



09 SERVICES AND STUDENT SUPPORT RECORDS

University Retention Schedule

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9.1. Library Records

NB: For retention of training & events, see [Retention Schedule - 12 Training Records](#). For general feedback, see [Retention Schedule – 04 Communications and Marketing](#).

9.1.1. General Library Records

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Staff suggestion cards and emails for purchase of books	P/E	End of financial year	1 year	Destroy			Library filing cabinet and Google mailbox	N/A	Not published	
Records relating to the submission of research theses to the British Library	P	N/A	Permanent	N/A		Paper files kept since 2010	Library filing cabinet	Info was not systematically collected prior to 2010	Publicly available via the British Library's catalogues	
Turnstile and room booking records	E	End of academic year	2 years	Delete			Sentry JUNO	N/A	Not published	
Atrium & foyer booking records	E	Date of booked event	30 days	Delete			Google Drive, via form	N/A	Not published	

9.1.2. Enquiries

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Enquiries	E/Springshare LibChat	End of academic year	3 years	Destroy		General and subject enquiries, distance learning enquiries	Library@ mailbox & Springshare LibChat	Tawk.to, OCLC Questionpoint & Zoho archive	Not published	
Staff Wiki - Content	E	When superseded	Dispose	Delete	The content of the Wiki must be kept up to date.	Page owners are required to check and confirm validity of content at least once every 12 months.	Hosted on the PLESK service, supported by IS, managed by Library Wiki Team	N/A	Not published	
Ad-hoc letters & automated notices	Email/P	End of academic year	2 years	Destroy (P) / Delete (E-comms in LMS)			Library Mgt System, email or paper filing	N/A	Not published	
Interlibrary Loans – Books, photocopies and e-copies✘	P/E	End of academic year	6 years	Destroy	Limitation Act 1980	Where copyright declaration has been signed	Blank master held on staff Wiki. Completed forms held on online system	Completed forms in Library filing cabinet	Blank forms available on website	
Copyright declarations✘	P/E	End of academic year	6 years	Destroy		NB: For copyright licences, see Retention Schedule – 10 Strategy and Governance > Contracts and Licences				

✘ - Following technical issues in April 2021, a temporary solution was introduced using Google Forms. The Library has since reverted to the old system. Google form declarations have been archived until expiry reached.

9.1.3. Membership

All library records are anonymised to library number one year after the end of the academic year in which the library account expired (Graduation or Withdrawal) and are completely anonymised two years after the end of the academic year in which the library account expired.

9.1.3.1. Student Borrowing Records and Contact Details

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
No outstanding debt nor overdue books	E	Graduation / withdrawal	2 year	Delete			Library Mgt System	N/A	Not published	
Outstanding debt or overdue books	E	Graduation / withdrawal	2 years	Delete			Library Mgt System	N/A	Not published	

9.1.3.2. 'Referred to Finance' Cases

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Current students	P/E	Settlement of debt or last action	2 years	Destroy		Student data not transferred to the LMS can be accessed through SITS by designated library staff.	Library Mgt System, but supporting paper trail in Library filing cabinet	N/A	Not published	
Past Students	P/E	Graduation / withdrawal	2 years	Delete			Library Mgt System, but supporting paper trail in Library filing cabinet	N/A	Not published	

9.1.3.3. Distance Learners

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Document request service forms	E	Expiry of membership	2 years	Delete		Occasionally received in paper format, but that is rare. Following technical issues in April 2021, a temporary solution was introduced using Google Forms. The Library has since reverted to the old system. Google form declarations have been archived until expiry reached.	DistLib@ mailbox	N/A	Not published	

9.1.3.4. External Readers

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Application forms	P/E	Expiry of membership	1 year	Delete		Includes reference passes. Google data is deleted once the card is collected, but cover sheet used for collection is kept for up to 1 year	Google shared drive accessed by team members with appropriate rights	N/A	Not published	
Parental consent forms for minors	P/E	Expiry of membership	1 year	Delete		16-18 year olds accessing library services or under 16s accompanying a parent using library services must have a parental consent form	Google shared drive accessed by team members with appropriate rights	N/A	Not published	
Day passes	P	Date of issue	3 months	Destroy	Advice of Info Security Architect		Completed paper forms stored in Library office	N/A	Not published	

9.1.3.5. Staff and Contractor Borrowing Records and Contact Details

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
No outstanding debt nor overdue books	E	Expiry of membership	2 year	Delete			Library Mgt System	N/A	Not published	
Outstanding debt or overdue books	E	Expiry of membership	2 years	Delete			Library Mgt System	N/A	Not published	

9.1.4. University Archive & Special Collections

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LIBRARY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
University archive catalogues	E	N/A	Permanent	Archive			eRecords System	N/A	Via the library webpages & Archives Hub	
Accessions Register	E	N/A	Permanent	Archive			eRecords System	N/A	Not published	
Deposit Information	P/E	N/A	Permanent	Archive	To prove transfer of custody to archive for deposited items	Includes: Deposit forms and associated correspondence	Filing cabinet in archive store and eRecords System	This information was not collected prior to 2014	Not published	
Enquiries log and correspondence	E	End of calendar year	3 years	Destroy	Customer service for long-term enquiries	Anonymous statistical data (i.e. number of enquiries in a calendar year and type of documents used) will be retained longer	Email and eRecords system	N/A	Not published	
Storage environment data	E	N/A	Permanent	Archive	To monitor long term changes in storage conditions		Kdrive until close of calendar year, then transfer to eRecords system	Data was not collected systematically until 2014	Not published	
Loan forms	P/E	Return of item from loan	3 years	Destroy	Stated on form	NB: it may be appropriate to hold future forms for a longer period of time, as loan information can be relevant to the item provenance and preservation	eRecords system	N/A	Not published	

9.2. Sport and Recreation

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Terms and conditions	E	When superseded	6 years	Destroy		Approved annually by solicitor	Google Drive or eRecords	Sport & Rec filing cabinets	Published on website	
Rules and regulations	E	When superseded	6 years	Destroy		Approved annually by solicitor	Google Drive or eRecords	Sport & Rec filing cabinets	Published on website	
Schedules of fees for membership, usage, training etc	E	End of financial year	6 years	Destroy		Approved annually by the Board of Governors	N/A	N/A	Published on website by 1st Aug each year	
Timetable of classes, timetables of fitness programmes and LesMills virtual schedule	E	End of academic year	6 years	Destroy		Programmes continuously modified throughout the academic year	Google drive LesMills web-based platform	Google drive / K:drive/ N:drive Fitbox web-based platform	Published on website, via mobile app and in the MRM system	
Class & fitness programme session plans	E	End of academic year	6 years	Destroy			Google drive	N/A	Not published	

9.2.1. Membership and Usage

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Application forms	E	Expiry / termination of membership	6 years	Destroy	Limitation Act 1980	Students, Staff, Associates, Public, Corporate and Juniors	Gladstone database	N/A	Not published	
Requests to terminate membership	E	Expiry / termination of membership	6 years	Destroy	Limitation Act 1980	Cancellation requests are submitted through a form and logged in Hornbill	Formstack & Hornbill	N/A	Not published	
Health Commitment Statements: Members	E	Expiry / termination of membership	6 years	Destroy	Limitation Act 1980	May include doctors' notes	Gladstone database	n/a	Blank statements are available via the web and mobile app	
Health Commitment Statements: Non-members	E	Completion of form	6 years	Destroy	Limitation Act 1980	May include doctors' notes There is an optional in person induction or induction video that users can watch as part of this process, users can also self-certify their competence during the joining process	Gladstone database	n/a	Blank statements are available via the web and mobile app	
Membership fees – payments	E	End of financial year	6 years	Destroy	VAT Act 1994		Gladstone database, Gladstone Pay, Clover (aquirer), DFC (Direct debit)	N/A	Not published	
Usage fees – payments	E	End of financial year	6 years	Destroy	VAT Act 1994		Gladstone database, Gladstone Pay, Clover (aquirer)	N/A	Not published	
Bookings requests for sports facilities	E	Date of use	6 years	Destroy	Limitation Act 1980		Formstack & email	Google Drive	Not published	
Contracts for bookings of 3G, astro turf, multi use games area & grass pitches	E	Date of use	6 years	Destroy	Limitation Act 1980		Gladstone database	eRecords	Not published	
Bookings for classes and fitness programmes	E	Date of class	6 years	Destroy	Limitation Act 1980		MRM System	N/A	Not published	

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Bookings for swimming pool	E	Date of class	6 years	Destroy	Limitation Act 1980		MRM System	N/A	Not published	
Bookings for “virtual” classes	E	Date of class	6 years	Destroy	Limitation Act 1980		LesMills	FitBox	Not published	
Sports facility overviews	E	Date of use	6 years	Destroy	Limitation Act 1980		eRecords	N/A	Not published	

