



Retention and Disposal Schedule

A Guide to Retaining and Disposing of University Records

Developed by the Records Office, Secretariat

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Introduction

Purpose

The purpose of the University's *Retention and Disposal Schedule* is to provide a mechanism for the disposal of the University's records in accordance with its legal obligations as both a private company and a publicly-funded university.

This *Schedule*:

- identifies records that are worth preserving permanently as part of the University's (and the nation's) archival heritage;
- prevents the premature destruction of records which need to be retained for a specified period to satisfy legal, financial and other requirements of public administration; and
- authorises the destruction of those records not required permanently.

Record Formats

The University's *Retention and Disposal Schedule* applies to records created in all formats. In addition to traditional paper records, this includes, but is not limited to records in business systems, maps, plans, photographs, audiovisual records and records created using web 2.0 media.

Digitised Records

For paper records, photographs, negatives or transparencies that have been digitised (i.e. scanned and converted into electronic form), please consult the *Guideline to Managing Digitised Records* for advice on technical specifications, quality checks and the appropriate retention of both paper and digitised documents after the digitising process has taken place.

Retention Periods

All of the retention periods in this *Schedule* are the minimum period for which the sentenced records must be maintained. University records cannot be disposed of prior to the expiration of the appropriate retention period. However, there is no requirement for University records to be destroyed at soon as the minimum retention period expires. Records may be kept for longer periods than specified in this document but no records may be destroyed any sooner than stipulated in this *Schedule*.

Compliance

The University's *Retention and Disposal Schedule* is intended to assist the University meet its recordkeeping obligations as both a private company and a publicly-funded university. With regard to the latter, every effort has been made to ensure the University satisfies the recordkeeping requirements in each of the three states in which the University has been recognised by an Act of Parliament: New South Wales, Queensland and Victoria.

The retention periods in this *Schedule* are drawn from the seven retention and disposal authorities listed below. In instances where retention periods differ between the states, the University has adopted the most severe option. This approach ensures consistency across the University and guarantees that the University complies with its obligations in all three states.

Corporate Records (issued by Information Enterprises Australia Pty Ltd)

ARRM *Australian Records Retention Manual* [2011 Edition – issue date 30 December 2011]

New South Wales (issued by State Records NSW)

GA28 *General Retention and Disposal Authority – Administrative Records* [issued 2007; revised 2012]

GDA23 *General Retention and Disposal Authority – University Records* [issued December 2005; revised 2012]

Queensland (issued by Queensland State Archives)

GRDS *General Retention and Disposal Schedule for Administrative Records* [version 6; approved 5 August 2011]

QDAN601.2 *University Sector Retention and Disposal Schedule* [version 2; 20 July 2009]

Victoria (issued by Public Record Office Victoria)

PROS 02/01 *General Retention & Disposal Authority for the Records for Higher and Further Education Institutions* [variation 5; issued 23 March 2012]

PROS 07/01 *General Retention & Disposal Authority for Records of Common Administrative Functions* [variation 2; issued 28 June 2013]

Normal Administrative Practice

Normal Administrative Practice (NAP) permits the destruction of certain University records that are not required as evidence of business activities. The following material may be considered for destruction under NAP.

Draft copies of reports, correspondence, addresses, speeches, plans or other documents. Drafts should **not** be destroyed if they contain significant decisions, reasons, actions or information that is not recorded in the final form of the document. Such drafts might include policies, statutes or legal documents (including contracts and tenders).

Working papers consisting of rough notes and calculations used solely to assist in the preparation of other records such as correspondence, reports and statistical tabulations. **Exceptions** include working papers for specific projects where they include substantial and valuable information not found elsewhere and thus comprise the substantive record of the project eg. working papers for enterprise bargaining.

Reference material such as **duplicates** of manuals, guidelines, plans etc., provided a master copy has been retained in the record system.

External publications such as newsletters and annual reports from other organisations, and **advertising or promotional material** including brochures, catalogues, price lists and advertising flyers.

Facilitative or transitory items including circulation copies of instructions or internal newsletters (provided a master copy has been retained in the record system), internal distribution lists, formatting documents, unsolicited letters offering goods and services, unsolicited email [spam] and personal email. Note that office diaries, post-it notes and message pads can be destroyed under NAP **unless** they contain information of business activity that is not recorded elsewhere.

NB: Staff should always consider the value of any material prior to destroying it under NAP. Any types of the above material should not be destroyed if it is necessary to give support or context to an existing record, if it is the only record of how a business decision was made or who made the decision and what advice they received, or if it is a draft of a legal document.

Source: *Guideline 8: Normal Administrative Practice* [issued by NSW State Records, 2005]

PROS 07/01 *General Retention & Disposal Authority for Records of Common Administrative Functions* 1.2.7 [issued by Public Records Office Victoria, 28 June 2013]

Part 1: COLLECTION MANAGEMENT

The function of managing collections of art, museum pieces and other objects that are either owned by the University or are on loan to the University.

REF	COLLECTION MANAGEMENT	CLASS	DISPOSAL ACTION	SOURCE
1.1	ACCESS Records relating to the access and use of collections. Includes application for access, access conditions and registers of access.	Temporary	Retain for 6 months after last action.	QDAN601.2/C1
1.2	ACQUISITION Records relating to the acquisition of items for the collection. Includes purchase, negotiation and arrangements.	Permanent	Retain permanently by the university	QDAN601.2/C3
1.3	AUDIT The activity of auditing art, museum pieces and other objects that are either owned by the University or are on loan to the University.	Temporary	Retain for 7 years after last action.	PROS 02/01 5.3.0
1.4	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
1.4.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
1.4.2	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2
1.5	CONSERVATION The activities involved in the preservation, protection, maintenance, restoration and enhancement of property, information resources and artefacts.			
1.5.1	CONSERVATION – MAINTENANCE & STORAGE Records relating to the maintenance and storage of items in a collection. Includes preservation and restoration.	Temporary	Retain for 7 years after last action.	PROS 02/01 5.3.0
1.5.2	CONSERVATION – MONITORING Records relating to monitoring and control of conditions of the exhibitions and storage spaces. Includes temperature, pest and humidity control.	Temporary	Retain for 10 years after last action.	QDAN601.2/C5

1.6	CONTROL Records related to registering and describing items within the collection. Includes catalogues, inventories, electronic control systems, indexes and registers	Permanent	Retain permanently by the university	QDAN601.2/C4
1.7	DISPOSAL Records relating to the disposal of collection items by sale, transfer, conversion to another medium/format, auction, destruction or repatriation.	Permanent	Retain permanently by the university	QDAN601.2/C8
1.8	DONATIONS Records relating to items donated to the university. Includes donations, gifts and bequests.	Permanent	Retain permanently by the university	QDAN601. 2/C2
1.9	EXHIBITIONS The activities associated with using items in displays or exhibitions.			
1.9.1	EXHIBITIONS – CATALOGUE Official exhibition catalogue	Permanent	Retain permanently	GDA23 1.7.2
1.9.2	EXHIBITIONS – CURATING Records relating to the planning and implementation of an exhibition. Includes liaison with donors/lenders, invitations to exhibit.	Temporary	Retain 5 years after last action.	QDAN601.2/C9
1.10	LOANS Records relating to the lending of items to the university for use in its exhibitions/displays or lending items owned by the university to other organisations.	Temporary	Retain for 13 years after contract expires.	QDAN601.2/C10
1.11	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
1.12	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
1.12.1	PLANNING - DEVELOPMENT Records relating to the development of a collection management plan.	Temporary	Retain for 3 years after last action.	GA28 12.20.2
1.12.2	PLANNING - FINAL Records relating to the final approved version of a collection management plan.	Temporary	Retain for 5 years after plan is superseded.	GA28 12.20.1
1.13	POLICY The activities associated with developing and establishing University policies.			

1.13.1	POLICY - DEVELOPMENT Records relating to the development of the university's collection management policy.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
1.13.2	POLICY - FINAL Final approved version of the university's collection management policy.	Temporary	Retain 10 years after policies are superseded	GRDS 15.8.5
1.14	PROCEDURES Procedures relating to collection management.			
1.14.1	PROCEDURES - DEVELOPMENT Records relating to the development of procedures relating to collection management.	Temporary	Retain for 5 years after last action.	GDA23 3.6.8
1.14.2	PROCEDURES - FINAL Final approved versions of manuals, handbooks and directives detailing procedures relating to collection management.	Temporary	Retain for 10 years after procedures are superseded.	GDA23 3.6.6
1.15	REPORTING Reports, including statistical reports, concerning the collection management function within the University.	Temporary	Retain for 7 years after last action.	PROS 02/01 5.3.0
1.16	REVIEWING Records relating to the review of collection management programs and services.	Temporary	Retain 5 years after last action.	GDA23 3.6.8

Part 2: COMMUNITY RELATIONS

The function of establishing a relationship with parties external to the University, including former and future students; other universities; government departments; community, religious, business and sporting groups; and other institutions.

REF	COMMUNITY RELATIONS	CLASS	DISPOSAL ACTION	SOURCE
2.1	ADDRESSES The activity of giving addresses for public relations purposes. Also see PUBLIC LECTURES			
2.1.1	ADDRESSES - OPERATIONAL Final version of addresses on the routine promotion of the University or its services.	Temporary	Retain for 2 years after last action	PROS 07/01 2.1.2
2.1.2	ADDRESSES - STRATEGIC Final versions of addresses outlining the strategic focus of the University or that are historically significant to the University, e.g. the Vice-Chancellor's address to the National Press Club.	Permanent	Retain permanently	PROS 07/01 2.1.1
2.2	ADULT EDUCATION The activities associated with running programs which benefit the broader community. Includes education programs in fitness, health, well-being, behaviour, art, humanities, language, travel and special interest programs. EXCLUDES: non-award courses as they have the same retention periods as award courses.			
2.2.1	ADULT EDUCATION - DELIVERY Records relating to the management and running of continuing education courses	Temporary	Retain for 2 years after last action	GDA23 24.1.2
2.2.2	ADULT EDUCATION – REGISTRATION & RESULTS Enrolment and final grades in continuing education courses	Temporary	Retain for 7 years after last action	GDA23 24.1.1
2.3	ALUMNI The activities associated with providing services to and establishing lifelong relationships with the alumni of the University. All other alumni activities to be classified under the relevant Community Relations heading. eg. alumni fundraising under COMMUNITY RELATIONS - FUNDRAISING, alumni awards under COMMUNITY RELATIONS – PRIZES & AWARDS etc			

2.3.1	ALUMNI – ESTABLISHMENT Records relating to the establishment and ongoing management of alumni chapters and graduate organisations.	Permanent	Retain permanently.	GDA 23 3.1.2
2.3.2	ALUMNI – MEMBER DETAILS Records relating to membership details. Includes names, change of address etc.	Temporary	Retain for 6 months after last action.	QDAN601.2/C11
2.3.3	ALUMNI – REGISTER Master list of alumni members.	Temporary	Retain for 6 months after last action.	QDAN601.2/C12
2.4	CELEBRATIONS & CEREMONIES The activities associated with arranging and managing functions and festivities to honour a particular event, occasion or individual. Includes award functions for staff or students, formal farewells for staff, official openings of buildings, alumni functions.			
2.4.1	CELEBRATIONS & CEREMONIES - ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for celebrations and ceremonies. Includes catering, venue bookings, invitations.	Temporary	Retain for 2 years after last action.	GRDS 1.2.2
2.4.2	CELEBRATIONS & CEREMONIES – ROUTINE Records relating to routine functions that are not of major significance to the history of the University, e.g. receptions, book launches, openings of exhibitions, fundraising dinners, annual award nights.	Temporary	Retain for 5 years after last action.	GA28 2.4.2
2.4.3	CELEBRATIONS & CEREMONIES – SIGNIFICANT Records relating to functions of significant historical interest to the University. Includes farewell for Vice-Chancellor, opening of a new campus or major building. Records include program and guest list.	Permanent	Retain permanently by the university	GRDS 1.2.1
2.5	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
2.5.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
2.5.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4

2.5.3	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2
2.6	CONFERENCES & SEMINARS The activities associated with hosting or attending conferences and seminars.			
2.6.1	CONFERENCES & SEMINARS – ADMINISTRATIVE ARRANGEMENTS Records relating to arrangements for conferences and seminars, whether convened by the University or an external organisation. Includes publicity, catering, venue bookings, invitations.	Temporary	Retain for 2 years after last action.	GRDS 1.3.1
2.6.2	CONFERENCES & SEMINARS – INSTITUTIONAL PRESENTATIONS Papers presented by ACU staff or representatives at external conferences that address the University's policy, strategic direction or new services, products or partnerships.	Permanent	Retain permanently.	PROS 07/01 2.4.4
2.6.3	CONFERENCES & SEMINARS - PROCEEDINGS Master set of transcripts and speeches, proceedings and reports of conferences convened by the University.	Permanent	Retain permanently.	GRDS 1.3.2
2.6.4	CONFERENCES & SEMINARS – STAFF PRESENTATIONS Papers presented by university staff on any topic other than ACU itself.	Temporary	Retain for 2 years after last action.	GA28 2.5.3
2.7	DONATIONS The activities associated with managing items, artefacts or money donated to the university. For records documenting the financial management of such donations, use FINANCIAL MANAGEMENT - DONATIONS			
2.7.1	DONATIONS – MAJOR The activities relating to items donated to the university. Includes donations, gifts and bequests of historical/cultural significance or long-term value.	Permanent	Retain permanently.	GRDS 1.4.1
2.7.2	DONATIONS – MINOR The activities relating to items donated to the university. Includes donations, gifts and bequests not covered in DONATIONS - MAJOR.	Temporary	Retain for 7 years after last action.	GRDS 1.4.2
2.8	ENQUIRIES Records relating to enquiries and correspondence from members of the public seeking information on the university.			
2.8.1	ENQUIRIES - ROUTINE Records relating to routine enquiries and correspondence from members of the public that requires a simple response. Includes information on courses offered by the University, location of campuses, provision of accommodation etc.	Temporary	Retain for 2 years after last action	GRDS 1.5.2

2.8.2	ENQUIRIES - SIGNIFICANT Records relating to enquiries and correspondence from members of the public that requires a detailed response or advice that may have legal significance.	Temporary	Retain for 7 years after last action	GRDS 1.5.1
2.9	EXTERNAL ORGANISATIONS Records relating to ongoing contact between the University and external bodies. Such records tend to be of a general correspondence nature. Records relating to external committees, joint ventures or reports submitted to government departments have their own entries eg. COMMUNITY RELATIONS – JOINT VENTURES.	Temporary	Retain for 5 years after last action	PROS 07/01 2.13.1
2.10	FUNDRAISING The activities associated with organising and managing fundraising campaigns. For the management of money received from such campaigns, see FINANCIAL MANAGEMENT - FUNDRAISING	Temporary	Retain for 5 years after last action	QDAN601.2/C14
2.11	GREETINGS The activity associated with the preparation and sending of letters and cards by the University. Includes letters of appreciation, condolence and congratulations. Also includes Christmas cards. For letters and cards received by the University, use COMMUNITY RELATIONS – PUBLIC REACTION.	Temporary	Destroy when administrative use ceases	GRDS 18.1.9
2.12	JOINT VENTURES Records relating to joint operations between the University and other organisations for the purposes of raising the profile of the University or of a particular service or program. Use GOVERNANCE – JOINT VENTURES for establishing formal teaching alliances with other institutions. Use RESEARCH MANAGEMENT– JOINT VENTURES for collaborative research initiatives.	Temporary	Retain for 5 years after last action	GA28 2.12.1
2.13	MARKETING The activities involved in promoting the University's products and services to clients and potential clients.			
2.13.1	MARKETING – ROUTINE Records relating to routine marketing campaigns. Includes advertising campaigns, public launches and promotional images.	Temporary	Retain for 7 years after last action	PROS 07/01 2.14.2
2.13.2	MARKETING – SIGNIFICANT Records relating to major marketing campaigns. Includes re-branding or major awareness campaigns.	Permanent	Retain permanently	PROS 07/01 2.14.1

