once graduation ceremony has passed all data is no longer required and can be destroyed		
Students are given opportunities to opt out when the list of graduadan is shared externally for publication.		
After retention period with no contact from student, the record is reduced and core record is archived, all supporting data now without value is destroyed as part of this process.		
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	Virtual Learning information	To allow staff and students to interact in support of their studies by providing a communications forums, document sharing and submitting assessments.	Schools	Live data from student record; data not locally retained.	n/a	completion of studies
	Immigration information	To provide Tier 4 visa sponsorship to remain in the UK	Student Systems (Immigration service)	10 years for students, 1 year for unsuccessful applicants.	destroy	completion of studies
	Fee records	To determine and process fee status	Student Systems (Immigration service)	7 years	destroy	completion of studies
	Student funding records	To process funding applications	Student Systems (Student Funding team)	Successful applications - 7 years Unsuccessful applications – 1 year	destroy	completion of studies
	Scholarship applications and resulting documents	to process and manage scholarships	Student Systems (Scholarships service)	Successful applications - 7 years Unsuccessful applications – 1 year	destroy	completion of studies
D&A						
	Register of General Council members	A list of graduate members, and current staff and University court members	D&A	In perpetuity	n/a	creation of record

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Explanation of retention period		
After retention period with no contact from student, the record is reduced and core record is archived, all supporting data now without value is destroyed as part of this process.		
Legal requirement		
Legal requirement		
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Legal requirement		
Universities Scotland Act		

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	Alumni records	A list of University of Edinburgh alumni and associated information	D&A	In perpetuity	n/a	creation of record
	Donor records	A list of University of Edinburgh donors and associated information	D&A	In perpetuity	n/a	creation of record
	Potential and current supporters and other individuals and stakeholders	A list of individuals, stakeholders, current and potential supporters relevant to the University and associated information	D&A	In perpetuity	n/a	creation of record
	Wealth assessment of donors and potential supporters	Classification of overall wealth and capacity and likelihood to support the University	D&A	5 years	destroy	creation of record
	Due diligence assessment	Risk assessment of accepting donations on behalf of the University	D&A	In perpetuity	n/a	creation of record

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Explanation of retention period		
Allows alumni to access services to which they are entitled to use; provide alumni with relevant and timely information; needed for historical reporting purposes		
Provide donors with relevant and timely information; needed for historical reporting purposes		
Provide individuals with relevant and timely information; needed for historical reporting purposes		
Needed so requests for support are appropriate and relevant and resources are used effectively		
n/a		

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Ref	Record	Activity	Owner of the "golden copy"	Retention period	Disposition	Start of retention period
	Event attendees	Record of dietary or accessibility requirements when attending an event	D&A	duration of event	duration of event	creation of record
Academic Services						
Student academic appeals						
	All records generated by appeal process	Student academic appeals: cases	Associate Dean (College Office), Academic Services	5 years	Destroy	
Student conduct cases						
	All case and appeal records	Administration relating to conduct and academic misconduct cases	Schools and Colleges and Academic Services	5 years	Destroy	
	Correspondence, evidence, notes of meetings, record of outcome of cases	Administration relating to conduct cases dealt with by Centre for Sport and Exercise	Centre for Sport and Exercise	1 year	Destroy	
	Correspondence, evidence, notes of meetings, record of outcome of cases	Administration relating to conduct cases dealt with by Accommodation, Catering and Events	Accommodation, Catering and Events	1 year	Destroy	
	All case records where the student is permanently excluded from the University	Administration relating to conduct cases that go to the Student Discipline Committee whereby the student is immediately permanently excluded from the University with no eligibility for re-admittance to the University on any course or degree programme	Academic Services	in perpetuity	Retain	

Student Records Retention Schedule

Explanation of retention period		
Needed for historical reporting purposes		
Allows time to resolve any issues or queries		
May have a bearing on later years of study; retention for 1 year after graduation allows time to resolve any issues and queries		
Retain as the student is not eligible for re-admittance to the University on any course or degree programme		

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Ref	Record	Activity	Owner of the "golden copy"	Retention period	Disposition	Start of retention period
	Record of i) date of disclosure and ii) the nature of the charge or conviction and iii) that a decision was taken not to investigate under the Code of Student Conduct	Administering a disclosure from a student relating to a criminal charge or conviction which the University decides does not represent a breach of the Code of Student Conduct	Academic Services	5 years	Destroy	
		Student complaints				
	All relevant records	Informal and formal complaints	Relevant member of staff or investigation lead	5 years	Destroy	
	Minutes and papers of Special Circumstances Committee	Special circumstances	Secretary to the relevant Special Circumstances Committee.	5 years	Destroy	
		Student Accommodation				
	electronic queries from prospective tenants, and replies	Email and Live chat enquiries	Accommodation, Catering and Events	1 year	Destroy	after creation
	online application form	Accommodation Application for accommodation	Accommodation, Catering and Events	3 years + current year	Destroy	after receipt
	Accommodation Contract offered and accepted	Accommodation Offer/Acceptance	Accommodation, Catering and Events	1 year	Destroy	after receipt
	Medical or disability information from student	Medical Appeal for specific accommodation	Accommodation, Catering and Events	1 year post graduation	Destroy	after student moves out of accommodation
	Bank Introductory Letter	Bank Introduction Letter	Accommodation, Catering and Events	3 years + current year	Destroy	completion of studies
	Communication to student	Student Communication	Accommodation, Catering and Events	3 years + current year	Destroy	after creation
	All records relating to the appeal, including notice of appeal, outcome letter and committee minutes.	Administering allocation appeals	Accommodation, Catering and Events	6 months	Destroy	after conclusion of appeal

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Explanation of retention period		
Allows time to resolve any issues or queries		
Can be useful for precedent purposes		
Allows time for follow up queries or to resolve queries or issues.		
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Allows time to resolve any follow up queries		
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Allows time to resolve queries or issues.		

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Ref	Record	Activity	Owner of the "golden copy"	Retention period	Disposition	Start of retention period
	Electronic Transfer request	Administer transfer requests	Accommodation, Catering and Events	3 years + current year	Destroy	after student moves out of accommodation
	Withdrawal request from student	Student Withdrawal from University	Accommodation, Catering and Events	1 year	Destroy	after student moves out of accommodation
	All incidents recorded electronically on incident tracker by the Community Support Team (emailed reports by the Central security team are sometimes received) these are also recorded on incident tracker	Recording security incidents	Community Support Team	2 years + current year	Delete	start of new financial year
	Report investigating is carried out by the Community Support Managers, in conjunction with Reslife Team and Central Security Team	Investigating security incidents	Community Support Team	2 years + current year	Delete	start of new financial year
	Electronic application to stay in ACE accommodation.	PG Accommodation Renewal Request	Accommodation, Catering and Events	3 years + current year	Destroy	after creation
	Application to enable UG students to stay in current accommodation	UG Accommodation Renewal Requests	Accommodation, Catering and Events	3 years + current year	Destroy	after creation
Careers support						
	All records related to careers advice and guidance counselling	Careers advice	Careers Service	Students: duration of study Graduates: 5 years after leaving the University	Destroy	at end of academic year following the last contact
	registration form for individual workshops	Careers workshops	Careers Service	Students: duration of study Graduates: 5 years after leaving the University	Destroy	at end of session

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Explanation of retention period		
Allows time to resolve queries or issues.		
Allows time to resolve queries or issues.		
Allows time to resolve queries or issues and statistical reporting.		
Allows time to resolve queries or issues and statistical reporting.		
Allows time for follow up queries or to resolve queries or issues.		
Allows time for follow up queries or to resolve queries or issues.		
Allows some time for contact to be revived.		
No longer needed.		

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	student request for a reference and letter of reference	Giving references	Relevant staff member	6 months	Destroy	after creation
	Student Counselling and Disability Support					
		Disability support				
	All records relating to organisation of disability support for students	Organising disability support for individual students	The creator of the record.	5 years after graduation	Destroy	after graduation, withdrawal or other permanent departure from University, or, in the case of lapsed students, 4 years after last contact
		Counselling students				
	All records relating to counselling students	Counselling students	Counselling Services	5 years		after creation
		Providing informal pastoral care				
	Pastoral-themed correspondence between students and Director of Studies/supervisors/lecturers/tutors/course organisers/Accommodation offices/Centre for Open Learning student advisers/potentially any staff-member anywhere in the University.	Providing informal pastoral care	Relevant staff member	One year	Destroy	after graduation, withdrawal or other permanent departure from University, or, in the case of lapsed students, 4 years after last contact
	Letter concerning student's bona fides	Vouching for student's bona fides, e.g. visa application, council tax certificates, matriculation certificates, banks	See creator of record	1 year	Destroy	After creation
	Information Services					
	Card Services and Apps					

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Explanation of retention period		
Allows time for follow up requests. After 5 years a reference is unlikely to be still relevant.		
Allows time to resolve queries or issues.		
required by professional counselling body		
Allows time to resolve queries or issues. For Centre for Open Learning, allow one year more than maximum time available to student to complete certificate.		
Allows time to resolve any issues or queries		