9.2.2. Services

9.2.2.1. Individual Client Records

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Personal training consultation forms (historical)	E	Completion of final session	6 years	Destroy	Limitation Act 1980	2023 – no longer used	N/A	Google Drive May be on N:drives	Not published	
Personal training records, training plans & fitness consultations	E	Completion of final session	6 years	Destroy	Limitation Act 1980		Promywellness web-based platform	N/A	Not published	
Fitness consultations	E	Completion of final session	6 years	Destroy	Limitation Act 1980		Promywellness web-based platform	N/A	Not published	

9.2.2.2. Swim Services

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Expression of interest for swimming lessons	E	Date of form	6 years*	Delete		* Or sooner if specifically states no longer interested	Google Drive	N/A	Not published	
Swimming lessons for children – contact details	E	Date of lesson	6 years	Delete	Limitation Act 1980		Google Drive	N/A	Not published	
Swimming lessons for children - records	E	Until child reaches 25 th birthday	N/A	Delete	Management of swim lessons by teachers Limitation Act 1980	Includes registers, ongoing assessments, contact details and medical conditions	Gladstone system	N/A	Not published	
School swimming assessment forms	E	Date of form	6 years	Delete	Assessment for school swimming Swim England School Award Scheme	Assessment and register for pupils attending lessons using Swim England School Award Scheme	Google Drive	N/A	Not published	
Summary of school assessment	E	Date of form	6 years	Delete	Data provided for schools to update their websites		Google Drive	N/A	Schools publish percentages on their own websites as part of statutory PE requirement	
1:1 swimming lessons – booking and staffing	E	Date of lesson	6 years	Delete	Planning and payment Limitation Act 1980	Summary sheet for planning and booking lessons over the course of the week and to track payment	Google Drive	N/A	Not published	
Monitoring of swimming pool (iTus)	E	After completion of form	5 years	Delete	PWTAG Code of practice	Records should be kept so that continued confidence may be demonstrated for a period of at least five years.	iTus	N/A	Not Published	

9.2.3. Clubs and Societies

This section was removed in 2016 because UPSU took over the clubs and societies. As of September 2019, these are once more managed by UoP. Clubs and societies members will be managed as gym members on the MRM system (see 9.2.1 above).

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
List of clubs and societies	E	End of Academic Year	6 years	Destroy	Limitation Act 1980			N/A	Published on website	
Schedule of events	E	End of Academic Year	6 years	Destroy	Limitation Act 1980			N/A	Published on website	

9.2.4. Schemes and Programmes

Please note: records relating to the management of contractual arrangements, booking of rooms and payments by physiotherapists would be managed as per contracts (see [Schedule 10 – Strategy & Governance Records > 10.7.1 – Non-academic contracts and licenses](#)).

9.2.4.1. Coach Education Programme (historical)

Programme ceased in 2017, this schedule remains for historical records only.

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Schedule of events	E	End of academic year	6 years	Destroy			Programme co-ordinator’s N:drive	N/A	Published on website	
List of attendees	E	End of academic year	6 years	Destroy			Online store	Paper files	Published via online store	
Booking forms (incl. terms and conditions)	E	Expiry of membership	6 years	Destroy	Limitation Act 1980		K:drive	N/A	Published on website	
Payments of fees	E	End of financial year	6 years	Destroy	VAT Act 1994		Online store	N/A	Published via online store	

9.2.4.2. Campus Sports Programme

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Schedule of tournaments	E	End of academic year	6 years	Destroy			Playwaze	Playwaze	Published on website	
Application packs	P/E	Date of tournament	6 years	Destroy			Playwaze	Playwaze	Published on website	
Results lists	P/E	End of academic year	6 years	Destroy			Playwaze	Playwaze	Published on website	

9.2.4.3. Sports Scholarship Scheme

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Terms and conditions	P/E	When superseded	6 years	Destroy	Limitation Act 1980		Locked office filing cabinet	N/A	Published on website	
Register of students enrolled on scheme	E	Expiry of membership	6 years	Destroy	Limitation Act 1980		MRM system	N/A	Photo and course published on website and notice board	
Application forms	P/E	Expiry of membership	6 years	Destroy	Limitation Act 1980		Google form stored on Google Drive	Locked office filing cabinet & in Head of Dept's email	Not published	
Mentoring records of individual students	P/E	Expiry of membership	6 years	Destroy	Limitation Act 1980		Locked office filing cabinet	N/A	Not published	

