

Introduction

Why do we need a data retention policy?

- We need to comply with the requirement of the General Data Protection Regulation that personal data is not kept for longer than necessary. If we retain personal data for longer than we need to, we will also breach the requirement that personal data must be relevant and limited to what is necessary to meet our purposes.
- We need to keep data for as long as it is required to meet operational purposes or for organisational archiving relating to scientific, historical research or statistical purposes.
- We need to make best use of storage space, both physical and digital.

Scope

- This guidance seeks to provide indicative guidance for those responsible for managing student records and student administration. It covers the main corporate systems such as SITS, CMIS, GSR, OXCORT, DWH, and local Access databases, Excel spreadsheets, email and paper, for example, interview scores held locally in a departmental database.
- Data extracted from master systems and stored in local drives or email should be destroyed after use to avoid unnecessary duplication, and to ensure data is not held for any longer than necessary.
- Excluded: Retention guidelines for maintaining transactional records, for example retention of requests for transcripts.

Retention periods

- The master copy of data should not be deleted before the expiry of the retention period. Supplementary copies (e.g. Excel downloads, or working files) should be deleted before the retention period if they no longer serve a purpose. Careful consideration should be given as to whether supplementary copies of data should be held or could be destroyed.
- When the retention period is reached, the data should be destroyed as soon as practicable and in a secure manner.

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Further information: *Data Quality Team* (dqt@admin.ox.ac.uk)

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Admissions						
A.1.1	Application details (central): successful candidates who enrol	Information to enable recruitment and funding panels to determine admissions outcomes	interview and admissions test scores, previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	ADSS, SITS & eVision, paper copies in central teams, data warehouse, definitive dataset (including its processing files), other reporting Access databases	permanent in master system i.e. SITS/eVision; else: End of student relationship + 6 years UG Admissions data is held in ADSS for 12 months before being permanently stored on a dedicated reporting server.	GAR and UAO (with SDMA)
A.1.2	Application decisions (central): successful candidates who enrol	Information on application decisions	college and departmental decisions, offers (central administration)	ADSS, SITS & eVision, paper copies in central teams, data warehouse, definitive dataset (including its processing files), other reporting Access databases	permanent in master system i.e. SITS/eVision; else: End of student relationship + 6 years UG Admissions data is held in ADSS for 12 months before being permanently stored on a dedicated reporting server.	GAR and UAO (with SDMA)
A.2.1	Application details (colleges): successful candidates who enrol	Information to enable recruitment and funding panels to determine admissions outcomes	interview and admissions test scores, previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	Paper copies in colleges, local electronic records for distribution and storage (PDF, Excel and Word)	End of student relationship + 6 years	Colleges
A.2.2	Application decisions (colleges): successful candidates who enrol	Information on application decisions	college decisions, offers (local administration)	Paper copies in colleges, local electronic records for distribution and storage (PDF, Excel and Word)	End of student relationship + 6 years	Colleges

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.3.1	Application details (departments): successful candidates who enrol	Information to enable recruitment and funding panels to determine admissions outcomes	interview and admissions test scores, previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	Paper copies in departments, local electronic records for distribution and storage (PDF, Excel and Word)	End of student relationship + 6 years	Departments
A.3.2	Application decisions (departments): successful candidates who enrol	Information on application decisions	departmental decisions, offers (local administration)	Paper copies in departments, local electronic records for distribution and storage (PDF, Excel and Word)	End of student relationship + 6 years	Departments
A.4.1	Application details (central): unsuccessful candidates; successful candidates who don't enrol	Information to enable recruitment and funding panels to determine admissions outcomes	interview and admissions test scores, previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	ADSS, SITS & eVision, paper copies in central teams, data warehouse, definitive dataset (including its processing files), other reporting Access databases	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation. UG Admissions data is held in ADSS for 12 months before being permanently stored on a dedicated reporting server.	GAR and UAO (with SDMA)
A.4.2	Application decisions (central): unsuccessful candidates; successful candidates who don't enrol	Information on application decisions	college and departmental decisions, offers (central administration)	ADSS, SITS & eVision, paper copies in central teams, data warehouse, definitive dataset (including its processing files), other reporting Access databases	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation. UG Admissions data is held in ADSS for 12 months before being permanently stored on a dedicated reporting server.	GAR and UAO (with SDMA)