2.14	MEDIA RELATIONS The activities associated with establishing a relationship between the university and the media. Includes cultivating media contacts, coordinating access to the media, authorising and issuing press releases and organising media interviews.			
2.14.1	MEDIA RELATIONS – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements with the media. Includes the issuing of media releases, organising interviews, and providing information and assistance to support media coverage of the University.	Temporary	Retain for 2 years after last action	PROS 07/01 2.15.2
2.14.2	MEDIA RELATIONS – PRESS CLIPPINGS Copies of media items relating to the university's operations or events involving the university. Includes news cuttings, transcripts and electronic media items.	Temporary	Retain until administrative use ceases.	PROS 07/01 2.15.3
2.14.3	MEDIA RELATIONS – PRESS RELEASES A master set of all ACU media releases.	Permanent	Retain permanently	PROS 07/01 2.15.1
2.15	MEETINGS Records relating to routine section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
2.16	OPEN DAY Records relating to the planning and management of Open Day.	Temporary	Retain for 2 years after last action	QDAN601.2/C241
2.17	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
2.17.1	PLANNING - DEVELOPMENT Records relating to the development of a community relations plan.	Temporary	Retain for 3 years after last action.	GRDS 15.7.2
2.17.2	PLANNING - FINAL Records relating to the final approved version of a community relations plan.	Temporary	Retain for 5 years after plan is superseded.	GA28 2.16.1
2.18	POLICY The activities associated with developing and establishing University policies.			
2.18.1	POLICY - DEVELOPMENT Records relating to the development of the university's community relations policy.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
2.18.2	POLICY - FINAL Final approved version of the university's community relations policy.	Permanent	Retain permanently.	PROS 02/01 1.1.0

2.19	PRIZES & AWARDS The activity of establishing, administering and managing awards and prizes that are open to people outside the university. Includes art and literary awards, such as the Blake Prize for Religious Art.			
2.19.1	PRIZES & AWARDS – ADMINISTRATIVE ARRANGEMENTS Records related to organisational arrangements for the award. Includes selection process and notification of outcome.	Temporary	Retain for 7 years last action.	PROS 02/01 7.2.0
2.19.2	PRIZES & AWARDS – ESTABLISHMENT Records related to establishing the award.	Permanent	Retain permanently	PROS 02/01 7.1.0
2.19.3	PRIZES & AWARDS – JUDGING PANEL Master list of judges or committee members.	Permanent	Retain permanently	QDAN601.2/C84
2.19.4	PRIZES & AWARDS – RECIPIENTS Master list of all award recipients.	Permanent	Retain permanently	QDAN601.2/C81
2.20	PROCEDURES Procedures relating to the community relations function.			
2.20.1	PROCEDURES - DEVELOPMENT Records relating to the development of procedures for the community relations function.	Temporary	Retain for 3 years after last action.	GA28 2.18.2
2.20.2	PROCEDURES - FINAL Final approved versions of manuals, handbooks and directives detailing procedures relating to the community relations function.	Temporary	Retain for 5 years after procedures are superseded.	GA28 2.18.1
2.21	PUBLIC LECTURES The activities associated with organising and presenting lectures or seminars that are outside the teaching curriculum / short courses and may be attended by members of the community. Includes the Lenten lecture. Use ADDRESSES for speeches by ACU staff promoting the University			
2.21.1	PUBLIC LECTURES – ADMINISTRATIVE ARRANGEMENTS Records relating to arrangements for public lectures. Includes catering, venue bookings, invitations to speak, program.	Temporary	Retain for 2 years after last action	QDAN601.2/C20
2.21.2	PUBLIC LECTURES - TRANSCRIPTS Transcripts of lectures.	Permanent	Retain permanently by the university	QDAN601.2/C21

2.22	PUBLIC REACTION Records relating to letters and cards received by the University. For letters and cards sent by the University, use COMMUNITY RELATIONS – GREETINGS			
2.22.1	PUBLIC REACTION – APPRECIATION LETTERS Records relating to letters of appreciation received by the University.	Temporary	Retain for 2 years after last action	GA28 2.19.2
2.22.2	PUBLIC REACTION – CHRISTMAS CARDS Records relating to Christmas cards received by the University.	Temporary	Retain for 2 years after last action	GA28 2.19.2
2.22.3	PUBLIC REACTION - COMPLAINTS Records relating to letters of complaint received by the University.	Temporary	Retain for 7 years after last action.	GA28 2.19.1
2.22.4	PUBLIC REACTION – CONDOLENCE LETTERS Records relating to letters of condolence received by the University.	Temporary	Retain for 2 years after last action	GA28 2.19.2
2.22.5	PUBLIC REACTION – CONGRATULATIONS LETTERS Records relating to letters of congratulations received by the University.	Temporary	Retain for 2 years after last action	GA28 2.19.2
2.22.6	PUBLIC REACTION - SUGGESTIONS Records relating to suggestion letters received by the University.	Temporary	Retain for 7 years after last action.	GA28 2.19.1
2.23	REPORTING Reports, including statistical reports, concerning the community relations function within the University.			
2.23.1	REPORTING – EXTERNAL Final version of formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
2.23.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
2.24	REVIEWING Records relating to the review of community relations programs and services.	Temporary	Retain 5 years after last action.	GA28 2.21.1
2.25	STUDENT RECRUITMENT The activities designed to attract students to the university.			
2.25.1	STUDENT RECRUITMENT – ADMINISTRATIVE ARRANGEMENTS Records relating to activities designed to attract student applicants.	Temporary	Retain for 2 years after last action	PROS 02/02 14.1.0

2.25.2	STUDENT RECRUITMENT - AGENTS Records relating to the appointment of advertising and recruitment representatives or agencies. Includes agreements.	Temporary	Retain for 7 years after appointment ceases or agreement expires.	QDAN601.2/C23
2.26	SURVEYS Records relating to surveys regarding the University's programs, activities or services.	Temporary	Retain for 7 years after last action	GA28 2.20.1
2.27	VISITS The activities associated with arranging and facilitating visits to the university.			
2.27.1	VISITS – DIGNITARIES Records relating to visits by politicians and other notable figures. Includes any security checks.	Temporary	Retain for 7 years after last action.	GRDS 7.8.1
2.27.2	VISITS – GENERAL PUBLIC Records related to arranging and facilitating visits to university premises by individuals or groups from external organisations or institutions.	Temporary	Retain for 3 years after last action.	GA28 2.23.2

Part 3: FINANCIAL MANAGEMENT

The function of managing the University's financial resources.

REF	FINANCIAL MANAGEMENT	CLASS	DISPOSAL ACTION	SOURCE
3.1	ACCOUNTING The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the agency.			
3.1.1	ACCOUNTING – BANK ACCOUNTS Records documenting the establishment of University bank accounts. Includes records documenting the closure of the account.	Temporary	Retain for 7 years after the account has been closed	GRDS 5.1.5
3.1.2	ACCOUNTING – BANKING ACTIVITIES Records documenting the management of banking activities. Includes deposit books, bank statements, bank reconciliation statements, investments and dividend statements, and records documenting the use of credit cards.	Temporary	Retain for 7 years after the financial year to which the records relate.	GRDS 5.1.6
3.1.3	ACCOUNTING – DEBTS Records relating to the management and settlement of debts, overpayments and material losses. Includes debt recovery and write-offs.	Temporary	Retain for 7 years after the financial year to which the records relate.	GRDS 5.1.12
3.1.4	ACCOUNTING – INCIDENTAL BENEFITS Records documenting the management of incidental benefits received by University personnel eg. frequent flyer points.	Temporary	Retain for 7 years after the financial year to which the records relate.	PROS 07/01 5.1.5
3.1.5	ACCOUNTING – REVENUE & EXPENDITURE Records relating to the payment or receipt of money. Refers to revenue, expenditure, expenses, assets, liabilities and equity. Records include general ledger, journals, subsidiary ledgers, cash books, sales and purchase invoices, receipts, orders for the payment of money, bills of exchange, promissory notes, credit notices, petty cash records, and other records of prime entry.	Temporary	Retain for 7 years after the financial year to which the records relate.	GRDS 5.1.2
3.1.6	ACCOUNTING – TAXATION Records relating to taxation matters. Includes income tax, fringe benefits tax (FBT), goods and services tax (GST), sales tax, payroll tax, fuel tax and pay as you go (PAYG). If the records form the primary record of the University's financial transactions, they should be reclassified and retained as per ACCOUNTING - REVENUE & EXPENDITURE.	Temporary	Retain for 5 years after last action.	GRDS 5.1.15

3.2	ADVICE Records relating to advice that is given or received regarding financial management and accounting practices. Includes financial advice for operational matters such as wage cases and property matters.	Temporary	Retain for 10 years after last action.	GA28 7.2.3
3.3	AGREEMENTS Records relating to the establishment, negotiation, maintenance and review of agreements regarding management of the University's financial resources eg. credit card contracts. Includes internal agreements between sections of the University.	Temporary	Retain for 7 years after agreement has expired or been terminated	GRDS 5.3.1
3.4	ASSET REGISTER Summary record listing all fixed assets owned by the agency	Permanent	Retain permanently	PROS 07/01 5.2.1
3.5	AUDIT Records relating to financial audits.	Temporary	Retain for 7 years after the financial year to which the records relate.	GRDS 5.6.1
3.6	AUTHORISATION Records relating to the process of delegating power to authorise a financial activity. Includes appointment of an officer to countersign cheques, delegation to approve expenditure	Temporary	Retain for 7 years after delegation is superseded	GRDS 5.7.1
3.7	BUDGETING The process of planning the use of expected income and expenditure over a specified period.			
3.7.1	BUDGETING – EXTERNAL APPROVAL Budget estimates and associated records prepared for external approval.	Permanent	Retain permanently	GA28 7.8.1
3.7.2	BUDGETING – OPERATIONAL Budget estimates and associated records produced for internal use by the University.	Temporary	Retain for 7 years after the financial year to which the records relate.	PROS 07/01 5.5.2
3.7.3	BUDGETING – PROGRESS Records relating to the University's spending progress or revenue collection against allocations within the budget estimates.	Temporary	Retain for 2 years after the financial year to which the records relate.	GA28 7.8.3
3.8	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
3.8.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
3.8.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4

3.8.3	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 5.9.1
3.9	COMPLIANCE Records relating to the University's compliance with financial registration requirements. Includes records relating to changes in registration and de-registration. Records may include registration of Australian Business Number (ABN), Australian Company Number (ACN), Data Universal Numbering System Number (DUNS), Tax File Number (TFN).	Temporary	Retain for 7 years after registration lapses or is superseded.	GRDS 5.10.1
3.10	CONTRACTING-OUT The activities involved in arranging, procuring and managing the provision of services by an external contractor or consultant.			
3.10.1	CONTRACTING-OUT – CONSULTANTS & CONTRACTORS The activities associated with managing the use of consultants and contractors by the University.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.1.1 PROS 07/01 3.2.1
3.10.2	CONTRACTING-OUT – CONTRACTS Records of contracts including documents associated with the negotiation process. Excludes tender records.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.3.4
3.10.3	CONTRACTING-OUT – REGISTER A register for all contracts managed by the university.	Permanent	Retain permanently.	PROS 07/01 3.3.1
3.11	DONATIONS Records relating to financial transactions involving gifts, benefits and other reportable items received or donated by the University and/or its officers. Includes approvals, notifications, and terms and conditions.	Temporary	Retain for 7 years after last action.	GRDS 5.14.1
3.12	FINANCIAL STATEMENTS The process of compiling annual statements showing receipts and payments, both actual and budgeted for the current financial year, and the actual amounts received or paid for the previous year.			
3.12.1	FINANCIAL STATEMENTS – ANNUAL Annual financial statements and associated background documentation. Includes balance sheets, operating statements, cash flow statements and accompanying notes.	Permanent	Retain permanently	PROS 07/01 5.6.1
3.12.2	FINANCIAL STATEMENTS – INTERIM Interim financial statements including balance sheets and operating statements. Includes mid-year and quarterly statements	Temporary	Retain for 7 years after the end of the financial year in which the record was created	PROS 07/01 5.6.2

3.13	FUNDRAISING Records relating to the receipt and disbursement of money received through fundraising events and activities.	Temporary	Retain for 7 years after the last action	PROS 07/01 5.8.1
3.14	GRANT FUNDING The activities associated with the application for and administration of grants. Excludes research and teaching grants	Temporary	Retain for 7 years after the last action	GRDS 5.17.1
3.15	LOANS Records relating to the borrowing of money by the University. Includes loan agreements, repayment records, interest rate agreements and other associated records.	Temporary	Retain for 7 years following finalisation of loan.	PROS 07/01 5.13.1
3.16	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
3.17	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
3.17.1	PLANNING - DEVELOPMENT Records relating to the development and review of plans for managing the University's financial services.	Temporary	Retain for 3 years after last action.	GRDS 5.19.2
3.17.2	PLANNING – FINAL Final approved versions of plans for managing the University's financial services.	Temporary	Retain for 5 years after plan is superseded.	GRDS 5.19.1
3.18	POLICY The activities associated with developing and establishing University policies.			
3.18.1	POLICY - DEVELOPMENT Records relating to the development of the University's financial management policies.	Temporary	Retain 3 years after last action.	GRDS 5.20.2
3.18.2	POLICY - FINAL Final approved version of the University's financial management policies.	Permanent	Retain permanently.	PROS 07/01 13.1.2
3.19	PROCEDURES Procedures relating to financial management.			
3.19.1	PROCEDURES - DEVELOPMENT Records relating to the development and review of financial management procedures.	Temporary	Retain for 3 years after last action.	GRDS 5.21.2

3.19.2	PROCEDURES - FINAL Master copy of final approved versions of manuals, handbooks and directives detailing financial management procedures.	Permanent	Retain permanently.	PROS 07/01 5.10.1
3.20	REPORTING Reports, including statistical reports, concerning the financial administration of the University or its divisions and entities.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
3.20.1	REPORTING – EXTERNAL Final version of formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
3.20.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
3.21	REVIEWING Records relating to the review of financial management services.	Temporary	Retain 5 years after last action.	GRDS 5.23.1
3.22	RISK MANAGEMENT Records relating to the identification and assessment of financial management risks. Includes risk register.	Temporary	Retain 7 years after last action.	GRDS 5.24.2
3.23	SALARIES Records relating to the payment of salaries to personnel.	Temporary	Retain 7 years after last action.	PROS 07/01 5.11.1
3.24	TENDERING The activities involved in receiving and assessing tenders for the supply, sale or purchase of goods and services.			
3.24.1	TENDERING – SPECIALTY CONTRACTS Records of specialty contracts. Includes contracts signed under seal.	Temporary	Retain 15 years after contract expires.	PROS 07/01 3.3.3
3.24.2	TENDERING - STANDARD CONTRACTS Records of simple or standard contracts. Excludes contracts signed under seal.	Temporary	Retain 7 years after contract expires.	GRDS 5.11.2
3.24.3	TENDERING - REGISTER Entries in the tender register.	Temporary	Retain for 7 years after last action.	GRDS 5.27.3
3.24.4	TENDERING – TENDERS Records relating to the development, issue and evaluation of tender documentation. Includes request for tender documents, statement of requirements, requests for expression of interests, draft contracts, evaluation reports, recommendations, final reports and public notices.	Temporary	Retain for 7 years after tender process is complete.	GRDS 5.27.1
3.25	TRUST FUNDS The activities associated with maintaining trust funds established by gift/bequest.			