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Ref	Record	Activity	Owner of the "golden copy"	Retention period	Disposition	Start of retention period
	Administering University card	University card database	University Card Services	Destroy	15 months after card expires	after graduation, withdrawal or other permanent departure from University.
	Allocating small project grant	Entry in database/spreadsheet recording whether received a grant or was declined	Alumni Services	Destroy	20 years	after decision taken
ICT security						
	Creating user names, login passwords and e-mail accounts	Paper registration forms (being phased out)	IT Infrastructure Division	Destroy	1 year	after receipt
	Creating user names, login passwords and e-mail accounts	Auditable log of activity within the Identity Management Service	IT Infrastructure Division	Destroy	1 year	after creation
	Creating user names, login passwords and e-mail accounts	Entry in student database recording personal e-mail address	Student Systems	Destroy	1 year	after graduation, withdrawal or other permanent departure from University, or, in the case of lapsed students, 3 years after last contact
	Providing ICT services across networks	Audit and exception files produced during network and e-mail use (these include matriculation number but not names or other details)	IT Infrastructure Division	Destroy	1 year	after creation
	Providing ICT services across networks	History files produced during network and e-mail use (these include names)	IT Infrastructure Division	Destroy	1 year	after creation
	Providing ICT services across networks	Usage reports	IT Infrastructure Division	Destroy	4 years	after creation

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Explanation of retention period		
GDPR		
No longer needed.		
Allows time to resolve queries or issues.		
Based on Home Office Voluntary Code of Practice on Data Retention		
Allows time to resolve queries or issues.		
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	Providing ICT services across networks	Network traffic logs (usually do not have student identity with the exception of the dial-up, wireless, and VPN Gateway log which records in student logs in for out)	IT Infrastructure Division	Destroy	6 months	after creation
	Maintaining network security	Report of network traffic information	IT Infrastructure Division	Destroy	6 months	after creation
	Maintaining network security	IT security problem report (private area of the Call Management System)	IT Infrastructure Division	Destroy	2 years	after creation
	Maintaining network security	Security analysis report	IT Infrastructure Division	Destroy	5 years	after creation
	Maintaining network security	Database recording equipment which regularly causes difficulty on the network, recording details of users	IT Infrastructure Division: Science Support Team	Destroy	1 year	after last incident
	Withdrawing login and email access	E-mail still in account after grace period has elapsed (150 days)	IT Infrastructure Division	Destroy		at end of grace period
	Withdrawing login and email access	User ID, email account ID, shared secrets and e-mail directory	IT Infrastructure Division	Destroy	6 months	after account withdrawn
	Providing alumni portal	Form from the alumni asking to register for this service	Development and Alumni Services	Destroy	6 months	after account set up
	Providing alumni portal	History files produced during messaging service use (these include names and "full detail records.")	Development and Alumni Services	Destroy	6 months	after creation
	ICT User Support					

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Explanation of retention period		
Based on Home Office Voluntary Code of Practice on Data Retention		
Based on Home Office Voluntary Code of Practice on Data Retention		
No longer needed		
No longer needed		
Data Protection Act 1998		
Data Protection Act 1998		
Allows time to resolve queries or issues.		
Based on Home Office Voluntary Code of Practice on Data Retention		

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	Preparing the user support system (IT Infrastructure Division Call Management System)	Named entry in Call Management System with e-mail address and preferred method of contact: no calls logged	IT User Services Division	Destroy	6 months	after graduation, withdrawal or other permanent departure from University, or, in the case of lapsed students, 3 years after last contact
	Providing user support	Entries in Call Management System giving details of student, call and support provided	IT User Services Division	Destroy	2 years	after call logged
Delivering library services						
	Registering students	Patron record	Main Library	Destroy	1 year after graduation	after graduation, withdrawal or other permanent departure from University, or, in the case of lapsed students, 3 years after last contact
	Delivering library services	An archive of the daily data runs that produce library notices to be sent to patron, holding individual information about student transactions	Main Library	Destroy	7 years	after creation
LTW						
	Mandatory Training reporting	A report detailing completion of mandatory training modules Information Security Essentials and Data Protection Training. This specifically relates to handling and processing of this information after it is pulled from LEARN.	Information Security	Destroy	1 years after leaving university	Information currently set to drop off after 1 year, with high level reports (non PII) pulled and archived separately.

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Explanation of retention period		
No longer needed.		
Allows time to resolve queries or issues.		
Allows time to resolve queries or issues.		
Information may be needed for debt recovery.		
Allows time for users to be removed from AD, which is used to populate the data.		