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.5.1	Application details (colleges): unsuccessful candidates; successful candidates who don't enrol	Information to enable recruitment and funding panels to determine admissions outcomes	interview and admissions test scores, previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	Paper copies in colleges, local electronic records for distribution and storage (PDF, Excel and Word)	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation.	Colleges
A.5.2	Application decisions (colleges): unsuccessful candidates; successful candidates who don't enrol	Information on application decisions	college decisions, offers (local administration)	Paper copies in colleges, local electronic records for distribution and storage (PDF, Excel and Word)	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation.	Colleges
A.6.1	Application details (departments): unsuccessful candidates; successful candidates who don't enrol	Information to enable recruitment and funding panels to determine admissions outcomes	interview and admissions test scores, previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	Paper copies in departments, local electronic records for distribution and storage (PDF, Excel and Word)	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation.	Departments
A.6.2	Application decisions (departments): unsuccessful candidates; successful candidates who don't enrol	Information on application decisions	departmental decisions, offers (local administration)	Paper copies in departments, local electronic records for distribution and storage (PDF, Excel and Word)	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation.	Departments
A.7.1	Data in application system: Application for postgraduate courses not submitted	Data saved to enable applicants to continue with their application	previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	SITS & eVision, paper copies in central teams	Current admissions cycle + 1 year for full records.	GAR

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.7.2	Data for application for postgraduate courses not submitted (colleges)	Information to enable applicants to complete their application if submitted	previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	Paper copies in colleges, local electronic records for distribution and storage (PDF, Excel and Word)	Current admissions cycle + 1 year for full records.	Colleges
A.7.3	Data for applications for postgraduate courses not submitted (departments)	Information to enable applicants to complete their application if submitted	previous qualifications, previous education, supporting statements, references, personal data covered under Person (section F).	Paper copies in departments, local electronic records for distribution and storage (PDF, Excel and Word)	Current admissions cycle + 1 year for full records.	Departments
A.8	Data in applications for postgraduate courses: All records	Information to enable survey invitations to be sent to applicants, information received in survey responses	Name, course applied to, other institutions applied to	Online surveys (formerly BOS), Excel	End of the admissions cycle in which applied plus one year for full records. Permanent: anonymised skeleton records without supporting documentation.	GAR
A.12	Enquiries and contact information from students and applicants to undergraduate courses, graduate courses and graduate access programmes	To respond to enquiries and allow tracking of enquiries received	enquirer name and contact information, enquiry details, enquiry date, metadata associated with site visitors e.g. IP address	Oracle Service Cloud (formerly RightNow)	All enquiries to be deleted 2 years after closure. Contact records selectively deleted after 2 years: a. All contacts without an associated enquiry record from the last 2 years will be deleted, except for b. permanent retention of teacher contacts for undergraduate admissions, with deletion on request. Metadata associated with site visitors (e.g. IP address, browser metadata) deleted after 90 days.	GAR, UAO, SFF, Alumni, PAD

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.13	Graduate access programmes (e.g. UNIQ+ & Wellcome BVS): unsuccessful candidates; successful candidates who don't enrol	Personal data submitted during applications to graduate access programmes used for: assessment of applications	Individual data about applicants including: name, DOB, email address, postal address, postcode, telephone number, school, undergraduate institution including subject and qualifications, employment including income, disability, gender, ethnicity, in-care status, young carers, free school meals, first generation HE, financial support at university, parental/guardian degree status.	Word, Excel, OSC (Oracle Service Cloud – enquiry management system), SharePoint, paper copies.	Current application cycle + 1 year for, after which data will be kept permanently in an anonymised skeleton record. (See also A.15 and A.16 for retention of data required for evaluation of programme and outreach activity) Anonymised information retained by the Wellcome Trust in accordance with their privacy and retention policy.	GAR
A.14	Graduate access programmes (e.g. UNIQ+ & Wellcome BVS): successful candidates who enrol	Personal data submitted during applications to graduate access programmes used for: assessment of applications; pre-arrival assessment of disability support requirements; programme administration (including the organisation of events, supervision and mentorship).	Individual data about applicants including: name, DOB, email address, postal address, postcode, telephone number, school, undergraduate institution including subject and qualifications, employment including income, disability, gender, ethnicity, in-care status, young carers, free school meals, first generation HE, financial support at university, parental/guardian degree status.	Word, Excel, OSC (Oracle Service Cloud – enquiry management system), SharePoint, paper copies.	End of relationship + 6 years, then permanent retention in an anonymised skeleton record. (See also A.15 and A.16 for retention of data required for evaluation of programme and outreach activity) Anonymised information retained by the Wellcome Trust in accordance with their privacy and retention policy.	GAR

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.15	Graduate access programmes (e.g. UNIQ+ & Wellcome BVS): measuring effectiveness	Personal data submitted during applications to graduate access programmes used for: surveying graduate access programme applicants and participants; processing information received in survey responses; evaluation and reporting of programme effectiveness.	Minimised applicant record: Name, DOB, gender, email address, postal address, postcode, telephone number, school, undergraduate institution including subject and qualifications.	Online surveys (formerly BOS), Excel, Adestra email client, paper copies.	Current application cycle + 6 years, after which data will be kept permanently in an anonymised skeleton record	GAR
A.16	Outreach (undergraduate admissions and graduate admissions): HEAT (Higher Education Access Tracker)	Evaluation of outreach activity	Individual data about outreach participants including name, dob, postcode, school, qualifications, disability, gender, ethnicity, in care status, young carers, free school meals, first gen HE, parental occupation.	Colleges, departments, and central teams may use Word, Excel, HEAT, Access, Webforms, paper copies.	<p>UG: Students with permission to track and a complete record will be retained for 15 years from when their HE ready year indicates they are able to enter HE.</p> <p>Students who have given permission to track but don't have a complete record will be deleted 5 years after their record was first created</p> <p>At annual review, students who have not given their permission to track will be deleted 5 years after their record was first created.</p> <p>PG: In accordance with the published HEAT data privacy policy.</p>	UAO and GAR

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.17	Outreach undergraduate admissions: Personal data	Personal data related to participants to assist with safeguarding, risk assessment and facilitate participation in outreach activity	Name; Address; Disability; Dietary; DOB; postcode, qualifications, gender, ethnicity, in care status, young carers, free school meals, first gen HE, parental occupation.	Excel, Access, Caspio, Webforms, paper records	11 years after intervention (UNIQ) i.e. until individual is 27. For different periods: Student [Personal Info inc gender, dob, address, schools] : UNIQ applicant year + 10 years. Teacher reference Data: UNIQ applicant year + 3. Raw listed subject & grades, highers studying: UNIQ applicant year + 4. Equality Information [inc disability, ema, ethnicity, parental details]: UNIQ applicant year + 6. Further details [inc diet, disabilities, medication, em contact]: UNIQ applicant year + 5. Undergraduate admissions: UNIQ applicant year + 10 Personal Statement: UNIQ applicant year + 2	UAO
A.18	Recruitment and Marketing: Personal data collected in connection with prospective applications to graduate courses	Personal data related to registration for mailing lists; registering for attendance of recruitment events and post-event surveys.	Name, email, address, disability (for building access requirements), dietary requirements, dob, current institution, current course, questions/comments in connection with social media advertising	Excel, Webforms, paper records, Adestra (mailing lists), Social Media platforms (replying to queries/comments), Online surveys (formerly BOS), University website	End of the admissions cycle plus one year for full records (except social media), after which data will be kept permanently in an anonymised skeleton record. Permanent: user-generated data on social media (e.g. likes, comments and shares) remain permanently stored on the platform.	GAR

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
A.19	Recruitment and Marketing: Personal data collected to support graduate marketing activity	Release/consent forms (audio visual); copyright and attribution data for images, video and audio recordings uploaded to the website and social media; current student and alumni registration data for events, focus groups and competitions.	Name, email, address, disability (for building access requirements), dietary requirements, dob, current institution, current course.	Excel, Webforms, paper records, Social Media platforms (attribution data for audio and visual media), University website	End of the admissions cycle plus one year for full records, after which data will be kept permanently in an anonymised skeleton record. Permanent: data required to maintain copyright and attribution log for images, video and audio recordings.	GAR
A.20	Recruitment and Marketing: Personal data collected in connection with prospective applications to undergraduate courses	Personal data related to sign-ups for mailing lists, sign-ups for events, feedback surveys, release forms (audio visual), copyright and attribution data for images, video and audio recordings uploaded to the website and social media	Name, email, address, current institution, mature student, disability, care experienced	Excel, Webforms, paper records, Adestra (mailing lists), Social Media platforms (attribution data for audio and visual media)	End of the admissions cycle in which applied plus one year for full records. Permanent: data required to maintain copyright and attribution log for images, video and audio recordings.	UAO
A.21	Recruitment and Marketing: Personal data collected to support undergraduate marketing activity	Release/consent forms (audio visual), copyright and attribution data for images, video and audio recordings uploaded to the website and social media	Name, email, address, current institution, current course, current college.	Excel, Webforms, paper records, Social Media platforms (attribution data for audio and visual media), University website	Permanent: data required to maintain consent, copyright and attribution log for images, video and audio recordings	UAO

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A.22	Information on relevant, unspent criminal convictions	So that appropriate steps can be taken to facilitate effective support and/or assess whether a prospective student poses an unacceptable risk to students and staff.	Declaration of whether or not an applicant has a relevant, unspent criminal conviction (Y/N), alongside further paperwork required for the Criminal Convictions Panel.	Declaration (Y/N): SITS:Vision (PG), Online surveys (UG) Additional paperwork: paper and electronic files (director of GAR/UAO)	For those who do not enrol: end of admissions cycle plus one year For those who do enrol: end of student relationship plus 6 years	UAO and GAR

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Careers						
B.1	Careers	Information to support the collegiate University's management of careers services.	careers meetings, internship applications, internship placements,	Events and Vacancy database, held and managed by gti, 3rd party supplier of TargetConnect	Duration of enrolment +3 years	Careers
B.2	Careers intentions	To provide schools with career registration data for their students, and the University with aggregate career intention data	name, social background data, career intention, industry interest	SurveyMonkey and then the careers Service	End of student relationship + 6 years	Careers
B.3	DLHE / Graduate Outcomes	Survey information from recent graduates	job title, job details, company, dates, salary	Careers, SDMA, data warehouse	End of student relationship + 6 years anonymised data held in data warehouse permanently	Careers
B.4	Internship placements	Information to support the collegiate University's publication of internships.	internship placement, company, recruiter contact details, dates, income	Events and Vacancy database, held and managed by gti, 3rd party supplier of TargetConnect	Company information including recruiter's contact details remains until company asks for it to be deleted, or when they inform the university the recruiter has left their company	Careers
B.5	Job opportunities	Information to support the collegiate University's publication of job opportunities	job title, job details, company, recruiter contact details, dates, income	Events and Vacancy database, held and managed by gti, 3rd party supplier of TargetConnect	Company information including recruiter's contact details remains until company asks for it to be deleted, or when they inform the university the recruiter has left their company	Careers

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Course						
C.1	Incorporations	Information relating to incorporated degrees		SITS, paper copies	paper copies +3 years following incorporation ; Permanent in master system i.e. SITS/eVision	Student Registry
C.2	Matriculation lists - hardcopies	Recording matriculation attendance	name, title, subject, type, owning department(s)	SITS, paper copies	paper copies +3 years following matriculation ; Permanent in master system i.e. SITS/eVision	Student Registry
C.3	Module and assessment details	Description of course structures for teaching and assessment, for publications (prospectus) and for resource allocation.	title, length, subject, offerings, owning department(s)	SITS & EVision, data warehouse	Permanent in master system i.e. SITS/eVision	Student Registry
C.4	Programme creation and amendment data	Programme and module approval information	title, length, subject, type (UG, PGT, PGR) curriculum, syllabus, owning department(s), approvers	SharePoint, paper files, emails	Set-up date + 6 years	Student Registry
C.5	Programme details	Description of course structures for teaching and assessment, for publications (prospectus) and for resource allocation.	title, length, subject, type (UG, PGT, PGR) curriculum, syllabus, owning department(s)	SITS & EVision, data warehouse	Permanent in master system i.e. SITS/eVision	Student Registry

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Exams & Assessments						
D.1	Alternative arrangements	administer alternative arrangements for examinations (e.g. extra time)	student names, student personal information such as health, alternative arrangements made	CMIS, E&A SharePoint sites, E&A local databases and excel + SITS/E vision	End of student relationship + 1 year for Colleges and departments. +6 years for E&A held records.	Student Registry
D.2	Assessment marking	Administering the marking of examination scripts and submissions; collating examination results; issuing pass lists and individual notifications of examination results	Examiner names, scaling activities, results and outcomes	Exam Board files	2 years after release of results as per instructions in Policy and Guidance for examiners.	Student Registry
D.3	Exam papers	Content of exam papers	exam paper questions	WebLearn, Word, Oxam	Retained until examination sat, thereafter permanent copy kept on OXAM.	Student Registry
D.4	Examination entry	To enter students on to examinations and assessments, to inform administration and operations and to provide information for student record	Examination entry, change in options and late option	eVision, University Shop	End of student relationship + 6 years	Student Registry
D.5	Examinations	Information to support the University's administration of examinations.	administering examination materials; timetabling and organising examinations; attendance monitoring. Student timetables (dates, venues), alternative arrangements (extra time, computer access)	CMIS, E&A local databases, SharePoint and Excel + SITS/E vision for individual timetables	2 years after the final examiners' meeting (where results are finalised) as per instructions in Policy and Guidance for examiners. For multi-part examinations, this means 2 years after the final examiners' meeting for the final Part.	Student Registry

