

University of British Columbia RECORDS RETENTION SCHEDULE AND DISPOSAL AUTHORITY	Schedule No.: 001-01
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This is a recommendation to (check one): -- Establish retention/disposal schedule	Series Title: Student Financial Aid Dockets
	Office of Primary Responsibility (OPR): Awards and Financial Aid

Purpose and Description of Records: <p>Series comprises the University's record of students who have applied for, and received, financial assistance - either academic merit based funding (eg. awards and scholarships), or financial need based funding (eg. bursaries, loans, work-study, and emergency assistance).</p> <p>Files contain students' applications for financial assistance, to which are attached budget worksheets (outlining the applicants' projected budget for the academic year and providing assessment criteria for staff), parents' financial information, memos to file and other correspondence, assessment forms (completed by staff, outlining the amount of assistance for which the applicant is eligible), and notices of award. In addition, files may also contain transfers of award (from other institutions), tuition fee deferment applications, work-study authorizations, and U.S. College Scholarship Service forms.</p>

Personal Information Bank? -- Yes	Vital Record? -- Yes	Retained by: -- Academic Year
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Retention Period (Years): Office -- Current + 1 yr. Records Centre / Storage -- 0 yrs. Total -- Current + 1 yr.	Final Disposition: -- Destruction
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Retention Instructions: Records are retained while students are enrolled at the University, or are in contact with Awards and Financial Aid. They are then retained for another full year before being destroyed.

Appraisal Rationale:

Records in this series must be retained for at least one year after a student's last registration, or last contact with Awards and Financial Aid, in accordance with the requirements of Section 31 of the British Columbia Freedom of Information and Protection of Privacy (FOIPOP) Act:

"If a public body uses an individual's personal information to make a decision that directly affects the individual, the public body must retain that information for at least one year after using it so that the individual has a reasonable opportunity to obtain access to it".

These can be considered vital records in that they document the University's financial obligations to students requiring financial assistance.

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Revisions: