

**ALLEN COLLEGE – UNITYPOINT HEALTH  
STANDARD OPERATING PROCEDURE**

Supersedes: 6/02, 2/00, 11/94, 4/89, 10/05  
11/02, 12/10, 12/14, 5/15,  
4/16, 10/19

No: 2-C-800F-01  
Last Review Date: October 2023  
Required Review Date: December 2027  
Administrative Unit: Student Financial Services  
Approved By:

  
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Jared Seliger, PhD, CNMT  
President

**SUBJECT:** Financial Aid Record Access and Confidentiality

**PURPOSE:** To ensure the security and confidentiality of student financial aid records.

**EFFECTIVE FOR:** Student Financial Services Office, staff, and students

**POLICY:** All records and conversations between the aid applicant, parent/spouse, family, and the Student Financial Services Office and/or award committee are confidential and are entitled to the protection ordinarily given a counseling relationship pursuant to Federal regulations, unless the information falls under Title IX, as outlined in SOP #2-S-800-06.

**PROCEDURE:**

1. No public announcements shall be made of amounts awarded to individual students without the student's permission.
2. No information concerning a student's financial aid record may be released outside the Student Financial Services Office or UnityPoint Health Finance Department without permission of the student, and/or the Director of Financial Aid as circumstances may dictate, unless the information falls under Title IV, or Title IX, as outlined in SOP #2-S-800-06.
3. The Director of Financial Aid shall determine whose permission is required for each request for financial aid information.
4. All student financial aid records for the current academic year shall be maintained by the Student Financial Services Office in a secured area. Electronic records are also kept secure.
5. Financial aid records for students that have graduated or withdrawn from Allen College shall be kept in the archive area for a period of not less than three years from the time the student has ceased to be enrolled at Allen College.
6. Financial aid records are destroyed once all U.S. Department of Education mandatory reporting periods have expired and other Federal regulations allow for their destruction.