3.25.1	TRUST FUNDS – ACCOUNT MANAGEMENT Records relating to the routine management of University trust funds. Includes periodic reports; batching records; incorrect calculations reports; processing/reporting request forms; trial balances.	Temporary	Retain for 10 years after last action.	QDAN601.2/C355
3.25.2	TRUST FUNDS - ESTABLISHMENT Records relating to the establishment of trust funds established or managed by the University.	Permanent	Retain permanently	QDAN601.2/C25

Part 4: GOVERNANCE

The function of planning, establishing and managing the University's structure and strategic policies and directions.

REF	GOVERNANCE	CLASS	DISPOSAL ACTION	SOURCE
4.1	ACCREDITATION The activity associated with the university seeking institutional accreditation as an educational provider. e.g with the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS)	Permanent	Retain permanently	QDAN601.2/C335
4.2	AUDIT The activities associated with officially checking records to ensure they have been kept and maintained in accordance with agreed or legislated standards			
4.2.1	AUDIT - OPERATIONAL Records relating to internal and external audits of university activities, excluding those conducted by AUQA.	Temporary	Retain for 10 years after last action	GDA23 3.7.1
4.2.2	AUDIT - PREPARATION Records relating to preparation and planning for an AUQA audit.	Temporary	Retain for 1 year after last action	GDA23 3.7.4
4.2.3	AUDIT - QUALITY Records relating to external quality assurance audit by AUQA (Australian Universities Quality Agency). Includes: submissions to AUQA by the university; audit reports; responses by the university to audit reports.	Permanent	Retain permanently	GDA23 3.7.3
4.3	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
4.3.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
4.3.2	COMMITTEES – EXTERNAL Records relating to external committees for which the University does not provide secretariat support. Use COMMITTEES –STRATEGIC if the University does provide Secretariat support.	Temporary	Retain for 5 years after last action.	GA28 1.0.4

4.3.3	COMMITTEES - MEMBERSHIP Records relating to membership of the University's governing bodies. Includes appointments and resignations.	Permanent	Retain permanently	GDA23 3.8.2
4.3.4	COMMITTEES – OPERATIONAL Records relating to the activities of University committees that report to the major committees. Includes school committees, school sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	QDAN601.2/C326
4.3.5	COMMITTEES – STRATEGIC Records relating to committees and boards that manage the University's strategic and core business. Includes Senate, Academic Board, Standing & Finance, and Ethics Committees. Also includes external committees for which the University provides Secretariat support and external Advisory Bodies that have a direct impact on the University's operations.	Permanent	Retain permanently	QDAN601.2/C325
4.4	COMPANY RECORDS Activities relating to Australian Catholic University Limited in its capacity as a corporate entity.			
4.4.1	COMPANY RECORDS - ANNUAL GENERAL MEETING Records relating to the annual general meetings held by ACU Ltd. Includes EGMs.	Permanent	Retain permanently	ARRM COR.06.1
4.4.2	COMPANY RECORDS - ANNUAL RETURNS Annual return of ACU Ltd.	Permanent	Retain permanently	ARRM COR.03
4.4.3	COMPANY RECORDS – CORPORATE REGISTER Corporate registers. Includes registers of directors, secretaries and managers; register of trustees; registers of charges, seal registers.	Permanent	Retain permanently	ARRM COR.02.1
4.4.4	COMPANY RECORDS – INCORPORATION Records relating to the incorporation of the company. Includes Certificates of Incorporation; Memorandum and Articles; Seal Records; Special Licences	Permanent	Retain permanently.	GDA 23 3.1.2
4.4.5	COMPANY RECORDS – SHAREHOLDINGS REGISTER Master list of all shareholders.	Permanent	Retain permanently	ARRM COR.05.5.1
4.5	CORPORATE IDENTITY The activity of identifying, designing and procuring symbols that promote the identity of the university. Includes university name, logo, coat of arms, crest, seal etc.			
4.5.1	CORPORATE IDENTITY – ETHOS Records relating to the University's sense of Catholic identity.	Permanent	Retain permanently	QDAN601.2/C327

4.5.2	CORPORATE IDENTITY – MISUSE Records relating to the misuse of corporate identity. Includes falsified transcripts, fraudulent use of web content.	Temporary	Retain for 7 years after last action	QDAN601.2/C328
4.5.3	CORPORATE IDENTITY – PROTECTION Records relating to protection of the University's identity. Includes registration of seal, trademarks.	Permanent	Retain permanently	QDAN601.2/C329
4.5.4	CORPORATE IDENTITY – SEAL REGISTER Records listing instances where the University seal has been used.	Temporary	Retain for 7 years after last action	QDAN601.2/C330
4.5.5	CORPORATE IDENTITY – SYMBOLS Records relating to the development of symbols and objects reflecting the University's corporate identity. Includes design and format of coat of arms, testamurs, common seal, the University Christmas Card.	Permanent	Retain permanently	QDAN601.2/C327
4.5.6	CORPORATE IDENTITY – USAGE Records relating to applications and approval to use the University's corporate identity objects eg. crest, motto, logo.	Temporary	Retain for 7 years after permission ceases.	QDAN601.2/C331
4.6	ELECTIONS The activity of conducting ballots for electing members of councils, committees and the University senate. Also applies to election for student bodies.			
4.6.1	ELECTIONS - CONDUCT Records relating to the conduct of elections. Includes nominations, ballot papers, tally sheets, appointment of scrutineers.	Temporary	Retain for 1 year after declaration of election result	QDAN601.2/C332
4.6.2	ELECTIONS - ELECTORAL ROLL Records relating to the creation and maintenance of the electoral roll, including the roll itself.	Temporary	Retain for 1 year after declaration of election result	QDAN601.2/C333
4.6.3	ELECTIONS – GUIDELINES Records relating to election policies and procedures.	Permanent	Retain permanently	PROS 02/01 1.1.0
4.6.4	ELECTIONS – RESULTS Record of election results.	Temporary	Retain for 5 years after declaration of election result	QDAN601.2/C334
4.7	INQUIRIES Records relating to the University's contribution and involvement in inquiries, such as Royal Commissions and Parliamentary and Ombudsman inquiries. Includes statements and submissions, responses to final reports, and transcripts of oral evidence given by University staff and representatives. Includes all working and supporting papers.	Permanent	Retain permanently	PROS 07/01 7.5.1

4.8	<p>JOINT VENTURES Records relating to the establishment and monitoring of alliances and joint operations with other institutions. This particularly applies to alliances for the teaching and learning functions. Includes agreements or memorandums of understanding.</p> <p>Use COMMUNITY RELATIONS – JOINT VENTURES for collaborations to lift the profile of either the University or specific programs and initiatives Use RESEARCH MANAGEMENT – JOINT VENTURES for collaborative research initiatives.</p>	Permanent	Retain permanently	GA28 19.11.1
4.9	<p>LEGISLATION Records relating to government legislation and regulations that directly relate to the University's operations and functions</p>	Permanent	Retain permanently	PROS 07/01 7.7.2
4.10	<p>MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.</p>	Temporary	Retain until administrative use ceases.	GA28 19.13.1
4.11	<p>PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.</p>			
4.11.1	<p>PLANNING – DEVELOPMENT Records relating to the development of strategic and operational plans.</p>	Temporary	Retain for 3 years after last action.	GRDS 15.7.2
4.11.2	<p>PLANNING – OPERATIONAL Final approved version of high level plans for the provision of ongoing administrative or operational support. Includes risk management, quality management, disaster recovery and equal employment opportunity plans. Also includes strategic plans for individual organisational units.</p>	Temporary	Retain for 7 years after plan is superseded	GA28 19.14.3
4.11.3	<p>PLANNING – STRATEGIC Final approved version of plans of a strategic nature that apply to the University as a whole. Includes the University's strategic plan, as well as other long-term institutional strategies, such as the mission statement.</p>	Permanent	Retain permanently	GDA23 3.9.2
4.12	<p>POLICY The activities associated with developing and establishing University policies.</p>			
4.12.1	<p>POLICY - DEVELOPMENT Records relating to the development of university policies.</p>	Temporary	Retain 10 years after last action.	GRDS 15.8.2
4.12.2	<p>POLICY - FINAL Final approved version of university policies.</p>	Permanent	Retain permanently.	PROS 02/01 1.1.0

4.13	PROCEDURES Procedures relating to governance. Includes procedures and conduct of university committees and working groups.			
4.13.1	PROCEDURES - DEVELOPMENT Records relating to the development of governance procedures.	Temporary	Retain for 3 years after last action.	GA28 9.14.2
4.13.2	PROCEDURES - FINAL Final approved version of manuals, handbooks or directives detailing procedures relating to governance.	Temporary	Retain for 7 years after procedures are superseded.	GA28 9.14.1
4.14	QUALITY ASSURANCE Activities associated with the planning, implementation and evaluation of quality assurance programs. For quality assurance audits, plans, reports or reviews, see GOVERNANCE – AUDIT, GOVERNANCE – PLANNING etc.			
4.14.1	QUALITY ASSURANCE – CERTIFICATION Records relating to the assessment and certification of the University's quality systems by an external organisation.	Temporary	Retain for 3 years after certification lapses	GA28 19.4.2
4.14.2	QUALITY ASSURANCE – IMPLEMENTATION Records relating to the implementation of quality management systems and monitoring implementation activities.	Temporary	Retain for 3 years after last action	GA28 19.9.2
4.14.3	QUALITY ASSURANCE – MANUAL Master copy of the University's quality assurance manual	Temporary	Retain for 3 years after superseded	GRDS 15.9.4
4.15	REPORTING Reports, including statistical reports, concerning the corporate administration of the University or its divisions and entities.			
4.15.1	REPORTING – ANNUAL REPORTS Master copy of annual reports. Includes reports prepared by faculties and schools, centres and institutes, and the University as a whole.	Permanent	Retain permanently	PROS 02/01 3.1.0
4.15.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
4.15.3	REPORTING – OPERATIONAL Final version of routine formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7

4.15.4	REPORTING – STRATEGIC Formal reports that significantly affect the direction and services of the University. Also includes reports documenting the University’s performance in meeting institutional goals, objectives and performance indicators. Includes Assessment Framework Information Collection (previously Educational Profile) and Research Profile Reporting.	Permanent	Retain permanently	PROS 02/01 3.1.0
4.16	RESTRUCTURING The activities associated with the establishment or review of organisational structures			
4.16.1	RESTRUCTURING - MAJOR Records relating to reviews and restructures affecting the University as a whole, or large sections of the University.	Permanent	Retain permanently	GRDS 3.2.1
4.16.2	RESTRUCTURING - MINOR Records relating to minor reviews and restructures affecting only particular sections of the University and having little effect on the overall functioning of the University.	Temporary	Retain for 10 years after last action	PROS 07/01 18.4.2
4.17	REVIEWING Records relating to the review of programs and services related to governance.			
4.17.1	REVIEWING – MAJOR Records relating to major reviews of functions and activities resulting in changes in policy or procedures.	Permanent	Retain permanently	GRDS 15.10.1
4.17.2	REVIEWING – MINOR Records relating to reviews of minor functions and activities.	Temporary	Retain for 10 years after last action.	GRDS 15.10.2
4.18	RISK MANAGEMENT The activities associated with the identification of risks at a strategic level, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss resulting from an incident. For risk management audits, plans, reports or reviews, use GOVERNANCE – AUDIT, GOVERNANCE – PLANNING etc.			
4.18.1	RISK MANAGEMENT - APPRAISAL Records relating to the identification, assessment and monitoring of risk. Includes each stage of the process.	Temporary	Retain for 7 years after last action.	GRDS 15.11.2
4.18.2	RISK MANAGEMENT - REGISTER Entries in a register of University risks.	Temporary	Retain for 7 years after last action.	GRDS 15.11.3
4.19	STATUTES The establishment and management of University statutes, rules and by-laws.			

4.19.1	STATUTES – BREACHES Records relating to breaches of University statutes, rules and by-laws.	Temporary	Retain for 6 years after last action.	GDA23 3.2.2
4.19.2	STATUTES – BY-LAWS Master set of statutes, rules and by-laws	Permanent	Retain permanently	GDA23 3.3.2
4.19.3	STATUTES – DEVELOPMENT Records relating to the development of University statutes and by-laws.	Temporary	Retain for 10 years after last action.	GDA23 3.3.1

Part 5: HUMAN RESOURCES

The function of managing the University's employees.