9.2.4.4. Outreach

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	SPORT & REC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Schedules of activities	E	End of academic year	6 years	Destroy			K:drive	N/A	Published on website	
Records of students enrolled on scheme	E	Expiry of membership	6 years	Destroy	Limitation Act 1980		K:drive	N/A	Published on website	
Records of payments by attendees	E	End of financial year	6 years	Destroy	VAT Act 1994		Held by direct debit company DFC	N/A	Not published	
Bookings	E	Completion of event	6 years	Destroy	Limitation Act 1980		Co-ordinator's N:drive	N/A	Not published	
Parental consent forms	P/E	Completion of event	6 years	Destroy	Limitation Act 1980		Google form stored on Google Drive	N/A	Not published	

9.3. Dental Clinic & Optometry Clinic Records

9.3.1. Dental Clinic

NHS records relating to the treatment of patients at the University of Portsmouth Dental Academy is governed by the Codes of Practice for Handling Information in Health and Care – Records Management Code of Practice, published by the NHS in 2021, but last updated in 2023. Appendix 2 of this code of practice contains the NHS retention schedule. Should the guidance within this code of practice conflict with University of Portsmouth retention schedules, records should be retained in accordance with the longer of the two recommendations.

<https://digital.nhs.uk/data-and-information/looking-after-information/data-security-and-information-governance/codes-of-practice-for-handling-information-in-health-and-care>

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	UPDA RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Referrals from dentists which are not accepted at triage	P/E	Rejection	1 year	Destroy	In case of follow up enquiries					

9.3.2. Optometry Clinic

Currently no NHS contract. However if/when an NHS contract is obtained, patient records for the clinic will be governed by the NHS guidelines (see 9.3.1 above). Until then the following retention applies.

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	OPTOMETRY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Adult patients	E	Date patient last seen	10 years	Destroy	Limitation Act 1980	Even if the patient has subsequently died	Practice Mgt System	N/A	Not published	
Child patients	E	Date patient last seen	10 years *	Destroy	Limitation Act 1980	* or until the child's 25 th birthday, whichever is the later However, if patient has subsequently died, only keep records 10 years from date last seen, even if that would not have made the child 25 years of age.	Practice Mgt System	N/A	Not published	

9.4. Nursery

The University Nursery closed at the end of 2022. All files have been subsequently archived. Electronic records have been archived to the eRecords system. Paper records have been sent to FileStore.

9.4.1. Childcare Policies and Procedures

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	NURSERY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	RAG STATUS
Written procedure to be followed for a child being lost or not collected	P/E	When superseded	7 years	Destroy	Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.2.3) The Day Care and Child Minding (National Standards) Regulations 2003	
Written procedure to be followed where a parent has made a complaint	E	When superseded	6 years	Destroy	The Day Care and Child Minding (National Standards) Regulations 2003; The Childcare (Voluntary Registration) Regulations 2007; Limitation Act 1980	
Written policy for child protection and procedures to be followed in the event of allegations of abuse or negligence	E	Closure of nursery	50 years	Destroy	Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.2.5) The Day Care and Child Minding (National Standards) Regulations 2003; The Childcare (Voluntary Registration) Regulations 2007	

