

## OP5200 STUDENT FINANCIAL ADVISING

Records documenting the provision of financial advising for students at the University.

Includes the documentation of financial advising sessions.

Also includes completion of financial assessment sheets and student sample budgets.

Not used for student health and academic counseling.

Not used for academic advising.

Example documents: Advising session notes, 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
40	Student Financial Advising Database	ET + 0	2	D	YES

*ET Definition: Student graduates, or three academic years have passed with no activity since last registration date.*

---

## 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