

OP4600 ADMINISTRATION OF STUDENT FEES

Records documenting the assessment and payment of student tuition, activity, residence and some incidental fees at the University.

Includes alternate payment arrangements, regular payments, and any student fee refunds or waivers.

Also includes process of obtaining authorization to deduct fees from a bank account, proof of funding from external agencies, and the issuing of specific income tax certificates.

Not used for the awarding of scholarships and bursaries. See OP4700.

Example documents: Fee refund documentation, applications for an alternate payment arrangement, change of debit memo authorization, authorization to deduct student fees from an account, funding letters from external agencies, invoices to external agencies, correspondence etc.

Correspondence includes paper, email and other electronic communication.

OPR - University Registrar

(Unless otherwise assigned, see below)

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
30	Student Accounts Receivable Database (SAR)	ET + 0	0	D	PIB
<i>ET Definition: Student account paid in full and student not registered for 3 years.</i>					
31	Student Fee Assessment	ET + 1	0	D	PIB
<i>Files contain record of student tuition and other incidental fee assessments.</i> <i>ET Definition: Student account paid in full or debt written off. (Note: For student debtors, the transactions of a student who does not pay are kept on the account for 7 years before it can be written off)</i>					
32	Alternate Payment Arrangement	AY + 1	0	D	PIB
<i>Files contain Alternate Payment Arrangement forms. Used for paper records only. Electronic data is a part of Student Accounts Receivable Database. See OP4600-30.</i>					

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

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
33	Student Fee Refund Request	AY + 1	0	D	YES
<i>Files contain Tuition Refund Request forms etc. Used for paper records only. Electronic data is a part of Student Accounts Receivable Database. See OP4600-30.</i>					
34	Debit Memo	AY + 1	0	D	PIB
<i>Files contain Authorization to Deduct Fees from a Chequing Account forms, voided cheques, etc. Used for paper records only.</i>					
35	Tax Certificate Data	FY + 1	6	D	PIB
<i>Include data used for issuing tax certificates (T2202A). Used for electronic records only.</i>					
36	Student Fee Waiver Process	ET + 6	0	D	PIB
OPR - Provost					
<i>Records consist of the submission of a request for a waiver of fees and the documentation of the decision of the Provost (or delegate).</i>					
<i>ET Definition: Student graduates or 4 years of inactivity.</i>					

These records consist of both paper case files and database records. The paper case files may or may not contain material/ information that is duplicated in the electronic system. For technical reasons the retention assigned to the electronic record may be different from the retention of hard copies.

Student Records and Services has responsibility for the accommodating of alternate payment arrangements and implements the Alternate Payment Arrangement (OP4600-32) portion of the schedule.

The Students Accounts Receivable Database is linked to Financial Services, but maintained by the Office of the University Registrar.

Tax certificates are available to students electronically on SOLUS.

GLOSSARY

FY = Fiscal Year (May 1 to April 30) DP = Special Disposition Plan
AY = Academic Year (September 1 to August 31) AR = Transfer to Archives
CY = Calendar Year (January 1 to December 31) D = Destroy / Delete
ET = Event Trigger PIB = Personal Information Bank
OPR = Office of Primary Responsibility