REF	HUMAN RESOURCES	CLASS	DISPOSAL ACTION	SOURCE
5.1	ACADEMIC PROMOTIONS The process of offering academic or research staff opportunities for promotion based on personal merit rather than a position vacancy.			
5.1.1	ACADEMIC PROMOTIONS - APPEALS Records relating to the final advice regarding appeals against promotion decisions.	Temporary	Retain for 2 years after appeal period expires	QDAN601.2/C44
5.1.2	ACADEMIC PROMOTIONS - LECTURERS Records relating to the promotion of academic staff below the associate professor level. Includes applications, recommendations, approvals, and advice of decision.	Temporary	Retain for 70 years after date of birth AND 7 years from date of separation	QDAN601.2/C353
5.1.3	ACADEMIC PROMOTIONS - PROFESSORIAL Records relating to the promotion of academic staff at associate professor level and above. Includes applications, recommendations, approvals, and advice of decision.	Permanent	Retain permanently	QDAN601.2/C45
5.1.4	ACADEMIC PROMOTIONS - UNSUCCESSFUL Records relating to unsuccessful applications for promotion.	Temporary	Retain for 1 year after appeal period expires	QDAN601.2/C46
5.2	ADVICE Records relating to advice and assistance given to employees about employment conditions, career, finance, salaries, superannuation etc. For counselling records see HUMAN RESOURCES - COUNSELLING	Temporary	Retain for 7 years after last action.	GA28 15.1.1
5.3	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
5.3.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
5.3.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
5.3.4	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2

5.4	CONTRACTING-OUT The activities involved in arranging, procuring and managing the provision of services by an external contractor or consultant.			
5.4.1	CONTRACTING-OUT – CONSULTANTS & CONTRACTORS The activities associated with managing the use of consultants and contractors by the university.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.1.1 PROS 07/01 3.2.1
5.4.2	CONTRACTING-OUT – CONTRACTS Records of contracts including documents associated with the negotiation process. Excludes tender records.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.3.4
5.4.3	CONTRACTING-OUT – REGISTER Summary records for all contracts managed by the university.	Permanent	Retain permanently.	PROS 07/01 3.3.1
5.5	COUNSELLING Records related to the provision of counselling or professional coaching to staff. Includes employee assistance programs. Includes general administration files as well as personal case files.	Temporary	Retain for 7 years after last action.	PROS 07/01 12.4.1
5.6	EXCHANGE PROGRAM Records relating to arrangements for staff exchanges that provide staff with opportunities to develop, teach or research at another institution while maintaining their substantive appointment.	Temporary	Retain for 2 years after arrangements expire.	QDAN601.2/C53
5.7	GRIEVANCES The activities associated with issues or complaints raised by employees in relation to any workplace action or decision which directly affects them and which they perceive to be unfair or unreasonable.			
5.7.1	GRIEVANCES – FORMAL Records documenting formal grievances including those presented to a panel.	Temporary	Retain for 15 years after last action	PROS 07/01 12.7.3
5.7.2	GRIEVANCES – INFORMAL Records documenting grievances which are handled informally by a line manager or Grievance Registrar. Includes grievances settled by mediation.	Temporary	Retain for 7 years after last action	PROS 07/01 12.7.2
5.7.3	GRIEVANCES – REGISTER Summary documentation of grievances detailing the type of grievance and how resolved.	Permanent	Retain permanently	PROS 07/01 12.7.1
5.8	HONORARY APPOINTMENTS The activities associated with the appointment of individuals to adjunct and honorary positions within the University.			

5.8.1	HONORARY APPOINTMENTS – ACADEMIC Records relating to the appointment of visiting, adjunct and conjoint academics, including fellows.	Temporary	Retain for 7 years after appointment ceases.	GDA23 6.3.1
5.8.2	HONORARY APPOINTMENTS – PROFESSORIAL Records relating to the appointment of adjunct or emeritus professors.	Permanent	Retain permanently	GDA23 6.2.1
5.9	INDUSTRIAL RELATIONS The activities associated in establishing formal relations with the University's employees and their representatives to achieve a harmonious workplace. Includes negotiations conducted to obtain determinations, agreements or awards. Also includes industrial disputes.			
5.9.1	INDUSTRIAL RELATIONS – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for industrial meetings. Includes venue bookings, catering etc.	Temporary	Retain for 2 years after last action.	GRDS 8.5.2
5.9.2	INDUSTRIAL RELATIONS – DISPUTES Records relating to the management of industrial disputes	Permanent	Retain permanently	GRDS 8.3.1
5.9.3	INDUSTRIAL RELATIONS – ENTERPRISE BARGAINING Records relating to enterprise bargaining. Includes negotiation and implementation.	Permanent	Retain permanently	GRDS 8.4.1
5.9.4	INDUSTRIAL RELATIONS – INDUSTRIAL MEETINGS Records relating to ad hoc meetings regarding industrial relations issues. Includes meetings between management and unions or other employee associations. Excludes meetings about enterprise bargaining or industrial disputes.	Temporary	Retain for 7 years after last action.	GRDS 8.5.1
5.9.5	INDUSTRIAL RELATIONS – INSTITUTIONAL APPEALS Records relating to appeals made to an external industrial relations body against a decision or order.	Permanent	Retain permanently	PROS 07/01 8.3.1
5.9.6	INDUSTRIAL RELATIONS – WORKING PAPERS Working papers related to the enterprise bargaining process.	Temporary	Retain for 2 years after last action.	GRDS 8.4.2
5.9.7	INDUSTRIAL RELATIONS – WORKPLACE AGREEMENTS Records relating to industrial and/or workplace agreements pertaining to the University.	Permanent	Retain permanently	PROS 07/01 8.6.1
5.10	LEAVE The process of documenting attendance and administering leave.			

5.10.1	LEAVE – APPLICATIONS Records relating to leave requests. Includes applications for leave and any supporting documentation eg. Sick leave certificates.	Temporary	Retain for 7 years after last action.	GA28 15.7.3
5.10.2	LEAVE – ATTENDANCE Attendance records for all employees. Includes flex sheets, time sheets, attendance sheets, overtime records.	Temporary	Retain for 7 years after last action.	GA28 15.7.4
5.10.3	LEAVE – ROSTERS Records relating to the management of rosters.	Temporary	Retain for 7 years after last action.	PROS 07/01 12.9.4
5.10.4	LEAVE – STUDY Applications and approval for study or professional development leave. Includes reports.	Temporary	Retain for 7 years after last action.	QDAN601.2/C54
5.10.5	LEAVE – SUMMARY Consolidated leave history of each staff member.	Temporary	Retain for 50 years after date of separation from University or when aged 75, whichever is longer.	PROS 07/01 12.9.1 GA28 15.7.1
5.11	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
5.12	MISCONDUCT The activities involved in managing misconduct. Includes investigation, charges, formal inquiries, punishment and appeals.			
5.12.1	MISCONDUCT – EMPLOYEE DISMISSED Records relating to investigations of misconduct that result in dismissal.	Temporary	Retain for 15 years after last action	PROS 07/01 12.10.1
5.12.2	MISCONDUCT – INVESTIGATIONS Records relating to investigations of misconduct that do not result in dismissal.	Temporary	Retain for 10 years after last action	GA28 15.8.2
5.12.3	MISCONDUCT – NO INVESTIGATION Records relating to allegations of misconduct that do not result in an investigation.	Temporary	Retain for 7 years after last action	GA28 15.8.3
5.13	MOVING Records relating to moving and relocation expenses for University employees when paid for by the University. Includes storage expenses.	Temporary	Retain for 7 years after last action	PROS 07/01 12.11.1
5.14	PERFORMANCE MANAGEMENT The activities involved in identifying, evaluating and developing employee work performance to meet the University's overall goals and objectives.			

5.14.1	PERFORMANCE MANAGEMENT – CASE FILE Records relating to the evaluation and review of an employee's performance. Includes development plans, assessment reports, performance agreements, performance counselling.	Temporary	Retain for 7 years after last action	GRDS 11.8.1
5.14.2	PERFORMANCE MANAGEMENT – PROGRAMS Records relating to the administration and implementation of performance management programs. Includes recognition schemes for employees.	Temporary	Retain for 10 years after last action	GA28 15.9.2
5.15	PERSONNEL The activities associated with managing the employment of personnel.			
5.15.1	PERSONNEL – CASE FILE Personal case files of all employees, excluding the Chancellor and Vice Chancellor	Temporary	Retain for 50 years after date of separation from University or when aged 75, whichever is longer	PROS 07/01 12.5.2 GA28 15.4.3
5.15.2	PERSONNEL – HISTORICALLY SIGNIFICANT Personal case files of the Chancellor and Vice-Chancellor.	Permanent	Retain permanently	GA28 15.4.2
5.15.3	PERSONNEL – REGISTER Summary record of all permanent employees.	Permanent	Retain permanently	GRDS 11.5.1
5.15.4	PERSONNEL – WORK PLACEMENT Records relating to volunteers or individuals on work experience placements.	Temporary	Retain for 10 years after last action	GRDS 11.5.6
5.16	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
5.16.1	PLANNING - DEVELOPMENT The development of employment plans, staff development plans or industrial relations plans. Includes succession planning and workforce planning.	Temporary	Retain for 5 years after last action.	PROS 07/01 17.5.1
5.16.2	PLANNING - FINAL The final approved version of employment plans, staff development plans or industrial relations plans. Includes succession planning and workforce planning.	Temporary	Retain for 5 years after plan is superseded.	GRDS 11.9.1
5.17	POLICY The activities associated with developing and establishing University policies.			
5.17.1	POLICY - DEVELOPMENT Records relating to the development of the University's human resources, industrial relations and staff development policies.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
5.17.2	POLICY - FINAL Final approved version of the University's human resources, industrial relations and staff development policies.	Permanent	Retain permanently.	PROS 07/01 13.1.2

5.18	POSITION CLASSIFICATION Records relating to the creation, variation, abolition, transfer or reclassification of positions and assigned duties.	Temporary	Retain for 7 years after the position or assigned duties have been abolished or altered.	PROS 07/01 12.13.1
5.19	PRIZES & AWARDS The activity of establishing, administering and managing awards and prizes open to ACU staff, such as the Award for Outstanding Community Engagement. EXCLUDES awards for teaching or research.			
5.19.1	PRIZES & AWARDS – ADMINISTRATIVE ARRANGEMENTS The activities associated with organising the award. Includes selection process and notification of outcome.	Temporary	Retain for 7 years last action.	QDAN601.2/C43
5.19.2	PRIZES & AWARDS – ESTABLISHMENT The activities associated with establishing the award.	Temporary	Retain for 5 years after award is no longer offered.	QDAN601.2/C42
5.19.3	PRIZES & AWARDS – RECIPIENTS Master list of all award recipients.	Permanent	Retain permanently	QDAN601.2/C261
5.20	PROCEDURES Records relating to procedures for human resources, industrial relations and staff development.			
5.20.1	PROCEDURES - DEVELOPMENT Records relating to the development and maintenance of procedures for human resources, industrial relations and staff development.	Temporary	Retain for 5 years after last action.	GA28 11.10.2
5.20.2	PROCEDURES - FINAL Master set of procedures relating to human resources, industrial relations and staff development. Includes manuals, handbooks, directives.	Temporary	Retain for 10 years after procedures are superseded.	GA28 11.10.1
5.21	RECRUITMENT Records relating to the recruitment process. Includes advertisements, details of position and duty statement, composition of interview panel, applications received, interview and referee questions.	Temporary	Retain for 2 years after last action.	GA28 15.10.1
5.22	REPORTING Reports, including statistical reports, concerning the human resources function within the University.			
5.22.1	REPORTING – EXTERNAL Final version of formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
5.22.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5

5.22.3	REPORTING – STRATEGIC Formal reports that significantly affect the direction and services of the University. Also includes reports documenting the University’s performance in meeting institutional goals, objectives and performance indicators.	Permanent	Retain permanently	PROS 02/01 3.1.0
5.23	REVIEWING Records relating to the review of human resources, staff development or industrial relations programs and services	Temporary	Retain for 5 years after last action.	GA28 15.13.1
5.24	SALARIES Records documenting employees’ salaries. Includes taxation declaration records, group certificates, payroll deduction authorities, records relating to the overpayments, and employee pay history cards.	Temporary	Retain for 50 years after employee’s date of separation from the University.	PROS 07/01 12.15.1
5.25	SECURITY Records relating to character and security checks. Also includes registers and documents on the issuing of security passes and staff cards.	Temporary	Retain for 7 years after administrative use ceases.	PROS 07/01 12.16.1
5.26	SOCIAL CLUB Records relating to interaction between the University and the social club. Includes any support provided by the University. NB: Records of the social club itself are not public records and therefore are not covered by this retention schedule.	Temporary	Retain for 2 years after last action.	GA28 15.15.1
5.27	STAFF DEVELOPMENT The activities involved in encouraging staff to develop their skills and abilities through activities, programs and events to maximise their potential and increase their productivity. Includes induction.			
5.27.1	STAFF DEVELOPMENT – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal training courses. Includes venue bookings, hire of equipment, catering.	Temporary	Retain for 2 years after last action.	GRDS 14.1.8
5.27.2	STAFF DEVELOPMENT – APPRAISAL Records relating to the evaluation and appraisal of staff development training programs, activities and events.	Temporary	Retain for 5 years after last action.	GA28 18.5.1
5.27.3	STAFF DEVELOPMENT – ATTENDANCE Records relating to attendance at internal and external training courses.	Temporary	Retain for 2 years after last action.	PROS 07/01 17.7.4

5.27.4	<p>STAFF DEVELOPMENT – TRAINING Records related to workshops, courses and other activities and events organised by the University. Includes programs, speeches, papers, summaries and any audio-visual training materials.</p>	Temporary	Retain for 5 years after last action.	GRDS 14.1.6
5.28	<p>SUGGESTIONS Suggestions and feedback from staff. Includes staff surveys.</p>	Temporary	Retain for 2 years after last action.	GRDS 11.14.1
5.29	<p>TERMINATIONS Records relating to the management and administration of redundancies. Includes documentation on the selection of positions to be abolished and the process of offering redundancy to staff.</p> <p>Use HUMAN RESOURCES - PERSONNEL for redundancies relating to individual staff members.</p>	Temporary	Retain for 5 years after last action.	GRDS 11.13.1
5.30	<p>TRAVEL Records relating to work-related travel arrangements and bookings for staff. Includes preparing travel itineraries and arrangements for obtaining passports and visas.</p> <p>Use FINANCIAL MANAGEMENT – ACCOUNTING for records relating to payments for airfares, accommodation etc.</p>	Temporary	Retain for 2 years after last action.	PROS 07/01 12.17.1

Part 6: INFORMATION MANAGEMENT

The function of managing the University's information resources. This classification includes library management, records management, publications, Freedom of Information requests and Privacy principles.

REF	INFORMATION MANAGEMENT	CLASS	DISPOSAL ACTION	SOURCE
6.1	ACQUISITION Records relating to purchase of information resources and services. Includes the acquisition of library and records management materials, including orders and subscriptions.	Temporary	Retain 7 years after last action.	PROS 07/01 9.1.1
6.2	AGREEMENTS Records relating to the establishment, negotiation, maintenance and review of agreements regarding the provision of library and records management services. Includes agreements with the National Library, State Records, licencing agreements for thesauri	Temporary	Retain 7 years after expiry of agreements.	GA28 12.2.1
6.3	AUDIT Records relating to the auditing of library and recordkeeping activities and systems.	Temporary	Retain 7 years after last action.	PROS 07/01 9.2.1
6.4	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
6.4.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
6.4.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
6.4.3	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2
6.5	COMPLIANCE Records related to compliance with regulatory and quality standards or requirements.	Temporary	Retain 6 years after last action.	GA28 12.7.1
6.6	CONSERVATION Records relating to ongoing preservation measures for the protection of library and records collections. Includes pest control, monitoring of light, temperature and humidity, etc.	Temporary	Retain 5 years after last action.	GA28 12.8.1

6.7	CONTRACTING-OUT The activities involved in arranging, procuring and managing the provision of services by an external contractor or consultant.			
6.7.1	CONTRACTING-OUT – CONSULTANTS & CONTRACTORS The activities associated with managing the use of consultants and contractors by the university.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.1.1 PROS 07/01 3.2.1
6.7.2	CONTRACTING-OUT – CONTRACT REGISTER Summary records for all contracts managed by the university.	Permanent	Retain permanently.	PROS 07/01 3.3.1
6.7.3	CONTRACTING-OUT – CONTRACTS Records of contracts including documents associated with the negotiation process. Excludes tender records.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.3.4
6.8	CONTROL Records related to creating, maintaining and evaluating control mechanisms for recordkeeping. Includes classification systems, registers indexes and file titling protocols.	Permanent	Retain permanently.	GRDS 9.3.4
6.9	CUSTOMER SERVICE Records related to establishing and administering services to clients. Includes information desk.	Temporary	Retain 2 years after last action.	GA28 12.10.3
6.10	DONATIONS Records associated with managing donations to the University.	Temporary	Retain 7 years after donation is received.	GA28 12.13.1
6.11	ENQUIRIES Records associated with handling enquiries from the public, other universities or government organisations relating to library/records services or holdings.	Temporary	Retain 2 years after last action.	GA28 12.14.1
6.12	FREEDOM OF INFORMATION The activities involved in handling FOI requests under Freedom of Information legislation.	Temporary	Retain 10 years after last action.	GA28 12.6.2
6.13	IMPLEMENTATION Records related to the implementation of databases, applications or systems. Includes the installation, configuration and relocation of equipment and facilities for recordkeeping and library management systems and projects.	Temporary	Retain 7 years after last action.	GA28 12.16.1
6.14	INTELLECTUAL PROPERTY The activities associated with managing the University's intellectual property, and the use of material held by the University in which another party owns the intellectual property.			