9.4.2. Administrative Records

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	NURSERY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	RAG STATUS
Child records	P	Closure of nursery	50 years	Destroy	Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.1.1) The Day Care and Child Minding (National Standards) Regulations 2003; The Childcare (Voluntary Registration) Regulations 2007	Record of each child looked after on the premises: Full Name, Home Address, Date of Birth, Start & End Dates for Attendance	
Parent records	P	Date child leaves the nursery	2 years	Destroy	The Day Care and Child Minding (National Standards) Regulations 2003; The Childcare (Voluntary Registration) Regulations 2007	Record of a parent for each child who is looked after on the premises: Full Name, Home Address, Telephone Number	
Birth certificates (copy only)	P	Date child leaves the nursery	2 years	Destroy	Early years funding purposes		
Daily records	P	Date of entry	2 years	Destroy	The Day Care and Child Minding (National Standards) Regulations 2003; The Childcare (Voluntary Registration) Regulations 2007	Includes: names of children looked after on the premises that day; their hours of attendance and the names of the persons who looked after them.	
Records of any medical product administered to any child on the premises	P	Date of birth of child	25 years	Destroy	Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.1.6); recommended by the Records Management NHS code of practice The Day Care and Child Minding (National Standards) Regulations 2003; The Childcare (Voluntary Registration) Regulations 2007; Limitation Act 1980	Includes: date and circumstances of administration; by whom it was administered; record of parent’s consent	
Register of complaints	P	Date of record	10 years	Destroy	The Childcare (Voluntary Registration) Regulations 2007 DfES National Standards for Under 8s Day Care and Childminding (Standard 12.3); Ofsted Day Care and Childminding – Guidance to the National Standards (p10)		
Portfolio of work and observations	E	Date child leaves the nursery	3 months	Delete	Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.1.8) To allow parents to retrieve information about their child		
Records of transfer		DO NOT RETAIN			Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.1.7)	Give one copy to the parent and send the other copy to the Primary School that the child will be attending	
Records required for a child protection issue (could encompass any of the above)	P	Closure of nursery	50 years	Destroy	Recommended by RMS Retention Guidelines for Schools – Early Years Provision (Section 16.1.4)		

9.5. Academic Skills (ASK)

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	ASK RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Records of student contact	P/E	Last contact with student	6 years	Destroy	Limitation Act 1980	Paper print outs are copies and only kept for 1 year before being securely disposed	ASK database	N/A	Not published	
Emails from students	Email	Date of email	6 years	Destroy	Limitation Act 1980		ASK Mailbox	N/A	Not published	

9.6. Additional Support and Disability Advice Centre (ASDAC)

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	ASDAC RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Records of student contact: Database	E	Graduation or withdrawal	6 years	Destroy	Limitation Act 1980	Records split into three categories: database, student files & confidential files and Hornbill. Live records are archived upon graduation. Evidence provided electronically by students	Restricted K:drive – Live folder SITS eVision	Restricted K:drive – Archive folder	Shared with individual via SITS eVision	
Potential students – general file	E	End of application year	2 years*	Destroy		* This retention is a maximum. Potential students are stored by academic year. They are retained if they defer to the following year. If they do not register that year, they are then deleted. When a student withdraws via SITS, the record is deleted.	Restricted K:drive	N/A	Not published	

9.7. Student Wellbeing

NB: For retention of training & events, see [Retention Schedule – 12 Training Records](#).

As of 2023, all Wellbeing records have been moved to COREnet

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	WELLBEING RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
COREnet	E	Termination of registration	6 years	Delete	Limitation Act 1980	Includes both internal and external, anonymised and personal database entries. Includes all registrations as part of the COREnet process	External servers	N/A	Not published	
Information Sheets	P/E	When superseded	N/A	Destroy	No longer required		K:drive	K:drive	Published to staff and students in printed form, web and on social media	
Registration Request Spreadsheet	E	End of academic year	6 years	Destroy	Required to create COREnet record and allow registration to take place		Google Sheet, via form	N/A	Not published	
Wellbeing resources	P	When superseded	1 year	Destroy		For example: Handouts; Workbooks; eLearning	K:drive	K:drive	Published to staff and students in printed form, web and on social media	

9.8. Chaplaincy

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	CHAPLAINCY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Basic records of staff/student contact with Chaplaincy	E	Last contact	6 years	Delete	Limitation Act 1980	When a student is referred by Chaplaincy to Wellbeing (and submits the application), their Chaplaincy record will be shared with Wellbeing and held with the Wellbeing case records, covered by 9.7 – Student Wellbeing (above)				
Orders of service for religious services held by the University	E	Date of service	N/A	Archive†	Historic Value	† One printed copy only				

