STU 80

STUDENT AWARDS AND FINANCIAL ASSISTANCE (UNDERGRADUATE)

RECORDS CLASSIFICATION PLAN AND RETENTION SCHEDULE

URIMC Approved:
September 23, 2013
URIMC Revised:
May 12, 2016
RIM Edits (consistency, typographical, updates, etc.):
October 1, 2015, November 15, 2016 and March 2, 2017

Contact the Records and Information Management Program (Archives and Special Collections, University Library) for more information: https://www.uregina.ca/library/rim/
**STU 80 STUDENT AWARDS AND FINANCIAL ASSISTANCE (UNDERGRADUATE)**

**FUNCTIONAL GROUPING DESCRIPTION**

This function includes records relating to scholarships, bursaries and awards as well as loans and other forms of financial assistance.

STU 80 includes all administrative records created or acquired to manage financial assistance, scholarships, bursaries and awards. All records that relate to or are identified with an individual student will be retained in the Student Cumulative Record (STU 01).

**STU 80 FUNCTIONS LIST**

100   Financial Information and Advice
200   Government Student Loans and Grants
300   Emergency Student Loans
400   Undergraduate Scholarships, Bursaries and Awards

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B – Banner

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**STU 80 STUDENT AWARDS AND FINANCIAL ASSISTANCE (UNDERGRADUATE)**

**FUNCTION 100 – FINANCIAL INFORMATION AND ADVICE**

**FUNCTION DESCRIPTION**

Financial information and advice to assist potential or new students and other provincial governments to plan and prepare for required financial support. Records may include budget planning advice and potential sources of funding such as scholarships or loans. While this information is maintained within other functions for other purposes, it is assembled within STU80-100 for distribution to potential students.

STU80-100 includes all administrative records created or acquired to manage and execute the function of preparing financial information and advice for students. All records that relate to individual students or that in any other way are identified with an individual student will be retained in the Student Cumulative Record (STU 01).

<table>
<thead>
<tr>
<th>Series Number</th>
<th>Series Name</th>
<th>OPR</th>
<th>Official Record Location</th>
<th>Official Record Retention*</th>
<th>Other Copies Retention</th>
<th>Specialized Electronic System</th>
<th>Disposition Guidelines and Related Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>STU80-100-10</td>
<td>Student Budget Planning Compilations</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>5 years</td>
<td>Current year</td>
<td>Information is acquired from various offices of the University of Regina and put together by Enrolment Services to assist potential students. Either a dated web shot or the source document copied to the website would be retained as the official record.</td>
<td></td>
</tr>
</tbody>
</table>

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**URIMC Approved:** September 23, 2013

**URIMC Revised:** May 12, 2016

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**B – Banner**
**STU 80 STUDENT AWARDS AND FINANCIAL ASSISTANCE (UNDERGRADUATE)**

**FUNCTION 200 – GOVERNMENT STUDENT LOANS AND GRANTS**

**FUNCTION DESCRIPTION**

This function documents the University’s role in relation to financial assistance to students by governments including the national and provincial governments in which the student maintains their permanent residence. Records include the student loan agreement and confirmations of registration and course progress.

STU 80-200 includes all administrative records created or acquired to manage and execute the function of financial assistance to students. All records that relate to individual students or that in any other way are identified with an individual student will be retained in the Student Cumulative Record (STU 01).

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</tr>
</thead>
<tbody>
<tr>
<td>STU80-200-10</td>
<td>Government Student Assistance Programs (Canadian) –</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>6 years</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Includes agreements and correspondence with governments confirming registration and progress in courses, etc.</td>
<td></td>
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</tr>
<tr>
<td>STU80-200-20</td>
<td>Government Student Funding (U.S.)</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>6 years</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Includes agreements and correspondence with governments confirming registration and progress in courses, etc.</td>
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STU 80 STUDENT AWARDS AND FINANCIAL ASSISTANCE (UNDERGRADUATE)

FUNCTION 300 – EMERGENCY STUDENT LOANS

FUNCTION DESCRIPTION

This function documents the University’s role in the provision of emergency loans to students.

STU 80-300 includes all administrative records created or acquired to manage and execute the function of the provision of emergency loans. All records that relate to individual students or that in any other way are identified with an individual student will be retained in the Student Cumulative Record (STU 01).

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</tr>
</thead>
<tbody>
<tr>
<td>STU80-300-10</td>
<td>Application and Supporting Documentation</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>SO + 6 years</td>
<td>N/A</td>
<td></td>
<td></td>
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</tbody>
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Includes supporting documentation (i.e., instructions).

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**STU 80 STUDENT AWARDS AND FINANCIAL ASSISTANCE (UNDERGRADUATE)**

**FUNCTION 400 – UNDERGRADUATE SCHOLARSHIPS, BURSARIES AND AWARDS**

**FUNCTION DESCRIPTION**

This function documents the University’s role in the establishment and awarding of scholarships, bursaries and awards. Records include information about each scholarship, bursary and award as well as records that document the process of selecting successful students and communicating with all applicants.

STU 80-400 includes all administrative records created or acquired to manage and execute the function of undergraduate scholarships, bursaries and awards. All records that relate to individual students or that in any other way are identified with an individual student will be retained in the Student Cumulative Record (STU 01).

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<tbody>
<tr>
<td>STU80-400-10</td>
<td>Award Criteria and Information</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>SO +6 years</td>
<td>SO</td>
<td>SAMS</td>
<td>Transfer to Archives.</td>
</tr>
<tr>
<td></td>
<td>Includes all final versions of award setup, terms of reference, gift agreements, dollar value and frequency, cancellation documentation, etc.</td>
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</tr>
<tr>
<td>STU80-400-20</td>
<td>Training</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>SO +2 years</td>
<td>N/A</td>
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<td></td>
<td>Includes training and promotional materials developed to facilitate the application process.</td>
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<tbody>
<tr>
<td>STU80-400-30</td>
<td>Competition</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>6 years</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Includes records that support the defined criteria for each scholarship, bursary or award from application/recommendation to the confirmation from committees of successful recipients</td>
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<tr>
<td></td>
<td>See Tools10-400 for records of Selection Committees.</td>
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</tr>
<tr>
<td>STU80-400-40</td>
<td>Cumulative List of Award Recipients</td>
<td>Enrolment Services</td>
<td>Enrolment Services</td>
<td>SO + 6 years</td>
<td>N/A</td>
<td>N/A</td>
<td>Transfer to Archives.</td>
</tr>
<tr>
<td></td>
<td>List for each award from first recipient to last.</td>
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