6.14.1	INTELLECTUAL PROPERTY – COPYRIGHT Records relating to arrangements concerning the use of intellectual property. Includes correspondence, agreements, formal arrangements, copyright declaration forms. Also includes royalty payments to authors for works where the University was publisher.	Temporary	Retain 7 years after last action.	GRDS 9.7.3 GDA23 23.2.1
6.14.2	INTELLECTUAL PROPERTY – INFRINGEMENTS Records relating to infringements and disputes concerning intellectual property.	Temporary	Retain 10 years after last action.	QDAN601.2/C300
6.14.3	INTELLECTUAL PROPERTY – REGISTRATION Records relating to the registration of intellectual property. Includes application forms, objections, supporting documentation, sealed patent or licence.	Permanent	Retain permanently.	QDAN601.2/C301
6.15	LIBRARY OPERATIONS Records relating to administrative and operational arrangements for library services. Includes loans and any fines/penalties imposed on users.	Temporary	Retain 5 years after last action.	GRDS 9.3.1
6.16	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
6.17	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
6.17.1	PLANNING - DEVELOPMENT The development of a plan relating to libraries, records management, FOI, privacy or publications.	Temporary	Retain for 3 years after last action.	GA28 12.20.2
6.17.2	PLANNING - FINAL The final approved version of plans relating to libraries, records management, FOI, privacy or publications.	Temporary	Retain for 5 years after plan is superseded.	GA28 12.20.1
6.18	POLICY The activities associated with developing and establishing University policies.			
6.18.1	POLICY - DEVELOPMENT Records relating to the development of University policies relating to libraries, records management, FOI, privacy or publications.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
6.18.2	POLICY - FINAL Final approved version of University policies relating to libraries, records management, FOI, privacy or publications.	Temporary	Retain 10 years after policies are superseded	GRDS 15.8.5
6.19	PRIVACY Records associated with complaints or investigations about breaches of privacy.	Temporary	Retain 15 years after last action.	PROS 07/01 9.9.1
6.20	PROCEDURES Procedures relating to libraries, records management, FOI, privacy or publications.			

6.20.1	PROCEDURES - DEVELOPMENT Records relating to the development of procedures concerning libraries, records management, FOI, privacy or publications.	Temporary	Retain for 3 years after last action.	GA28 12.22.2
6.20.2	PROCEDURES - FINAL Final approved version of manuals, handbooks or directives detailing procedures concerning libraries, records management, FOI, privacy or publications.	Temporary	Retain for 5 years after procedures are superseded.	GA28 12.22.1
6.21	PUBLICATIONS Records relating to the drafting, production, marketing and supply of University publications.			
6.21.1	PUBLICATIONS – ACCEPTANCE LETTERS Copies of letters sent to prospective authors advising that their manuscript has been accepted.	Permanent	Retain permanently	QDAN601.2/C78
6.21.2	PUBLICATIONS – ARTICLES (EXTERNAL) Significant articles contributed to journals, magazines, newspapers etc about the University or its functions.	Temporary	Retain for 10 years after last action.	GRDS 13.4.4
6.21.3	PUBLICATIONS – CORPORATE STYLE Records related to guidelines on written style (such as graphic design etc) within the University's documents. Includes designing logos, letterhead, stationery, publications that incorporate the corporate image of the University. Also includes agency style manuals.	Temporary	Retain until superseded.	GRDS 13.1.1
6.21.4	PUBLICATIONS – DISTRIBUTION Records related to the dissemination of publications through sales, deliveries or other customer services. Includes records of the monitoring of distribution, stock lists and address lists.	Temporary	Retain for 5 years after last action.	GRDS 13.2.1
6.21.5	PUBLICATIONS – DRAFTING Records relating to the drafting of University publications. Includes drafts, background information and unused material (such as duplicate photographs).	Temporary	Retain until administrative use ceases.	GRDS 13.3.1
6.21.6	PUBLICATIONS – INTERNAL NEWSLETTERS Master copy of internal university newsletters and other publications.	Temporary	Retain for 5 years after last action.	GRDS 13.4.6
6.21.7	PUBLICATIONS – PRODUCTION AGREEMENTS Records relating to the establishment, negotiation, maintenance and review of agreements regarding the production, marketing, supply or distribution of published materials. Includes correspondence and negotiations, minutes or notes of meetings with stakeholders, final versions of authorised agreements, reviews of agreements.	Temporary	Retain for 7 years after expiry of agreement or 7 years after last action, whichever is longer.	GA28 17.1.1

6.21.8	PUBLICATIONS – PRODUCTION ARRANGEMENTS Records relating to the processes involved in turning material into publication. Includes arrangements for design, art work, printing, layout, typesetting, copying, binding, desktop publishing etc. Includes file copies of relevant quotes and orders.	Temporary	Retain for 5 years after last action.	GRDS 13.4.1
6.21.9	PUBLICATIONS – PUBLISHING AGREEMENTS Agreements with authors, agents and distributors detailing terms and conditions of publication. Includes agreements relating to copyright ownership, royalty payments, licence to publish, amendments or variations and associated correspondence.	Permanent	Retain permanently	QDAN601.2/C78
6.21.10	PUBLICATIONS – REJECTION LETTERS Copies of letters sent to prospective authors advising that their manuscript will not be published.	Temporary	Retain for 5 years after last action.	QDAN601.2/C87
6.21.11	PUBLICATIONS – SUBSIDIARY RIGHTS AGREEMENTS Agreements granting subsidiary rights over works published by the University. Includes amendments or variations and associated correspondence.	Temporary	Retain 12 years after expiry or cancellation of agreement.	QDAN601.2/C80
6.22	RECORDS DISPOSAL Activities associated with the destruction or transfer of records to archives.			
6.22.1	RECORDS DISPOSAL – ARCHIVAL TRANSFER Records documenting the transfer of university records into the custody of a state archival body.	Permanent	Retain permanently.	GRDS 9.4.1
6.22.2	RECORDS DISPOSAL – DESTRUCTION Records documenting the destruction of university records using an authorised retention disposal schedule.	Temporary	Retain 30 years after last action.	PROS 07/01 9.6.4
6.22.3	RECORDS DISPOSAL – RETENTION SCHEDULE Master copy of the university's retention schedule.	Permanent	Retain permanently.	GRDS 9.4.2
6.22.4	RECORDS DISPOSAL – RETRIEVAL Records documenting the retrieval of files from the state archives.	Temporary	Retain 2 years after last action.	GRDS 9.3.6
6.23	REPORTING Reports, including statistical reports, concerning the information management function within the University.	Temporary	Retain for 7 years after last action.	GA28 12.23.1
6.24	REVIEWING Records relating to the review of information management programs and services. Includes a review of storage areas, operational services, information systems, publishing processes.	Temporary	Retain 5 years after last action.	GA28 12.24.1
6.25	SECURITY The activities associated with taking measures to protect information resources from damage or unauthorised access.			

6.25.1	SECURITY – BREACHES Records relating to security breaches affecting information resources.	Temporary	Retain 15 years after last action.	GA28 12.25.1
6.25.2	SECURITY – OPERATIONAL ARRANGEMENTS Records relating to establishing and assigning security processes within library and records management environments. Includes physical security of paper records and library items, as well as intellectual security for information systems.	Temporary	Retain 5 years after last action.	PROS 07/01 9.10.2
6.26	TENDERING The activities involved in receiving and assessing tenders for the supply, sale or purchase of goods and services.			
6.26.1	TENDERING – SPECIALTY CONTRACTS Records of specialty contracts. Includes contracts signed under seal.	Temporary	Retain 15 years after contract expires.	PROS 07/01 3.3.3
6.26.2	TENDERING – STANDARD CONTRACTS Records of simple or standard contracts. Excludes contracts signed under seal	Temporary	Retain 7 years after contract expires.	GRDS 5.11.2
6.26.3	TENDERING – REGISTER Entries in the tender register.	Temporary	Retain for 7 years after last action.	GRDS 5.27.3
6.26.4	TENDERING – TENDERS Records relating to the development, issue and evaluation of tender documentation. Includes request for tender documents, statement of requirements, requests for expression of interests, draft contracts, evaluation reports, recommendations, final reports and public notices.	Temporary	Retain for 7 years after tender process is complete.	GRDS 5.27.1

Part 7: LEGAL SERVICES

The function of providing and managing legal services for the University.

REF	LEGAL SERVICES	CLASS	DISPOSAL ACTION	SOURCE
7.1	ADVICE Records relating to legal advice requested or received. Includes advice from inside and outside the University.	Temporary	Retain for 15 years after last action.	PROS 07/01 10.1.2
7.2	AGREEMENTS The activities associated with the establishment, maintenance, review and negotiation of agreements.			
7.2.1	AGREEMENTS – ROUTINE (NOT UNDER SEAL) Records of contracts for smaller-scale activities which are not under seal. Includes records associated with the negotiation process.	Temporary	Retain for 7 years after contract or agreement has expired.	PROS 07/01 3.3.4
7.2.2	AGREEMENTS– ROUTINE (UNDER SEAL) Records of contracts for smaller-scale activities which are under seal. Includes records associated with the negotiation process.	Temporary	Retain for 15 years after contract or agreement has expired.	PROS 07/01 3.3.3
7.2.3	AGREEMENTS – SIGNIFICANT Records relating to the formulation and execution of contracts for significant University commitments. Includes large scale infrastructure projects, memorandums of understanding, inter-organisational agreements, university-wide workplace agreements and intellectual property agreements such as patents.	Permanent	Retain permanently	PROS 02/01 4.2.0
7.3	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
7.3.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
7.3.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
7.3.3	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2

7.4	COMPLIANCE Records relating to the University's compliance with standards or statutory requirements relating to the provision of legal services eg. Quality System Guidelines AS/NZS ISO 9001:1994 for the legal profession.	Temporary	Retain for 6 years after last action.	GA28 13.3.1
7.5	DISCOVERY Records relating to the management of subpoenas and discovery orders. Includes detailed lists and copies of records found.	Temporary	Retain for 7 years after last action.	PROS 07/01 10.4.3
7.6	INQUIRIES Records relating to the University's contribution and involvement in inquiries, such as Royal Commissions and Parliamentary and Ombudsman inquiries. Includes statements and submissions, responses to final reports, and transcripts of oral evidence given by University staff and representatives. Includes all working and supporting papers.	Permanent	Retain permanently	PROS 07/01 7.5.1
7.7	INTELLECTUAL PROPERTY The activities associated with managing the University's intellectual property, and the use of material held by the University in which another party owns the intellectual property.			
7.7.1	INTELLECTUAL PROPERTY – COPYRIGHT Records relating to arrangements concerning the use of intellectual property. Includes correspondence, agreements, formal arrangements, copyright declaration forms. Also includes royalty payments to authors for works where the University was publisher.	Temporary	Retain 7 years after last action.	GRDS 9.7.3 GDA23 23.2.1
7.7.2	INTELLECTUAL PROPERTY – INFRINGEMENTS Records relating to infringements and disputes concerning intellectual property.	Temporary	Retain 10 years after last action.	QDAN601.2/C300
7.7.3	INTELLECTUAL PROPERTY – REGISTRATION Records relating to the registration of intellectual property. Includes application forms, objections, supporting documentation, sealed patent or licence.	Permanent	Retain permanently.	QDAN601.2/C301
7.8	LITIGATION The process of taking or defending actions with a court of law. Includes prosecution, defence and mediation.	Permanent	Retain permanently	PROS 02/01 4.1.0
7.9	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
7.10	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			

7.10.1	PLANNING – DEVELOPMENT Records relating to the development and review of plans for the University's legal programs and services.	Temporary	Retain for 3 years after last action.	GA28 13.5.2
7.10.2	PLANNING – FINAL Final, approved versions of plans for the University's legal programs and services.	Temporary	Retain for 5 years after plan is superseded	GA28 13.5.1
7.11	POLICY The activities associated with developing and establishing University policies.			
7.11.1.	POLICY – DEVELOPMENT Records relating to the development of policies concerning the Universities legal program and services.	Temporary	Retain for 3 years after last action.	GA28 13.6.2
7.11.2	POLICY – FINAL The final approved version of policies for the University's legal programs and services.	Permanent	Retain permanently.	PROS 02/01 1.1.0
7.12	PROCEDURES Procedures relating to the University's legal programs and services.			
7.12.1	PROCEDURES – DEVELOPMENT Records relating to the development of procedures for the University's legal program and services.	Temporary	Retain for 3 years after last action.	GA28 13.7.2
7.12.2	PROCEDURES – FINAL Final approved versions of procedures for the University's legal program and services.	Temporary	Retain for 5 years after procedures are superseded	GA28 13.7.1
7.13	REPORTING Records relating to formal reports regarding legal services programs and services. Includes background research; draft versions of reports containing significant changes or that were formally circulated for comment; and final approved versions of reports.	Temporary	Retain for 7 years after last action.	GA28 13.8.1
7.14	REVIEWING Records relating to reviews of the University's legal programs and services.	Temporary	Retain for 5 years after last action.	GA28 13.10.1
7.15	WHISTLEBLOWERS Records relating to the handling of disclosures made under Public Interest Disclosure (Whistleblower) legislation.	Permanent	Retain permanently	PROS 07/01 10.6.1

Part 8: OCCUPATIONAL HEALTH & SAFETY

The function of managing work and study environments in accordance with occupational health and safety standards and legislation.