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
D.6	Examiner appointment	to appoint examiners to examine student assessment	name, contact details, examination, examiner type	EAP, HRIS, hardcopy forms + SharePoint	Exam board notes - permanent. Otherwise, termination of appointment + 6 years for administrative records.	Student Registry
D.7	Examiner payment	to pay examiners for examining student assessment	name, contact details, payment (banking) details	EAP, hardcopy expenses claims form, Financials + SharePoint	Termination of appointment + 6 years (Financial record regulations)	Student Registry
D.8	Mitigating Circumstances Notice to Examiners (Applications)	review mitigating circumstances at examination boards.	student names, student personal information such as health, action taken in response to mitigating evidence.	eVision, E&A SharePoint sites, E&A local databases and excel	End of student relationship + 1 year for Colleges and departments. +6 years for E&A held records.	Student Registry
D.9	Mitigating Circumstances Notice to Examiners (Outcome)	The outcome of the review of mitigating circumstances applications by examination boards	student names, student personal information such as health, action taken in response to mitigating evidence.	eVision, E&A SharePoint sites, E&A local databases and excel	End of student relationship + 1 year for Colleges and departments. +6 years for E&A held records.	Student Registry
D.10	Invigilators	Appointment, training and rotas of Invigilators	recruitment data, training information, training attendance, examination rotas	E&A local databases	Current academic year + 1 year	Student Registry
D.11	Prizes: determination of prizes awarded to individual students	Consideration of allocation of prizes to students	names of students considered, results, discussion outcomes.	Departmental and college	Current academic year + 1 year	departments and colleges
D.12	Prizes: outcome of prizes awarded to individual students	Record of prizes made to students by departments and colleges	student names, student prizes awarded	SITS4Colleges, departmental and college.	Permanent record	departments and colleges

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
D.13	Student Assessment activity and outcomes	Details of assessments, dates taken and final results.	student assessment enrolments (assessment titles and when taken) and results outcome	Core student record system (SITS & eVision), GSO paper files, results lists, data warehouse	Post 2007 - Permanent in master system(s). Data held outside of master systems (e.g. excel, local databases) 2 years after release of results as per instructions in Policy and Guidance for examiners. Pre 2007 - One copy held permanently in departmental and college systems where they exist.	Records after 2007 - Student Registry, departments and colleges Records pre-2007 - departments and colleges
D.14	Student assessments: research students (submitted work)	student work to be assessed	research students theses (submitted work)	Digital copies for examiners held in RTDS and department systems.	Student given Leave to Supplicate + 6 months	Student Registry
D.15	Student assessments: taught students (submitted work)	student work to be assessed	student exam scripts and submitted work	Mostly hard copies. Some digital copies held in WebLearn and department systems.	Final Exam Board meeting + 6 months	Student Registry
D.16	Submissions Administration	Information to support the University's administration of submitted assessments.	Assessment titles offered, submission dates, late and non-submissions	E&A local databases, SharePoint and Excel + SITS/eVision	Final Exam Board meeting + 6 months	Student Registry

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Fees & Funding						
E.1	Student Fees & Funding: Fee administration (including fee schedule)	Determination of fee liability, record of payments and late/non payments (including amounts). Liaison with SLC and Research Councils and other funders. Production of fee schedule to support the collegiate university's management of student fees.	payments, correspondence about payments, bank details, students fee liability, fee status, fees due, enrolment records, late/non payment, sponsorships (including central funding)	Email, Word/Excel documents, SITS & eVision, local Access database	End of student relationship + 6 years, unless permanent retention of some details is required by Financial for historical/archiving purposes. Information on fees charged to students is permanent in HESA files. *records for offer holders who do not commence study should be deleted in line with the admissions policies for successful applicants who don't enrol, i.e. end of admissions cycle + 1 year*	Fees & Funding
E.2	Financial support publicity (fees and funding (internal and external sources))	Information to publicise the collegiate University's financial support schemes and fee levels	bursary/scholarship name, donor details, sums available, fee levels	MS Dynamics (SFF Fees & Funding Search), Web content	Permanent for historical/archiving purposes (includes record of fee levels)	Fees & Funding

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
E.3	Financial Support administered by Student Fees & Funding	<p>Information to support the collegiate University's management of financial support schemes (including hardship)</p> <p>This information forms part of the HESA return.</p>	<p>Student personal information and details of award processes, financial support provided, such as name of scheme and sum provided.</p> <p>Details such as means-tested (household income) information used for allocation of scholarships and undergraduate bursaries, sensitive personal information received in hardship applications, and bank details provided for payments to be made.</p>	SITS, eVision, Access databases, Excel, emails and paper files	<p>Normally end of student relationship + 6 years, with exceptions below:-</p> <p>US loans</p> <ul style="list-style-type: none"> Records related to borrower's eligibility and participation—3 years from the end of the award year in which the student last attended All other records, including any other reports or forms—3 years from the end of the award year in which the report was submitted <p>Hardship funding (all forms) - application year + 2 years (sensitive data)</p> <p>Permanent records of student, award name and award amount required for some scholarships with lifelong relationships to support donor/alumni relations. External funding schemes (e.g. US and UK loans) - retention of anonymised records for data analysis.</p> <p>Permanent in HESA files</p>	Fees & Funding

