

OP4830 ADMINISTRATION OF QUEEN'S UNIVERSITY STUDENT SHORT-TERM AND GENERAL LOANS

Records documenting the application and issuing of short-term or long-term loans for students studying at the University.

Includes the submission of application material and decisions on the issuing of short-term loans for students in financial need.

Also includes the issuing of short-term loans and the repayment agreement and the management of other loans issued by the university.

Used for the management of the repayment process of the former general loan program.

Not used for the administration of government loans. See OP4810.

Example documents: Loan application forms, evidence of repayment, decisions, repayment agreement, repayment invoice, proof of repayment, 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. If there are differences, see instructions in this schedule for details.

OPR - University Registrar

(Unless otherwise assigned, see below)

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
30	Queen's Short-Term Loan Files	ET + 1	2	DP/D	PIB

ET Definition: Loan paid in full.

Disposition Plan: In cases when a student has not paid the loan in full according to a repayment plan, re-classify the record under -32. Other files to be destroyed according to the schedule.

31	Queen's University General Loan Program Files	ET + 1	2	DP/D	PIB
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ET Definition: Loan paid in full.

Disposition Plan: In cases when a student has not paid the loan in full according to a repayment plan, re-classify the record under -32. Other files to be destroyed according to the schedule.

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

OP4830 was approved on 08/01/2007.

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
32	Default Queen's University Student Loan File	ET + 1	20	D	PIB

ET Definition: A file is created.

This schedule applies to official records. Convenience or duplicate copies of official records should not be kept longer than necessary, and in no event longer than the official copy.

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