REF	OCCUPATIONAL HEALTH & SAFETY	CLASS	DISPOSAL ACTION	SOURCE
8.1	<p>ACCIDENTS The activities involved in dealing with accidents causing death or injury. Includes death or injury to an employee while coming to, at, or leaving work, or to the general public or visitors while on University premises.</p> <p>For accidents resulting in damage to University property, vehicles or equipment, see PROPERTY MANAGEMENT - ACCIDENTS</p>			
8.1.1	<p>ACCIDENTS - FATALITIES Records relating to incidents where the death of an employee or contractor has occurred as the result of an incident in the workplace or while travelling for the purposes of employment (while on duty or official business), or where the death of a student or visitor has occurred as the result of an incident on University premises.</p>	Permanent	Retain permanently	PROS 07/01 11.1.1
8.1.2	<p>ACCIDENTS – FIRST AID Records relating to the provision of first aid treatment. Includes first aid register of injuries and treatment given.</p>	Temporary	Retain for 7 years after last action.	GA28 14.1.1
8.1.3	<p>ACCIDENTS – INJURIES Records relating to incidents where personal injury or incapacity of an employee or contractor has occurred as the result of an incident in the workplace or while travelling for the purposes of employment (while on duty or official business), or has occurred to a student or visitor as the result of an incident on University premises.</p>	Temporary	Retain for 75 years after last action.	GA28 14.1.1
8.1.4	<p>ACCIDENTS – REGISTER (FATALITIES) A register of any fatalities at the University.</p>	Permanent	Retain permanently	PROS 07/01 11.1.1
8.1.5	<p>ACCIDENTS – REGISTER (FIRST AID) A register of any first aid treatment at the University.</p>	Temporary	Retain for 7 years after last entry.	PROS 07/01 11.1.6
8.1.6	<p>ACCIDENTS – REGISTER (INJURIES) A register of any injuries at the University.</p>	Temporary	Retain for 75 years after last action.	GA28 14.1.6
8.2	<p>ADVICE Records relating to the receipt and provision of advice on the OH&S function.</p>	Temporary	Retain for 7 years after last action.	PROS 07/01 11.2.1
8.3	<p>AUDIT Records documenting the planning and conduct of internal or external audits of the OH&S function. Includes copies of the final report and records documenting changes made to procedures as a result of an audit.</p>	Temporary	Retain for 7 years after audit was undertaken.	PROS 07/01 11.4.1

8.4	AWARENESS PROGRAMS The process of promoting programs which encourage the establishment and maintenance of a healthy working environment.			
8.4.1	AWARENESS PROGRAMS – HAZARDOUS MATERIALS Records relating to materials safety information. Includes Material Safety Data Sheets (MSDS) registers.	Temporary	Retain for 75 years after administrative use has concluded.	GA28 14.5.3
8.4.2	AWARENESS PROGRAMS – HEALTH & WELLBEING Records relating to the administration and management of programs to promote a healthy work environment, such as immunisation and health monitoring programs. Also includes activities associated with overall health and wellbeing, including massage programs and yoga classes.	Temporary	Retain for 7 years after last action.	GA28 14.5.4
8.4.3	AWARENESS PROGRAMS – SAFE WORK PRACTICES Records documenting the promotion of safe working practices in the workplace. Includes the development and distribution of notices, instructions, posters and other promotional material.	Temporary	Retain for 5 years after administrative use has concluded.	PROS 07/01 11.7.1
8.5	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
8.5.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
8.5.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
8.5.3	COMMITTEES – OPERATIONAL Records relating to the activities of the University's OH&S committees.	Temporary	Retain for 70 years after last action.	GRDS 17.2.3
8.6	COMPENSATION The activities associated with providing compensation to personnel and visitors injured while proceeding to or from work, during work hours or on the University's premises. Includes the rehabilitation of injured workers.			
8.6.1	COMPENSATION - FATALITIES Records relating to compensation for the death of an employee or visitor where liability is with the University.	Permanent	Retain permanently	PROS 07/01 11.5.3
8.6.2	COMPENSATION – INJURIES (STAFF) Records relating to an employee's claims for workers' compensation where an incident has resulted in serious personal injury or incapacity.	Temporary	Retain for 60 years after last action.	GA28 3.2.1

8.6.3	COMPENSATION – INJURIES (VISITORS) Records relating to compensation claims for personal injury made by members of the public, including students.	Temporary	Retain for 15 years after last action.	GA28 3.2.1
8.7	COMPLIANCE Records relating to the University's compliance with OH&S requirements.			
8.7.1	COMPLIANCE - BREACHES Records relating to compliance with court orders or notices issued by regulatory bodies in connection with OH&S breaches.	Temporary	Retain for 10 years after last action	GA28 14.4.6
8.7.2	COMPLIANCE – HAZARDOUS MATERIALS Records relating to monitoring and surveillance of hazardous substances or conditions. Includes asbestos.	Temporary	Retain for 75 years after last action	GA28 14.4.3
8.7.3	COMPLIANCE - LEGISLATIVE Records relating to compliance with provisions under OH&S legislation.	Temporary	Retain for 7 years after last action	PROS 07/01 11.6.1
8.7.4	COMPLIANCE - LICENCES Records relating to the application for, and management of, licences and permits issued under OH&S legislation.	Temporary	Retain for 10 years after last action	PROS 07/01 11.6.2
8.7.5	COMPLIANCE - REGISTER Hazardous substances register.	Temporary	Retain for 100 years after last action	PROS 07/01 14.11.7
8.8	ELECTIONS Records relating to the election of OH&S representatives to committees. Includes ballot papers and nominations.	Temporary	Retain for 2 years after election.	GA28 14.11.1
8.9	INSPECTIONS Official examinations of facilities, equipment and items for OH&S purposes.			
8.9.1	INSPECTIONS – FATALITIES Records relating to OH&S inspections resulting from a major accident in the workplace in which there was a fatality.	Permanent	Retain permanently	PROS 07/01 11.8.1
8.9.2	INSPECTIONS – HAZARDOUS MATERIALS Records relating to routine inspections of hazardous substances in the workplace to ensure or check their compliance with regulations, standards etc for their management and use.	Temporary	Retain for 75 years after last action.	GA28 14.6.1
8.9.3	INSPECTIONS – INJURIES Records relating to OH&S inspections resulting from a major accident in the workplace in which there was a serious injury.	Permanent	Retain permanently	PROS 07/01 11.8.1
8.9.4	INSPECTIONS – ROUTINE Records relating to routine inspections of work sites.	Temporary	Retain for 10 years after last action.	PROS 07/01 11.8.3

8.10	INSTITUTIONAL APPEALS Records relating to an appeal made by the University for a review of a decision made under occupation health and safety legislation. Includes appeals against a decision made by a Workcover investigator.	Temporary	Retain for 10 years after appeal has concluded.	PROS 07/01 11.3.1
8.11	INSURANCE Insurance policies taken out by the University against claims for personal injury or property damage eg. workers compensation insurance, professional indemnity insurance. Includes renewal notices.	Temporary	Retain for 7 years after expiry or cancellation of policy.	GRDS 2.3.2
8.12	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
8.13	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
8.13.1	PLANNING - DEVELOPMENT Records relating to the development of the University's OH&S plans. Includes plans for asbestos management, emergency evacuation etc	Temporary	Retain for 5 years after last action.	GA28 14.7.2
8.13.2	PLANNING - FINAL The final approved version of the University's OH&S plans. Includes plans for asbestos management, emergency evacuation etc.	Temporary	Retain for 10 years after plan is superseded.	PROS 07/01 11.9.1
8.14	POLICY The activities associated with developing and establishing University policies.			
8.14.1	POLICY – DEVELOPMENT Records relating to the development and review of the University's OH&S policies.	Temporary	Retain for 5 years after last action.	GA28 14.8.3
8.14.2	POLICY – FINAL Final, approved version of the University's OH&S policies.	Temporary	Retain for 75 years after policies are superseded.	GRDS 17.4.1
8.15	PROCEDURES Procedures related to OH&S practices.			
8.15.1	PROCEDURES – DEVELOPMENT Records relating to the development of the University's OH&S procedures.	Temporary	Retain for 5 years after last action.	GA28 14.9.3
8.15.2	PROCEDURES – FINAL Final approved versions of the University's OH&S procedures.	Temporary	Retain for 75 years after procedures are superseded.	GRDS 17.4.1

8.16	<p>REHABILITATION Records documenting the rehabilitation of workers to full employment that are NOT related to a compensation case. Includes return to work plans.</p> <p>For compensation cases see OCCUAPTIONAL HEALTH & SAFETY - COMPENSATION</p>	Temporary	Retain for 50 years after completion of rehabilitation.	PROS 07/01 11.10.1
8.17	<p>REPORTING Reports, including statistical reports, concerning the OH&S function within the University.</p>	Temporary	Retain for 7 years after last action.	GA28 14.10.1
8.18	<p>REPRESENTATIVES Records relating to the nomination, appointment, resignation and termination of first aid officers, fire wardens and safety officers. Includes letters of appointment/resignation, details of roles and responsibilities.</p> <p>For the election of representatives to OH&S committees, see OCCUPATIONAL HEALTH & SAFETY - ELECTIONS</p>	Temporary	Retain for 7 years after last action.	GRDS 17.2.1
8.19	<p>REVIEWING Records relating to reviews of OH&S programs and services.</p>	Temporary	Retain for 10 years after review has occurred.	PROS 07/01 11.9.2
8.20	<p>RISK MANAGEMENT The activities involved in identifying risks and hazards, and the implementation of appropriate practices and procedures to treat the risks.</p>			
8.20.1	<p>RISK MANAGEMENT – HAZARDOUS MATERIALS Records related to risk management of OH&S hazards, including hazardous substances, where risk assessments indicate a risk to employees and where health surveillance and/or monitoring of employees is necessary.</p>	Temporary	Retain for 100 years after last action.	PROS 07/01 11.12.1
8.20.2	<p>RISK MANAGEMENT – LOW RISK Records related to risk management of OH&S hazards not covered by RISK MANAGEMENT – HAZARDOUS MATERIALS. Includes instances where there is minimal or no risk, and surveillance or monitoring may or may not be required.</p>	Temporary	Retain for 30 years after last action.	GA28 14.13.2

Part 9: PROPERTY MANAGEMENT

The function of managing the University's land, buildings, vehicles and other infrastructure.

REF	PROPERTY MANAGEMENT	CLASS	DISPOSAL ACTION	SOURCE
9.1	ACCIDENTS The activities involved in dealing with traffic accidents, damaged buildings and damaged equipment.			
9.1.1	ACCIDENTS – BUILDINGS & LAND Records of accidents and damage occurring to property.	Temporary	Retain 7 years after last action.	PROS 07/01 14.1.1
9.1.2	ACCIDENTS – EQUIPMENT Records of accidents and damage occurring to equipment and stores.	Temporary	Retain 7 years after last action.	PROS 07/01 14.1.1
9.1.3	ACCIDENTS – VEHICLES The activities involved in dealing with traffic accidents.	Temporary	Retain 7 years after last action.	GRDS 6.1.1
9.2	ACQUISITION Records relating to the purchase of property, vehicles, equipment and other items where there is no tendering or contracting-out process.			
9.2.1	ACQUISITION – BUILDINGS & LAND Records relating to the purchase of buildings and land.	Permanent	Retain permanently.	PROS 07/01 14.2.1
9.2.2	ACQUISITION – EQUIPMENT Records relating to the purchase of equipment and stores.	Temporary	Retain 7 years after last action.	PROS 07/01 4.1.1
9.2.3	ACQUISITION – VEHICLES Records relating to the purchase of vehicles.	Temporary	Retain 7 years after last action.	PROS 07/01 6.2.1
9.3	ALLOCATION The process of assigning equipment and stores to employees or business units. Includes requisitions and records of issue.	Temporary	Retain 2 years after last action.	GRDS 4.2.1
9.4	ALLOWANCES Records relating to payments to individuals relating to the use of vehicles.	Temporary	Retain 7 years after last action.	PROS 07/01 12.2.1
9.5	ASSET DELIVERY Records documenting arrangements for the delivery of equipment and stores.	Temporary	Retain 2 years after last action.	GA28 5.4.1
9.6	AUDIT Records related to audits of property, vehicles, equipment and stores.	Temporary	Retain 6 years after last action.	GA28 16.3.2
9.7	AUTHORISATION Records related to seeking and granting permission to use University vehicles.	Temporary	Retain 7 years after last action.	GA28 8.4.1

9.8	BOOKINGS Records related to vehicle bookings.			
9.8.1	BOOKINGS – VEHICLES Vehicle booking records.	Temporary	Retain 2 years after last action.	GRDS 6.4.1
9.8.2	BOOKINGS – LOG BOOKS Vehicle running sheets and log books. Includes records generated by GPS (Global Positioning Systems)	Temporary	Retain 5 years after last action.	GA28 8.3.2
9.9	COMMEMMORATION Records relating to the establishment, design, erection, management and removal of memorial plaques, monuments, benches, fountains, building names etc.	Permanent	Retain permanently.	QDAN601.2/C66
9.10	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
9.10.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
9.10.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
9.10.3	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2
9.11	CONSERVATION The activities involved in the preservation, protection, restoration and enhancement of properties, including buildings and land. Includes Environmental Impact Statements. Also includes sites of heritage significance.	Permanent	Retain permanently.	GRDS 12.2.1
9.12	CONSTRUCTION Records documenting construction activities. See also RENOVATIONS and FIT-OUTS	Permanent	Retain permanently.	PROS 07/01 14.4.1
9.13	CONTRACTING-OUT The activities involved in arranging, procuring and managing the provision of services by an external contractor or consultant.			
9.13.1	CONTRACTING-OUT – CONSULTANTS & CONTRACTORS The activities associated with managing the use of consultants and contractors by the university.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.1.1 PROS 07/01 3.2.1

9.13.2	CONTRACTING-OUT – CONTRACTS Records of contracts including documents associated with the negotiation process. Excludes tender records.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.3.4
9.13.3	CONTRACTING-OUT – REGISTER Summary records for all contracts managed by the university.	Permanent	Retain permanently.	PROS 07/01 3.3.1
9.14	DISPOSAL Activities associated with the disposal of property, vehicles, assets, equipment and stores.			
9.14.1	DISPOSAL – BUILDINGS & LAND Records relating to the disposal of buildings and land. Includes sale, transfer, auction, exchange, return or destruction.	Permanent	Retain permanently.	PROS 07/01 14.5.1
9.14.2	DISPOSAL – EQUIPMENT Records relating to the disposal of equipment and stores owned by the University. Includes sale, transfer, auction, exchange, return or destruction.	Temporary	Retain 7 years after last action.	GRDS 4.3.1
9.14.3	DISPOSAL – VEHICLES Records relating to the disposal of vehicles. Includes sale, transfer, auction, exchange, return or destruction.	Temporary	Retain 7 years after last action.	GRDS 6.5.1
9.15	FIT-OUTS Records relating to the refurbishing of a workplace that does not affect the overall structure of the property. Includes painting, floor coverings, furnishings, furniture, partitions, and wall fittings.			
9.15.1	FIT-OUTS - ASBESTOS Fit-outs where asbestos was present.	Temporary	Retain 100 years after property is disposed of.	PROS 07/01 14.6.2
9.15.2	FIT-OUTS - ROUTINE Routine fit-outs (where no asbestos was present).	Temporary	Retain 15 years after last action.	PROS 07/01 14.6.1
9.16	FLORA & FAUNA The activities concerned with the handling and management of flora and fauna. Includes plant/animal registers and surveys.			
9.16.1	FLORA & FAUNA – ENDANGERED Records relating to management of endangered species.	Temporary	Retain 10 years after last action.	GDA23 7.3.4
9.16.2	FLORA & FAUNA – NATIVE Records relating to management of native flora and fauna.	Temporary	Retain 2 years after last action.	GDA23 7.3.2
9.16.3	FLORA & FAUNA – PROTECTED Records relating to management of protected flora and fauna.	Temporary	Retain 2 years after last action.	GDA23 7.3.1

9.17	FOOD SERVICES The activity of providing food outlets to the university community.			
9.17.1	FOOD SERVICES – INCIDENTS Records relating to incidents of food poisoning or contamination.	Temporary	Retain 3 years after last action.	QDAN601.2/C28
9.17.2	FOOD SERVICES – LICENCES Records relating to the licencing of the university to operate a food business. Includes liquor licence.	Temporary	Retain 7 years after last action.	QDAN601.2/C27
9.17.3	FOOD SERVICES – MONITORING Records associated with monitoring the operation of equipment, services, infrastructure or systems. Includes food temperature logs and refrigerator temperature logs.	Temporary	Retain 1 year after last action.	QDAN601.2/C30
9.17.4	FOOD SERVICES – REGISTRATION Records relating to the registration of university facilities as food premises.	Temporary	Retain 3 years after last action.	QDAN601.2/C63
9.18	INSTALLATION Records relating to the installation and modification of utilities. Includes air-conditioning, ventilation, lighting, etc.	Temporary	Retain 5 years after last action.	GRDS 12.7.5
9.19	INSURANCE The process of taking out insurance policies to cover loss or damage to property, vehicles and assets, and to cover the university against another organisation's property as well as injury to employees or visitors. Includes records relating to insurance claims, insurance policies, insurance register and policy renewals.	Temporary	Retain 7 years after last action.	GRDS 2.2.1 GRDS 2.2.2 GRDS 2.3.2
9.20	INVENTORY Inventories of equipment and stores held by the university.	Temporary	Retain until superseded.	GRDS 4.5.1
9.21	KEYS Records relating to keys and lock combinations. Includes key registers.	Temporary	Retain until superseded.	GA28 5.19.2
9.22	LEASES The activities involved in leasing accommodation, premises, real estate, vehicles or equipment.	Temporary	Retain for 7 years after last action.	GRDS 12.5.1 GA28 5.12.1 PROS 07/01 6.7.1
9.23	MAINTENANCE The activities associated with the upkeep, repair and preservation of vehicles, buildings, assets, equipment and stores.			