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
E.4	Financial Support not administered by Student Fees & Funding	Information to support the collegiate University's management of financial support schemes (including hardship) This information forms part of the HESA return.	Student personal information and details of award processes, financial support provided, such as name of scheme and sum provided. Details such as means-tested (household income) information used for allocation of scholarships and undergraduate bursaries, sensitive personal information received in hardship applications, and bank details provided for payments to be made.	SITS, eVision, Access databases, Excel, emails and paper files	Normally end of student relationship + 6 years, with exceptions below:- Hardship funding (all forms) - application year + 2 years (sensitive data) Permanent records of student, award name and award amount required for some scholarships with lifelong relationships to support donor/alumni relations. Permanent in HESA files	Fees & Funding
E.5	Student fee status	to determine fee category	Personal data including fee status, residency and nationality information, passport, visa, immigration status	SITS & eVision, data warehouse, Excel, email	Permanent in master system i.e. SITS/eVision Supporting material for assessments (sensitive) application year + 2 years *records for offer holders who do not commence study should be deleted in line with the admissions policies for successful applicants who don't enrol, i.e. end of admissions cycle + 1 year*	Fees & Funding

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Person						
F.1	Contact details	Personal data collected to support the collegiate University's provision of support for academic, pastoral and social requirements.	email, address, telephone. Data may be shared with Oxford City Council for accommodation lists and council tax purposes.	eVision and college databases	End of student relationship + 6 years	Student Registry
F.2	Data for electoral register	Personal data collected to support the collegiate University's provision of support for academic, pastoral and social requirements.	national insurance number. Data shared with Oxford City Council with student permission.	SITS, eVision	End of student relationship + 6 years	Student Registry
F.3	Data on family and friends	Personal data collected to support the collegiate University's provision of support for academic, pastoral and social requirements.	emergency contact details, carer responsibilities	SITS & EVision	End of student relationship + 6 years	Student Registry
F.4	Disability data	Personal data collected to support the collegiate University's provision of support for academic, pastoral and social requirements.	individual's disability details, information on arrangements put in place to support student including GP letters and medical assessments	SITS, eVision; Maximizer (CMS); Zoho; SharePoint; Excel	End of student relationship + 6 years Permanent in HESA files, anonymised permanent record in data warehouse	Student Welfare and Support Services

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
F.5	Other	Personal data collected to support the collegiate University's provision of support and induction for academic, pastoral and social requirements.	names, Person IDs, nationality	SITS & eVision, data warehouse	permanent in master system i.e. SITS/eVision	Student Registry
F.6	Special categories of personal data as identified in GDPR	Special category data (formerly known as sensitive personal data) collected for equality monitoring purposes and for HESA returns	ethnicity, religious belief, sexual orientation	SITS & EVision, data warehouse, HESA file, definitive dataset	End of student relationship + 6 years. Permanent in HESA files, anonymised permanent record in data warehouse	Student Registry
F.7	Student Support	Information to support the provision of counselling support to students.	Students application form, session meeting dates and notes, GP letters.	SITS, eVision; Titanium (CMS)	End of Student relationship + 6 years	Student Welfare and Support Services
F.8	Visa and immigration: CAS data	Personal data collected to enable colleges and departments to issue CAS numbers.	passport data, visa data, citizenship, fees information and copies of passport and visa scans kept on college files.	SITS & EVision	End of student relationship + 6 years	Student Registry
F.9	Visa and Immigration: changes in student circumstances	Information collected to report to Home Office on changes in student circumstances	names, change of circumstances	SITS & EVision, Dynamics (CRM)	End of Student relationship + 6 years	Student Registry
F.10	Visa and immigration: attendance checks	Data collected to confirm student attendance throughout the course on a termly basis as required by the Home Office.	names and confirmation of type of contact point met e.g. submitted work, attended compulsory lecture.	lists compiled via eVision, email and files	End of student relationship + 1 year (Home Office requirement)	Student Registry