9.9. Residential Services

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	RESIDENTIAL SVS RETENTION PERIOD	STUDENT HOUSING RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Schedule of hall fees	P/E	End of financial year		6 years	Destroy	Business need	In K drive the Excel version and also on the settings of the room rate on StarRez	StarRez	K:drive	Not published	
Halls of residence handbooks	P/E	When superseded		6 years	Destroy	Business need		K:drive	N/A	Hardcopy for students E-copy on website	
Halls of residence guides	P/E	When superseded	N/A		Destroy	Business need		MyPort	K:drive	Published on MyPort	
Hall lists	P/E	End of academic year	N/A	N/A	Destroy	Business need	For example: A-Z of students, fire lists. Some lists will be continuously updated.	StarRez	N/A	Not published	
Summer schools lists	P/E	End of summer school period	N/A		Destroy	Business need	For example: Embassy lists, fire lists	Kx system	N/A	Not published	
Records of access by staff to rooms	P/E	End of academic year	1 year		Destroy	Business need	Red access slip notification	In Room File (hardcopy)	In Hall File	Not published	
Records of security incidents	P/E	End of academic year	3 years		Destroy	Business need	Guard reports, fire alarm activation reports	K:drive	N/A	Not published	
Reports of defects	P/E	Date of repair	2 years		Destroy	Business need	Maintenance requests	StarRez	N/A	Not published	
Reception and porters day books	P/E	When superseded	1 year		Destroy	Business need	Shift handover book	Reception	N/A	Not published	

9.9.1. Individual Residents

NB: For complaints and disciplinary cases against residents, see [Retention Schedule – 11 Student and Course Records > Disciplinary Cases](#).

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	RESIDENTIAL SVS RETENTION PERIOD	STUDENT HOUSING RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Applications	E	End of academic year to which application pertains		6 years	Destroy	Limitation Act 1980	Applications are stored in StarRez software which is hosted centrally on IS servers. Previous filemaker database are deleted according to retention period policy	StarRez	Filemaker	Not published	
Data underpinning accommodation agreements and allocation notices	E	Termination of accommodation agreement		6 years	Destroy	Limitation Act 1980	PAMS system decommissioned in 2016. Data about students with outstanding fees exported to eRecords system. Remaining data deleted following risk assessment.	StarRez	eRecords system	Not published	
Medical disclosures	P/E	Termination of accommodation agreement	1 year	N/A	Destroy	Business need	Medical info when student applies for accommodation is provided on StarRez portal. Medical disclosures is part of accommodation application. It can only be destroyed when the application is destroyed	StarRez	N/A	Not published	
Personal emergency evacuation plans (PEEPs)	P/E	Termination of accommodation agreement	1 year	N/A	Destroy	Business need		StarRez	N/A	Not published	
Records of student contact	E	Termination of accommodation agreement	2 years	N/A	Destroy	Limitation Act 1980	Records are split into two categories: Conduct (Discipline) & Person of Concern (Welfare)	StarRez	StarRez	Not published	
Room inventories	P/E	Termination of accommodation agreement	2 years		Destroy	Business need	Records are stored on StarRez	Restricted Access	Restricted Access	Not published	
Withdrawal requests and written modifications	P/E	Termination of accommodation agreement	2 years	6 years	Destroy	Business need	EYMD form stored on StarRez	StarRez	N/A	Not published	
Letters served for damages	P/E	Termination of accommodation agreement	2 years		Destroy	Business need	Email notification is sent to resident. Charge deducted from damage deposit from StarRez system	StarRez	N/A	Not published	
Room checks – satisfactory	P/E	End of academic year	2 years		Destroy	Business need	Email notification is sent to resident	StarRez	N/A	Not published	

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	RESIDENTIAL SVS RETENTION PERIOD	STUDENT HOUSING RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Room checks – unsatisfactory	P/E	Termination of accommodation agreement	2 years		Destroy	Business need	Email notification is sent to resident	StarRez	N/A	Not published	
Eviction files	P/E	Last action		6 years	Destroy	Limitation Act 1980	Eviction letters and NTQ originals required to be kept	In “Room File”	Hardcopy	Not published	
Halls fees adjustment forms	P/E	End of financial year		6 years	Destroy	Value Added Tax Act 1994		Hardcopy	Hardcopy	Not published	

9.10. Student Housing

9.10.1. Registration Scheme for Landlords

Please note: Advertisements for properties to let are now managed within the online portal by landlords themselves. The daily lists of available shared houses, flats and lodgings are then dynamically generated by the portal. It is therefore no longer feasible to apply retention to this data, so the schedules have been removed from this edition of the retention schedule.