9.23.1	MAINTENANCE – BULDINGS & LAND Records relating to repairs and ongoing maintenance of buildings and grounds. Includes energy management and water cooling towers.	Temporary	Retain for 7 years after last action.	PROS 07/01 14.11.9
9.23.2	MAINTENANCE – EQUIPMENT Records relating to repairs and ongoing maintenance of equipment. Includes service and maintenance records.	Temporary	Retain for 7 years after last action.	PROS 07/01 4.5.1
9.23.3	MAINTENANCE – VEHICLES Records relating to repairs and ongoing maintenance of vehicles. Includes servicing records.	Temporary	Retain for 2 years after last action.	PROS 07/01 6.8.1
9.24	MAPS Master copies of maps of the university.	Permanent	Retain permanently	GDA23 7.4.1
9.25	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
9.26	MOVING Records relating to the relocation of a campus, business unit or workgroup. Includes inventories, costings and removalist records.	Temporary	Retain for 7 years after last action.	PROS 07/01 14.12.1
9.27	NAMING Records relating to the naming of premises, buildings, grounds or other physical features.	Permanent	Retain permanently.	QDAN601.2/C67
9.28	PEST CONTROL Records relating to pest and infestation control.	Temporary	Retain for 7 years after last action.	GRDS 12.7.3
9.29	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
9.29.1	PLANNING - DEVELOPMENT The development of a plan to support property management.	Temporary	Retain for 3 years after last action.	GA28 16.18.3
9.29.2	PLANNING - FINAL The final approved version of a plan to support property management.	Temporary	Retain for 5 years after plan is superseded.	GA28 16.18.2
9.30	POLICY The activities associated with developing and establishing University policies.			
9.30.1	POLICY - DEVELOPMENT Records relating to the development of university policies on property matters.	Temporary	Retain 10 years after last action.	GRDS 15.8.2

9.30.2	POLICY - FINAL Final approved versions of university policies on property matters.	Permanent	Retain permanently.	QDAN601.2/C72
9.31	PROCEDURES Procedures relating to property management.			
9.31.1	PROCEDURES - DEVELOPMENT Records relating to the development of property management procedures.	Temporary	Retain for 3 years after last action.	GA28 16.20.2
9.31.2	PROCEDURES - FINAL Final approved version of manuals, handbooks or directives detailing procedures relating to property management.	Temporary	Retain for 5 years after procedures are superseded.	GA28 16.20.1
9.32	RENOVATIONS Records relating to structural renovations of University-owned buildings.	Permanent	Retain permanently.	PROS 07/01 14.4.1
9.33	REPORTING Reports, including statistical reports, concerning the property management function within the University.			
9.33.1	REPORTING – EXTERNAL Final version of routine formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
9.33.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
9.33.3	REPORTING – STRATEGIC Formal reports that significantly affect the direction and services of the University. Also includes reports documenting the University's performance in meeting institutional goals, objectives and performance indicators.	Permanent	Retain permanently	PROS 02/01 3.1.0
9.34	REVIEWING Records relating to internal or external reviews of property management processes, programs and services.	Temporary	Retain 5 years after last action.	GA28 16.22.1
9.35	SECURITY The activities associated with taking measures to protect University resources from damage or unauthorised access.			
9.35.1	SECURITY – MAJOR INCIDENTS Records relating to security incidents where charges are laid or damage/injury has occurred but sabotage was not involved.	Temporary	Retain 15 years after last action.	GA28 16.24.2

9.35.2	SECURITY – MINOR INCIDENTS Records relating to security incidents where no charges are laid or no damage/injury has occurred.	Temporary	Retain 7 years after last action.	GA28 16.24.3
9.35.3	SECURITY – OPERATIONAL ARRANGEMENTS Records relating to the surveillance and guarding of property. Includes patrol rosters, security reports and records of electronic security systems.	Temporary	Retain 7 years after last action.	PROS 07/01 14.15.1
9.35.4	SECURITY – SABOTAGE Records relating to security breaches where it is proven or strongly suspected that sabotage was involved. Includes armed hold ups, genuine bomb threats, arson, etc.	Permanent	Retain permanently.	GA28 16.24.1
9.36	STOCKTAKE Records documenting the stocktake of equipment and stores.	Temporary	Retain for 2 years after last action.	GA28 5.20.1
9.37	TENDERING The activities involved in receiving and assessing tenders for the supply, sale or purchase of goods and services.			
9.37.1	TENDERING – SPECIALTY CONTRACTS Records of specialty contracts. Includes contracts signed under seal.	Temporary	Retain 15 years after contract expires.	PROS 07/01 3.3.3
9.37.2	TENDERING – STANDARD CONTRACTS Records of simple or standard contracts. Excludes contracts signed under seal.	Temporary	Retain 7 years after contract expires.	GRDS 5.11.2
9.37.3	TENDERING – REGISTER Entries in the tender register.	Temporary	Retain for 7 years after last action.	GRDS 5.27.3
9.37.4	TENDERING – TENDERS Records relating to the development, issue and evaluation of tender documentation. Includes request for tender documents, statement of requirements, requests for expression of interests, draft contracts, evaluation reports, recommendations, final reports and public notices.	Temporary	Retain for 7 years after tender process is complete.	GRDS 5.27.1
9.38.	TRAFFIC INFRINGEMENTS Records relating to traffic infringements involving vehicles used or maintained by the University.	Temporary	Retain for 7 years after last action.	PROS 07/01 6.5.1
9.39	TRAFFIC MANAGEMENT Records related to traffic management on campus. Includes traffic offences (by vehicles on campus), parking offences, parking permits, public transport services and shuttle buses to/from the University etc.	Temporary	Retain for 5 years after last action.	GDA23 7.6.2

9.40	VALUATIONS Records of valuations on university properties.	Temporary	Retain until superseded.	QDAN601.2/C77
9.41	WASTE MANAGEMENT The activity of managing waste products. Includes toxic materials.			
9.41.1	WASTE MANAGEMENT - CHEMICALS Records relating to the removal, storage and disposal of hazardous substances where the level of danger to humans the environment is low and the effects are not potentially long-term. Includes laboratory chemicals and clinical waste. May include some pesticides.	Temporary	Retain 30 years after last action.	GRDS 12.7.10
9.41.2	WASTE MANAGEMENT – HAZARDOUS MATERIALS Records relating to the removal and disposal of hazardous materials, including asbestos and radioactive material. May include some pesticides.	Temporary	Retain 100 years after last action.	PROS 07/01 14.11.5
9.41.3	WASTE MANAGEMENT - ROUTINE Records relating to routine waste management.	Temporary	Retain 2 years after last action.	GRDS 12.7.12

Part 10: RESEARCH MANAGEMENT

The function of managing and supporting academic research projects.

REF	RESEARCH MANAGEMENT	CLASS	DISPOSAL ACTION	SOURCE
10.1	ACCREDITATION The processes associated with the University seeking accreditation for its research activities.			
10.1.1	ACCREDITATION – ANIMALS Records relating to accreditation of the University to conduct research with animals.	Temporary	Retain for 7 years after last action	GDA23 21.1.1
10.1.2	ACCREDITATION – BIOTECHNOLOGY Records relating to accreditation of the University to conduct biotechnology research under relevant legislation such as the Gene Technology Act 2000.	Permanent	Retain permanently	QDAN601.2/C97
10.2	ANATOMY The management and use of human bodies, body parts or specimens for research or teaching purposes			
10.2.1	ANATOMY - FACILITIES Records relating to inspections of anatomy facilities. Includes documentation, approval and general correspondence.	Temporary	Retain for 7 years after last action.	QDAN601.2/C90
10.2.2	ANATOMY - REGISTER Registers of bodies or specimens held by the University.	Permanent	Retain permanently	QDAN601.2/C91
10.2.3	ANATOMY - SPECIMENS Records relating to the acquisition of donation, care, storage, maintenance, management and disposal of anatomy or specimens. Includes consent forms, certificates of agreement, supporting documentation (eg. death certificates, revocation of authorisation, and acceptances.	Permanent	Retain permanently	QDAN601.2/C91
10.3	ANIMAL MANAGEMENT Records relating to the care, use, protection and disposal of animals and animal body parts or specimens for teaching or research purposes in accordance with statutory requirements	Temporary	Retain for 7 years after last action.	PROS 02/01 23.2.0
10.4	CENTRES & INSTITUTES Research and/or teaching units established by the University specifically to develop research, public policy, community engagement programs and other initiatives that benefit a wide cross section of society For reports or reviews, see RESEARCH MANAGEMENT – REPORTS, RESEARCH MANAGEMENT – REVIEWS etc			

10.4.1	CENTRES & INSTITUTES – ESTABLISHMENT Records relating to the establishment and strategic direction of centres and institutes established by the University.	Permanent	Retain permanently	QDAN601.2/C104
10.5	COMMERCIALISATION The activity of gaining economic benefit from a product or service derived from research activities			
10.5.1	COMMERCIALISATION – CONTRACTS (PRODUCT COMMERCIALISED) Records related to agreements for commercialisation where the product is commercialised. Includes licence deeds; agreements; confidentiality deeds; sub-licenses; assignments; deeds of indemnity	Permanent	Retain permanently	QDAN601.2/C105
10.5.2	COMMERCIALISATION – CONTRACTS (PRODUCT NOT COMMERCIALISED) Records related to agreements for commercialisation where the commercialisation is not successful. Includes licence deeds; agreements; confidentiality deeds; sub-licenses; assignments; deeds of indemnity	Temporary	Retain for 12 years after last action	QDAN601.2/C106
10.5.3	COMMERCIALISATION – FEASIBILITY STUDIES Planning and feasibility studies for the commercialisation of a product, including arrangements for commercial manufacture or design of a product	Temporary	Retain for 7 years after last action	QDAN601.2/C107
10.5.4	COMMERCIALISATION – REGISTRATION Records relating to the registration of patents, copyright and ownership of intellectual property where owned in part or completely by the University.	Permanent	Retain permanently	GDA23 22.1.5
10.6	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
10.6.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
10.6.2	COMMITTEES – EXTERNAL Records relating to external committees for which the University does not provide secretariat support.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
10.6.3	COMMITTEES – OPERATIONAL Records relating to the activities of university committees that report to the major committees. Includes school committees and sub-committees.	Temporary	Retain for 5 years after committee ceases to exist.	QDAN601.2/C326

10.7	CONSULTANCY SERVICES The provision of professional and testing services by the university or its staff to external bodies.			
10.7.1	CONSULTANCY SERVICES – ADMINISTRATION & MANAGEMENT Records relating to the administration and management of consultancy services. Includes working papers, progress reports, administrative arrangements, financial material, tender documentation.	Temporary	Retain for 7 years after expiry or cancellation of agreement	QDAN601.2/C108
10.7.2	CONSULTANCY SERVICES – ESTABLISHMENT Records relating to the establishment of consultancies. Includes preliminary correspondence concerning negotiations, agreements, costings, conditions of use and confidentiality, letter of offer, acceptance of offer and work plan and objectives.	Temporary	Retain for 7 years after expiry or cancellation of agreement	QDAN601.2/C109
10.7.3	CONSULTANCY SERVICES - EXPERT WITNESSES Records relating to the provision of expert witness services by academics or other staff. Includes the provision of advice, opinions and testimony to courts, tribunals or to other judicial offices.	Temporary	Retain for 15 years after last action	GDA23 22.2.3
10.8	DATA Records created in the conduct of a Research Project where the University is entitled to control or ownership of research data.			
10.8.1	DATA – CLINICAL TRIALS Research data created in the conduct of clinical trials.	Temporary	Retain for 20 years after last action or subjects have reached 25 years of age, whichever is longer	GDA23 23.6.2
10.8.2	DATA – ROUTINE Research data created in the conduct of research projects that does not involve clinical trials and does not fit within the definition of “significant”.	Temporary	Retain for 5 years after last action	GDA23 23.6.4
10.8.3	DATA – SIGNIFICANT Research data from projects of major national or international significance, interest or controversy or where the principal investigator has a widely acknowledged influence on the area of scholarship and where the data is crucial to the substantiation of the research findings and cannot be readily or practically duplicated. Includes drafts for publication in external publications and final research reports.	Permanent	Retain permanently	GDA23 23.6.1
10.9	ETHICAL CLEARANCE Records related to gaining ethical clearance in relation to research and research training activities.	Temporary	Retain for 20 years after last action.	GDA23 23.1.1 GDA23 23.1.2 GDA23 23.1.4