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Post award						
G.1	Degree ceremony	to run degree ceremonies	names, ceremony dates, attendance	SITS & eVision, email and files	permanent in master system i.e. SITS/eVision; Also permanent in paper historical records.	Student Registry
G.2	Degree Ceremony signature lists - hardcopies and annotated copies	lists of ceremony attendees, used to respond to queries	names, ceremony dates, attendance	paper files	+3 years following degree ceremony	Student Registry
G.3	Degree verification	correspondence requesting and providing information to verify student award outcomes	names, course dates, results and outcomes	Online Shop, email and files, Advanced Secure	Email and files: completion of verification + 6 months Online Shop records: 7 years Advanced Secure: permanent record	Student Registry
G.4	Material to support reference writing	Material used to support the writing of academic references. <i>Please note: academic progress reports (e.g. supervision or tutorial reports) and final examiners reports (where these are still available) should not be used for the purpose of writing references without the consent of the person in question.</i>	names, course dates, progress reports and on course information, results and outcomes <i>Please note: academic progress reports (e.g. supervision or tutorial reports) and final examiners reports (where these are still available) should not be used for the purpose of writing references without the consent of the person in question.</i>	SITS & eVision, email and paper files	permanent in master system i.e. SITS/eVision; else: End of student relationship + 6 years See section H (for retention of progress reports, milestones, skills acquisition, etc.) and section I (for retention of on course information)	departments and colleges

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
G.5	Written references	Retaining previously written references will allow them to be re-used	Written reference	email and paper files	Date of writing reference + 12 years	departments and colleges
Research students						
H.1	Examinations: viva arrangements	Information to support the collegiate University's management of research student examinations.	examiner names, Thesis title, submission and viva details, outcomes	SITS & eVision, Degree Conferral card index, GSO paper files, Bodleian Library (thesis), data warehouse	<p>permanent in master system i.e. SITS/eVision; else: End of student relationship + 6 years for completed students. End of student relationship + 35 years for withdrawn students.</p> <p>The above applies, unless either of the following criteria are met: a) There is an outstanding complaint/investigation/claim, in which case the file should be retained and the department should consult Legal Services on when it would be appropriate to destroy it b) A complaint/investigation/claim has been concluded, but the department considers it likely that further investigations may be required. In this case the department should consult Legal Services on the best course of action</p>	Student Registry and Div Coordinators
H.2	Examinations: thesis (examiners copy)	student work to be assessed by examiners	digital and hard copy thesis	RTDS (digital copies), hard copies at Exam Schools, and with examiners.	6 months after students were notified that they are ready for collection at Exam Schools or can be posted to them at a cost.	Student Registry

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
H.3	Examinations: thesis (Bodleian copy)	Catalogued in Bodleian library	digital and hard copy thesis	Digital and hard copies with Bodleian.	permanent copy	Bodleian
H.4	Milestones: assessment details	Information to support the collegiate University's management of student transfers and confirmation of status.	date of assessment, outcome	SITS & EVision, data warehouse, Degree Conferral card index, GSO paper files	permanent in master system i.e. SITS/eVision; else: End of student relationship + 6 years for completed students. End of student relationship + 35 years for withdrawn students. Please refer to the exceptions listed in H1 above.	Student Registry and Div Coordinators
H.5	Milestones: reporting	Information to support the collegiate University's management of student transfers and confirmation of status.	reports, comments on progress and skills developments	Emails and hardcopy forms	End of student relationship + 6 years for completed students. End of student relationship + 35 years for withdrawn students. Please refer to the exceptions listed in H1 above.	Student Registry and Div Coordinators
H.6	Skills training	record of skills training activities	courses, attendance dates, outcomes	Local departmental systems	Permanent in master system(s)	Student Registry and Div Coordinators

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
H.7	Supervision	Information to support the collegiate University's management of supervision.	supervisor name, start and end dates of supervision, % supervision	SITS & EVision, data warehouse, OxCort and GSR	permanent in master system i.e. SITS/eVision; else: End of student relationship + 6 years for completed students. End of student relationship + 35 years for withdrawn students. Please refer to the exceptions listed in H1 above.	Student Registry and Div Coordinators
H.8	Supervision: reports	Information to support the academic development and progress of students	Supervisor reports	GSR, local departmental and college systems	End of student relationship + 6 years for completed students. End of student relationship + 35 years for withdrawn students. Please refer to the exceptions listed in H1 above.	Student Registry and Div Coordinators

