

## AD4550 PENSION ADMINISTRATION

Records documenting the administration of staff and faculty pensions at the University.

Includes the calculation and administration of pension benefits to individuals once employed at Queen's University and their beneficiaries.

Example documents: removal cards, salary change forms, correspondence.

*University Records exist in both physical and electronic formats, such as paper, email or data in a database. Paper records may or may not contain information that is duplicated in an electronic system. For technical reasons the retention assigned to the electronic records may be different from the retention of physical records.*

### OPR - Director, Pension and Insurance

*(Unless otherwise assigned, see below)*

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
30	Individual Pension Record	ET + 7	93	D	PIB

*Records document the administration of an individuals pension from Queen's University.*

*Example documents: Pension enrollment card, beneficiaries nomination and changes, declaration of marital status sheets, copy of court orders, election of options, pension statements, Advice of Death Payout Certificate of Authorization, add/change notices, salary change notices, change of affiliation status memo.*

*ET Definition: Termination of employment.*

## GLOSSARY

FY = Fiscal Year (May 1 to April 30)

AY = Academic Year (September 1 to August 31)

CY = Calendar Year (January 1 to December 31)

ET = Event Trigger

OPR = Office of Primary Responsibility

DP = Special Disposition Plan

AR = Transfer to Archives

D = Destroy / Delete

PIB = Personal Information Bank

AD4550 was approved on 16/12/2014.