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	CAMPUS SVS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Landlord code of practice, including registration criteria	E	When superseded	6 years	Destroy	Limitation Act 1980		eRecords system	K:drive	Provided to landlords in hard copy	
Registration details – individual landlords	E	Termination of registration*	6 years	Destroy	Limitation Act 1980 JISC recommendation	* On termination of registration, landlord contact details should be removed	Online portal	N/A		
Records of inspections of properties	P/E	Termination of registration	6 years	Destroy	Limitation Act 1980	(aim for hardcopy of inspection to go paperless and input onto eRecords)	K:drive	Hardcopy and online portal	Made available to staff via online portal and in hard copy	
Landlord files	P	Termination of registration	6 years	Destroy	Limitation Act 1980	(may move to eRecords in future)	eRecords system	Hardcopy		

9.10.2. Guidance for Students

NB: For ‘Secure a Home’ event, see [Retention Schedule – 12 Training and Event Records > Training Sessions and Events](#).

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	CAMPUS SVS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Enquiries from individual students	P/E	End of academic year	1 year	Destroy			Email	N/A	Not published	
Information packs and other advice publications for student	P/E	When superseded	1 year	Destroy		(may move to eRecords in future)	K:drive and StarRez online portal	N/A	E-copy on website	

9.11. Student and Neighbour Liaison Service

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	CAMPUS SVS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Good Neighbour publications	E	When superseded	1 year	Destroy		(may move to eRecords in future)	K:drive	N/A	E-copy on website	
Minor complaints and investigations	P/E	Last action	3 years	Destroy			StarRez & email	Filemaker & email archive folder	Not published	
Major complaints and investigations	P/E	Last action	6 years	Destroy	Limitation Act 1980	These are individual cases, usually referred to the community tutor for action and involving community mediation	StarRez & email	Filemaker & email archive folder	Not published	

9.12. Student Finance

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	STUDENT FINANCE RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Fund applications and supporting evidence	E	End of academic year of application	6 years	Destroy	HEFCE Fund guidance; Limitation Act 1980 JISC recommendation	All applications held on eRecords	eRecords System	eRecords system	Not published	
Emergency Loan Ledgers (historical)	E	End of academic year of application	6 years	Delete	Limitation Act 1980 JISC recommendation		Secure K:drive	Secure K:drive	Not published	
Emergency Loan vouchers (historical)	P/E	End of academic year of application	6 years	Delete and destroy	Limitation Act 1980 JISC recommendation	Paper now destroyed at year end	eRecords System	eRecords system	Not published	
Payment schedules (Bacs and name reports)	P/E	End of academic year of application	6 years	Delete and Destroy	Limitation Act 1980	Paper now destroyed at year end	Secure K:drive	Secure K:drive	Not published	
Case work and appeal notes/letters	E	End of academic year of application	6 years	Delete	Limitation Act 1980		eRecords System	eRecords System	Not published	
Supporting evidence for casework	E	End of academic year of application	1 year	Delete	Audit recommendation to destroy evidence once submitted for appeal	Can be retained on file longer with student's permission	eRecords System	eRecords System	Not published	
Student payments databases	E	End of academic year	6 years	Delete	Limitation Act 1980	Includes ASDAC spreadsheet, care leavers and estranged students	Secure K:drive	Secure K:drive	Not published	
Student payment reports	E	End of academic year of report submission	6 years	Delete	Limitation Act 1980		Secure K:drive	Secure K:drive	Not published	
Food voucher ledger	P	End of calendar year	n/a	Scan to eRecords & destroy paper		Retain scanned copy in line with relevant eRecords file	Student Finance filing	eRecords System	Not published	

9.13. Law Clinic Records

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	LAW SCHOOL RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Client files	E	Last interaction with client	6 years	Destroy	Limitation Act 1980	Client letters and case notes electronically	CLIO system	Law school filing cabinet & K:drive	Not published	
Law Clinic Spreadsheet	E	End of academic year statistics produced	N/A	Destroy	To facilitate management of the Law Clinic during the academic year. To enable the production of statistics at the end of the academic year.		Clinic tutor's Google Drive	N/A	Not published	

9.14. Employability Service

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	EMPLOYABILITY RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
MyCareers service – Individual student records	E	Graduation/Withdrawal	5 years†	Anonymise		Includes: base record created with data from Student Record system, plus details of: appointments (bookings and notes), communications via the system, events attended and volunteering/graduate recruitment service (application forms, matching with roles and interview preparation). At graduation/withdrawal, student records are deactivated, although students can still access the careers services by logging in at least once a year. † Exceptions can be made to allow longer access to the service, in exceptional circumstances (i.e. student was prevented from accessing service by ill health)	MyCareers system	N/A	Not published	
Employability guides	P/E	When superseded	N/A	Dispose			E – Website P - Employability	N/A	Available on website and from Employability	