



STUDENT RECRUITMENT AND ADMISSIONS (GENERAL) INCLUDING INTERNATIONAL  
RETENTION SCHEDULE

JULY 2010 – UPDATED INTERNATIONAL JULY 2012

## STUDENT RECRUITMENT AND ADMISSIONS (GENERAL)

### ACTIVITY AREAS

|   |                        |    |
|---|------------------------|----|
| 1 | Departmental Committee | 7  |
| 2 | Finance                | 8  |
| 3 | Health Safety          | 9  |
| 4 | Human Resources        | 10 |
| 5 | International          | 11 |
| 6 |                        |    |

| <u>Activity Area</u>    | <u>Name of record</u>                        | <u>To Records store</u>               | <u>Suggested retention period</u>   | <u>Method of disposal</u>  | <u>Authorised by:</u> |
|-------------------------|--|---------------------------------------|---|--|-----------------------|
|                         |  | <b>(Inactive Period)</b>              |   | <b>(Archive\Shred)</b>   |                       |
| Departmental Committees | Minutes\Agendas\Papers                       | When no longer required for reference | Current year + 3 years<br>Clerk's copy of confirmed Minute, Agenda and papers.<br>ALL other copies current academic year + 1 year maximum | Shredded   | Director              |
| Finance                 | AV Form (Completed)                          | N/A                                   | Copy retained by Unit for current year + 2 years  | Top copy sent to Finance Office - carbon copies shredded         | Director              |
| Finance                 | Catering Invoices                            | N/A                                   | Copy retained by Unit for current year + 2 years  | Master copies sent to Finance Office - Duplicate copies shredded | Director              |
| Finance                 | Credit Card receipts and reconciliations     | N/A                                   | Copy retained by Unit for current year + 2 years  | Master copies sent to Finance Office - Duplicate copies shredded | Director              |
| Finance                 | Delivery Notes                               | N/A                                   | Copy retained by Unit for current year + 2 years  | Master copies sent to Finance Office - Duplicate copies shredded | Director              |
| Finance                 | Expenditure Transfer Form (Completed)        | N/A                                   | Copy retained by Unit for current year + 2 years  | Top copy sent to Finance Office - carbon copies shredded         | Director              |
| Finance                 | Expenses Claim Form (completed) and receipts | N/A                                   | Copy retained by Unit for current year + 2 years  | Master copies sent to Finance Office - Duplicate copies shredded | Director              |
| Finance                 | Finance Office Manuals                       | N/A                                   | Retained by Unit for reference until superseded   | Shredded   | Director              |

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|----------------------|--|---|---|--|-----------------------|
|                      |  | <b>(Inactive Period)</b>                      |   | <b>(Archive\Shred)</b>   |                       |
| Finance              | invoice request forms (completed)  | N/A   | Copy retained by Unit for current year + 2 years          | Master copies sent to Finance Office - Duplicate copies shredded           | Director              |
| Finance              | Invoices   | N/A   | Copy retained by Unit for current year + 2 years          | Master copies sent to Finance Office - Duplicate copies shredded           | Director              |
| Finance              | SR&A University budget info - hard copy of spreadsheet with SR&A financial information | N/A   | Retained by Unit for reference for current year + 4 years | Master copy submitted to FO at Planning round<br>Duplicate copies shredded | Director              |
| Finance              | Purchase Order   | N/A   | Copy retained by Unit for current year + 2 years          | Master copies sent to Finance Office - Duplicate copies shredded           | Director              |
| Finance              | Signature Proformas (Internal Finance Process)   | N/A   | Retained until superseded                                 | Master copies sent to Finance Office - Duplicate copies shredded           | Director              |
| Finance              | Univerity budget info - Annual Budget book (copy)                                      | N/A   | Retained by Unit for reference until superseded           | Shredded   | Director              |
| Finance              | Various statistical documentation to monitor the income expenditure of Unit budgets    | When no longer required for routine reference | Current Financial year + 4 years                          | Confidential Waste   | Director              |

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|------------------------------|--|---|---|--|-----------------------|
|                              |  | <b>(Inactive Period)</b>                      |   | <b>(Archive\Shred)</b>   |                       |
| Finance                      | Virement Forms (completed)   | N/A   | Copy retained by Unit for current year + 2 years                          | Master copies sent to Finance Office - Duplicate copies shredded | Director              |
| Health&Safety/Risk/Insurance | Organisational Unit's Business Continuity Plan   | N/A   | Master copy Superseded + 1 year Duplicate copies when superseded          | Shredded   | Director              |
| Health&Safety/Risk/Insurance | Organisational Unit's Health & Safety/Risk docs  | N/A   | Master copy Superseded + 1 year Duplicate copies when superseded          | Shredded   | Director              |
| Human Resources              | Correspondence with staff\HR concerning maternity leave entitlement                                | N/A   | While current + 2 years   | Master copies forwarded to HR\FO Duplicate copies shredded       | Director              |
| Human Resources              | Holiday Cards  | N/A   | Copy current holiday leave period + 1 year                                | Forwarded card to HR   | Director              |
| Human Resources              | HR issues - grievances\disciplinary matters  | N/A   | End of grievance process + 2 years\End of disciplinary process + 6 months | Master copies transferred to HR Copy documentation shredded      | Director              |
| Human Resources              | Internal Authorisation for Recruitment Documentation - post approval documentation\profiles\advert | N/A   | Current year + 2 years  | Masters forwarded to HR Duplicate copies shredded                | Director              |
| Human Resources              | Staff development - copy of signed PAR forms   | When no longer required for routine reference | Superseded + 5 years  | Confidential Waste   | Director              |
| International                | Agent Files  | After 3 years of inactivity                   | Validity of period of agreement + 3 years in Unit plus 5 years in Records | Shred  | Head of International |

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|----------------------|-----------------------|-------------------------|-----------------------------------|---------------------------|-----------------------|
|                      |                       | (Inactive Period)       |                                   | (Archive\Shred)           |                       |

|               |                       |                             |   |        |                       |
|---------------|-----------------------|-----------------------------|---|--------|-----------------------|
|               |                       |                             | Store   |        |                       |
| International | Exchange Agreements   | After 3 years of inactivity | Validity of period of agreement + 3 years in Unit plus 5 years in Records Store | Shred  | Head of International |
| International | Student Documentation | N/A                         | Validity of period of agreement + 5 years in Unit                               | Shred  | Head of International |
| International | Enquiry database      | N/A - Electronic            | Retain in unit for 2 years  | Delete | Head of International |