



FM3100: Financial Management – Student Accounts		
University of British Columbia RECORDS SCHEDULE		Schedule Number: FM3100
Primary Title: Student Accounts		Office of Primary Responsibility (OPR): UBCV: Financial Operations; Enrolment services UBCO: Procurement and Finance Services; Enrolment Services
<p>Records in this series cover the collection and administration of student fees, including tuition, residence, and incidental. These include payment records, promissory notes, collection records, tuition benefit records, related documents and correspondence.</p> <p>Personal information that may be found in this series includes student ID, contact information, payment details, SIN, status at the university, collection records.</p> <p>Note: Once records are loaded and approved in Workday the record holder should destroy the referent records.</p>		
Vital: Yes		PIB: Yes
Authority: BoG Policy GA4: Records Management Records Management Office Digitization Standard		Date Approved: 20220729
Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	Policies and Procedures	EV+5Y, FR EV=Date superseded or obsolete FR=UA will fully retain records from this series
05	General	EV+5Y, D EV=Date superseded or obsolete
10	Accounts	FY+6Y, D SR=UA will selectively retain records from this series
25	Residential Fees	FY+6Y, D
35	Tuition Fees	FY+6Y, D



45	Issues	FY+5Y, D
60	Reports	FY+5Y, SR SR=UA will selectively retain records from this series
Acronym Key. AY = Academic Year; CY=Calendar Year; D=Destroy; EV=Event; FY=Fiscal Year; FR=Full Retention by University Archives unless otherwise noted; OPR=Office or Department responsible for <i>source of truth</i> records; SO=When superseded or obsolete; SR=Selective Retention by University Archives; UA=University Archives; Y=Year		