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Student on course						
I.1	Accommodation	Information to support the collegiate University's management of student accommodation	start and end dates of tenancy, location of accommodation	Accommodation Office and college databases	End of student relationship + 6 years	Colleges and Graduate Accommodation office
I.2	Appeals	paperwork supporting appeals process and recording of outcomes	background paperwork and outcomes	Proctors' Office (paper and digital)	End of student relationship + 6 years	Proctors' Office
I.3	Award Outcomes	Permanent record of students' award outcomes (both individual marks and final outcomes)	Student Award outcomes	Core student record system (SITS & eVision), Degree Conferral card index, GSO paper files, results lists, data warehouse	Permanent in master system(s). Data held outside of master systems (e.g. excel, local databases) should be destroyed after use (completion of final exam brd + 2yr) see Policy & Guidance for Examiners.	Student Registry
I.4	College	Information on the student's college interactions	college name, collections, dining, college advisor	eVision and college databases	end of student relationship +6 years	Student Registry and colleges
I.5	Complaints	paperwork supporting complaints process and recording of outcomes	background paperwork and outcomes	Proctors' Office (paper and digital)	End of student relationship + 6 years	Proctors' Office
I.6	Course and college details	To provide official record of student study	College, Course code and title, Start and matriculation dates, End and conferral dates	SITS & eVision, data warehouse	permanent in master system i.e. SITS/eVision	Student Registry

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
I.7	Disciplinary	paperwork supporting disciplinary process and recording of outcomes	background paperwork and outcomes	Proctors' Office (paper and digital), Education Policy Support	end of student relationship + 6 years, unless the case relates to sexual criminal misconduct which has not been investigated by the police, in which case permanent record	Proctors' Office, Education Policy Support
I.8	Dispensations	Paperwork supporting the dispensations process and recording of outcomes	Application and evidence, correspondence with college/department/DAS	Education Policy Support	End of student relationship + 6 years	Education Policy Support
I.9	General course attempt	Information about a student's course attempt, forming basis of student transcript.	Course, college, start and end dates, enrolment status, enrolment history	SITS & EVision, data warehouse	permanent in master system i.e. SITS/eVision	Student Registry
I.10	On course activities: background	To provide official record of student study	Background documentation for: Registration details; Suspension, Programme transfer; Withdrawal	SITS & EVision, emails, change of circumstances forms, GSO forms - paper and e-forms.	End of student relationship + 6 years	Student Registry
I.11	On course activities: outcomes	Information about a student's change of circumstances, such as programme transfer, suspension of status, withdrawal	Outcomes of Registration details; Suspension; Programme transfer; Withdrawal	SITS & EVision, data warehouse, change of circumstances forms, GSO forms - paper and e-forms.	Outcome of suspension, withdrawal, etc., permanent in master system i.e. SITS/eVision. Otherwise end of student relationship + 6 years. Data held outside of master systems (e.g. paper and e-forms) should be destroyed after use	Student Registry
I.12	Teaching	Information about a student's teaching timetable	dates, times and venues of teaching activities	departmental and college.	End of student relationship + 6 years	departments and colleges
I.13	Tutorials	Information to support colleges to manage tutorials	dates of tutorials, tutor and student details	Oxcort	End of student relationship + 6 years	Colleges

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Student support						
J.1	Disability data	See F4				
J.2	Harassment data	Personal data collected to support the collegiate University's provision of support.	individual's details, information on arrangements put in place to support student	SITS, eVision, data warehouse	End of student relationship + 6 years	Student Welfare and Support Services
J.3	Sexual Harassment and Violence data	Data collected to support the collegiate University's provision of SV support.	Individual's details, case notes, risk analysis, formal disclosures.	Maximizer (CMS)	End of student relationship + 6 years; Formal disclosures indefinitely.	Student Welfare and Support Services
J.4	Sport	Personal data collected to enable OU Sport to provide memberships, facilities and sports club related services for health and performance	Title, gender, name, address, email address, telephone number, date of birth, University College/Department, OU Card number and expiry date, photo, bank account details, sports interests, health goals, training and wellness related data.	On Leisure Management system (Gladstone); in Excel. Paper forms also held until input. Wellbeats & TeamBuildr also process data related to subscribed services.	Membership records: end of student relationship + 1 year, then Alumni relations as subscribed thereafter Blues Awards Records; indefinitely	OU Sport

ID	Sub-category	Purpose	data example	Where processed	Retention Period	Retention Record Owner
Higher Doctorate						
K.1	Application record: Successful candidates	Information to enable panels and judges to determine application outcomes	application form, CV, publication list and covering statement, pre-screening panel reports and judge's reports	SharePoint, emails, paper files	Final application decision + 6 years	Student Registry
K.2	Application record: Unsuccessful candidates	Information to enable panels to determine application outcomes	application form, CV, publication list and covering statement, pre-screening panel reports	SharePoint, emails, paper files	Final application decision + 3 years	Student Registry
K.3	Outcome of award: successful candidates	Details of degree awarded	individual's details, degree awarded	SITS, eVision	Permanent record	Student Registry
K.4	Publication of award: successful candidates	Details of degree awarded	individual's details, degree awarded	University Gazette (public)	Permanent record	Student Registry