10.10	GRANT FUNDING The activities associated with the establishment, processing and administration of grants. Includes grant applications and grant register. For progress and final reports linked to grants, see RESEARCH MANAGEMENT - REPORTING	Temporary	Retain for 7 years after last action.	GDA23 4.2.2 GDA23 4.3.2
10.11	INTELLECTUAL PROPERTY The activities associated with managing the University's intellectual property, and the use of material held by the University in which another party owns the intellectual property.			
10.11.1	INTELLECTUAL PROPERTY – COPYRIGHT Records relating to arrangements concerning the use of intellectual property. Includes correspondence, agreements, formal arrangements, copyright declaration forms. Also includes royalty payments to authors for works where the University was publisher.	Temporary	Retain for 7 years after last action.	GRDS 9.7.3 GDA23 23.2.1
10.11.2	INTELLECTUAL PROPERTY – INFRINGEMENTS Records relating to infringements and disputes concerning intellectual property	Temporary	Retain for 10 years after last action.	QDAN601.2/C119
10.11.3	INTELLECTUAL PROPERTY – REGISTRATION Records relating to the registration of intellectual property. Includes application forms, objections, supporting documentation, sealed patent or licence	Permanent	Retain permanently.	QDAN601.2/C121
10.12	JOINT VENTURES Records relating to the management of joint operations between the university and other organisations where there is a contract, formal arrangement or joint contribution of resources. Includes the establishment and strategic direction of joint ventures.	Permanent	Retain permanently	QDAN601.2/C104
10.13	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
10.14	MISCONDUCT Records relating to allegations and investigations into breaches of the University's Code of Conduct for Research or any other instances of researcher misconduct. Records include allegations, investigations, disciplinary action and appeals	Temporary	Retain for 15 years after last action	PROS 07/01 12.10.1
10.15	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			

10.15.1	PLANNING - DEVELOPMENT Records relating to the development and formulation of research plans and strategies. Includes proposals for plans, correspondence, briefing papers, drafts and discussion papers.	Temporary	Retain for 3 years after last action	QDAN601.2/C148
10.15.2	PLANNING - OPERATIONAL The final approved version of any operational research plans.	Temporary	Retain for 5 years after plan is superseded.	QDAN601.2/C317
10.15.3	PLANNING - STRATEGIC Final approved research strategic plan. Includes objectives, goals, performance indicators, supporting documents and approval. Also includes mission statement.	Permanent	Retain permanently.	QDAN601.2/C146
10.16	POLICY The activities associated with developing and establishing University policies.			
10.16.1	POLICY - DEVELOPMENT Records relating to the development of policies related to research management.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
10.16.2	POLICY - FINAL Final approved version of policies related to research management.	Permanent	Retain permanently.	PROS 02/01 1.1.0
10.17	PRIZES & AWARDS The activity of establishing, administering and managing awards and prizes to staff in recognition of research excellence.			
10.17.1	PRIZES & AWARDS – ADMINISTRATIVE ARRANGEMENTS Records related to organisational arrangements for the award. Includes selection process and notification of outcome.	Temporary	Retain for 7 years last action.	PROS 02/01 7.2.0
10.17.2	PRIZES & AWARDS – ESTABLISHMENT Records related to establishing the award.	Temporary	Retain for 5 years after award is no longer offered	QDAN601.2/C263
10.17.3	PRIZES & AWARDS – RECIPIENTS Master list of all award winners.	Permanent	Retain permanently	QDAN601.2/C261
10.18	PROCEDURES Records relating to procedures for research activities.			
10.18.1	PROCEDURES - DEVELOPMENT Records relating to the development of procedures on research activities.	Temporary	Retain 10 years after superseded.	GDA23 3.6.4

10.18.2	PROCEDURES - FINAL Master set of procedures relating to research activities. Includes manuals, handbooks, directives.	Temporary	Retain 10 years after superseded.	GDA23 3.6.2
10.19	PROJECTS The activities associated with research projects. Includes the development, submission and approval of research proposals, and the management of approved research projects. Use RESEARCH MANAGEMENT - REPORTING for any formal reports on the project.			
10.19.1	PROJECTS – APPROVED Records relating to approved research projects. Includes records relating to project and funding proposals, applications forms or tenders, supporting information, referees, protocols, and agreements with research and grant partners.	Temporary	Retain for 7 years after last action	QDAN601.2/C142
10.19.2	PROJECTS – REGISTER Master register of funded research projects.	Permanent	Retain permanently	QDAN601.2/C140
10.19.3	PROJECTS – UNSUCCESSFUL Records relating to the formulation and/or development of research projects where the application is unsuccessful. Includes correspondence, working papers, preliminary data and agreements.	Temporary	Retain for 2 years after last action	QDAN601.2/C143
10.20	REPORTING Reports, including statistical reports, concerning research activities within the University.			
10.20.1	REPORTING – ANNUAL REPORTS Master copy of annual reports. Includes reports prepared by faculties and schools, and centres and institutes.	Permanent	Retain permanently	PROS 02/01 3.1.0
10.20.2	REPORTING – EXTERNAL Final version of routine administrative reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
10.20.3	REPORTING – INTERNAL Final version of administrative reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
10.20.4	REPORTING – OUTCOME Final reports on individual research grants and projects that include outcomes of the project.	Permanent	Retain permanently	GDA23 23.4.1

10.20.5	REPORTING – PROGRESS Interim and progress reports for research grants and projects.	Temporary	Retain for 7 years after last action.	GDA23 23.4.2
10.20.6	REPORTING – STRATEGIC Formal reports that significantly affect the direction and services of the University. Also includes reports documenting the University's performance in meeting institutional goals, objectives and performance indicators.	Permanent	Retain permanently	PROS 02/01 3.1.0
10.21	RESEARCH MATERIALS The management of materials used in research activities			
10.21.1	RESEARCH MATERIALS - DRUGS The acquisition, storage and disposal of chemicals, drugs, poisons used in research.	Temporary	Retain for 5 years after last action.	QDAN601.2/C129
10.21.2	RESEARCH MATERIALS – RADIOACTIVE SUBSTANCES The acquisition, storage and disposal of radioactive substances and radiation equipment. Includes x-ray equipment.	Temporary	Retain for 70 years after last action.	QDAN601.2/C133
10.22	REVIEWING Records relating to reviews of research management.	Temporary	Retain 5 years after last action.	GA28 19.18.1

Part 11: STUDENT MANAGEMENT

The function of managing the University's students. This classification includes admission, academic progress, graduation and grievances.

REF	STUDENT MANAGEMENT	CLASS	DISPOSAL ACTION	SOURCE
11.1	ADMISSIONS The activities associated with the admission of applicants into courses or programs. Includes undergraduate and postgraduate courses, short courses, bridging courses/programs, non-award courses. Also includes special entry schemes.			
11.1.1	ADMISSIONS – SPECIAL ENTRY SCHEMES Records related to the administration of special entry schemes. Includes conditions for eligibility and procedures for applications.	Permanent	Retain permanently	No mandatory requirement. Follows the precedent set by Monash University. see Monash retention schedule 12.2.2
11.1.2	ADMISSIONS - SUCCESSFUL Records relating to applications and offers that are successful and accepted	Temporary	Retain for 6 years after completion or discontinuation of course	GDA23 9.1.1
11.1.3	ADMISSIONS - UNSUCCESSFUL Records relating to applications which are unsuccessful.	Temporary	Retain for 1 year from end of appeal period	PROS 02/01 6.2.0
11.2	CARDS Records relating to the provision of student cards			
11.2.1	CARDS - CONCESSION CARD Records relating to the arrangement, management and issuing of concession cards. Includes any correspondence or consultation with organisations and businesses providing student concessions.	Temporary	Retain for 1 year after last action	GDA23 12.2.1
11.2.2	CARDS - IDENTIFICATION CARD Records relating to the provision of student identification eg. ID card	Temporary	Retain for 6 months after last action	GDA23 12.5.1
11.3	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			

11.3.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
11.3.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
11.3.3	COMMITTEES – OPERATIONAL Records relating to the activities of university committees that report to the major committees. Includes school committees and sub-committees.	Temporary	Retain for 5 years after committee ceases to exist.	QDAN601.2/C326
11.4	ENROLMENT Records relating to student enrolment in a course or program of study. Includes enrolment forms; variations in personal details such as change of name or address; variation in course program. Also includes advanced standing, recognition of prior learning, course transfers, deferment, exemptions, eligibility issues, discontinuation or withdrawal.	Temporary	Retain for 7 years after completion or discontinuation of course	PROS 02/01 8.1.0
11.5	EXCHANGE PROGRAM The activities involved in arranging opportunities for students to attend another institution while still being enrolled at the University.			
11.5.1	EXCHANGE PROGRAM - APPLICATIONS Records relating to applications received for placement as an exchange student. Includes application forms, notice of acceptance/ refusal, correspondence.	Temporary	Retain for 2 years after last action	GDA23 16.2.2
11.5.2	EXCHANGE PROGRAM – ARRANGEMENTS Records relating to arrangements, contracts or agreements with other institutions for student exchange programs	Temporary	Retain for 7 years after expiry of agreement or last action, whichever is longer	GDA23 16.2.3
11.6	FEES & CHARGES The processes involved in establishing, determining and administering the fees and charges to be levied on students.			
11.6.1	FEES & CHARGES – GOVERNMENT FEES Records relating to Commonwealth Government contribution fees such as HECS (Higher Education Contribution Scheme)	Temporary	Retain for 7 years after student has completed or discontinued course of study.	GDA23 12.4.1
11.6.2	FEES & CHARGES – SCHEDULE Schedules of fees set	Temporary	Retain for 10 years from year to which schedule relates.	QDAN601.2/C197
11.6.3	FEES & CHARGES – TUITION Records relating to the administration and collection of tuition fees (other than student contribution fees) and library fines. Includes correspondence relating to outstanding fees, fines and non-payment.	Temporary	Retain for 5 years after end of last financial year.	QDAN601.2/C193

11.7	GRADUATION The conferring of degrees or other qualifications on students who have met the criteria required to graduate. Also includes the awarding of honorary degrees.			
11.7.1	GRADUATION - ACADEMIC DRESS Records relating to academic dress protocol	Permanent	Retain permanently	QDAN601.2/C163
11.7.2	GRADUATION – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for the graduation ceremony. Includes arranging venue, speakers, catering, seating, special access.	Temporary	Retain for 1 year after last action	GDA23 13.2.4
11.7.3	GRADUATION - CONFERRAL PROCEEDINGS Records relating to the proceedings of conferral of certificates at a ceremony. Includes protocols and transcripts of guest speeches	Temporary	Retain for 10 years after graduation ceremony	QDAN601.2/C164
11.7.4	GRADUATION – ELIGIBILITY Notification to students of finalisation, approval and graduation ceremony.	Temporary	Retain for 2 years after graduation ceremony	QDAN601.2/C165
11.7.5	GRADUATION - HONORARY DEGREES Records relating to the nomination and recommendation for the award of an honorary degree.	Permanent	Retain permanently	QDAN601.2/C166
11.7.6	GRADUATION - PROGRAMS Program/order of proceedings eg. Certified copies of Graduation ceremony booklets – formal record of graduands.	Permanent	Retain permanently	GDA23 13.2.1
11.7.7	GRADUATION - REGISTER OF GRADUATES Master list of graduands.	Permanent	Retain permanently	PROS 02/01 12.1.0
11.7.8	GRADUATION – REPLACEMENT TESTAMUR Requests for replacement testamurs. Includes statutory declaration, payment of fee.	Temporary	Retain for 2 years after last action	QDAN601.2/C169
11.7.9	GRADUATION – UNCOLLECTED TESTAMUR Testamurs not collected at graduation ceremonies or returned to the university.	Temporary	Retain for 1 year after ceremony	GDA23 13.2.3
11.8	GRIEVANCES Records relating to formal grievances raised by a student. Includes complaints about perceived discrimination; work/study environment; peers, lecturers or tutors; access to equipment, facilities, tutorials or other services.	Temporary	Retain for 15 years after last action	GDA23 17.1.1

11.9	LOAD MANAGEMENT Records relating to the management of student intake load into programs and courses. Includes projection and target reports, and student load statistics reports.	Temporary	Retain for 5 years after last action	QDAN601.2/C199
11.10	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
11.11	MISCONDUCT Records relating to managing misconduct, including breaches of academic standards (eg. plagiarism, falsifying results and cheating), as well as allegations of non-academic misconduct (eg. harassment, vandalism, property damage or other forms of misconduct that do not involve academic studies). Includes reports, investigations, disciplinary action and appeals.	Temporary	Retain for 15 years after date of decision	PROS 02/01 9.1.0
11.12	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
11.12.1	PLANNING - DEVELOPMENT The development of plans to support student management.	Temporary	Retain for 3 years after last action.	GRDS 15.7.2
11.12.2	PLANNING - FINAL The final approved version of plans to support student management.	Temporary	Retain for 5 years after plan is superseded.	GA28 2.16.1
11.13	POLICY The activities associated with developing and establishing University policies.			
11.13.1	POLICY - DEVELOPMENT Records relating to the development of policies related to student management.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
11.13.2	POLICY - FINAL Final approved version of policies related to student management.	Permanent	Retain permanently.	PROS 02/01 1.1.0
11.14	PRIZES & AWARDS The activity of establishing, administering and managing awards and prizes to students of the University. Includes the University Medal, as well as individual school awards such as the School of Social Work's Karen Agnew Award.			
11.14.1	PRIZES & AWARDS – ADMINISTRATIVE ARRANGEMENTS Records related to organisational arrangements for the award. Includes selection process and notification of outcome.	Temporary	Retain for 7 years last action.	PROS 02/01 7.2.0

11.14.2	PRIZES & AWARDS – ESTABLISHMENT Records related to establishing the award.	Permanent	Retain permanently	PROS 02/01 7.1.0
11.14.3	PRIZES & AWARDS – MEDAL DESIGN Records relating to the design and manufacture of medals awards by the University for outstanding scholastic achievements.	Permanent	Retain permanently	QDAN601.2/C174
11.14.4	PRIZES & AWARDS – RECIPIENTS Master list of all award winners.	Permanent	Retain permanently	PROS 02/01 7.1.0
11.15	PROCEDURES Records relating to procedures for student management.			
11.15.1	PROCEDURES - DEVELOPMENT Records relating to the development and maintenance of procedures for student management.	Temporary	Retain 10 years after superseded.	GDA23 3.6.4
11.15.2	PROCEDURES - FINAL Master set of procedures relating to student management. Includes manuals, handbooks, directives.	Temporary	Retain 10 years after superseded.	GDA23 3.6.2
11.16	REPORTING Reports, including statistical reports, concerning student management.			
11.16.1	REPORTING – EXTERNAL Final version of routine formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
11.16.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
11.16.3	REPORTING – STRATEGIC Formal reports that significantly affect the direction and services of the University. Also includes reports documenting the University's performance in meeting institutional goals, objectives and performance indicators.	Permanent	Retain permanently	PROS 02/01 3.1.0
11.17	REVIEWING Records relating to the review of student management and administration.	Temporary	Retain 5 years after last action.	GA28 19.18.1
11.18	SCHOLARSHIPS The activities associated with the provision and award of scholarships, fellowships and bursaries.			
11.18.1	SCHOLARSHIPS – ADMINISTRATIVE ARRANGEMENTS Records relating to the administrative arrangements for the delivery of scholarships, fellowships and bursaries.	Temporary	Retain for 7 years last action.	PROS 02/01 7.2.0

11.18.2	SCHOLARSHIPS – ESTABLISHMENT The activities associated with the establishment, rules and conditions of scholarships, fellowships and bursaries.	Permanent	Retain permanently	PROS 02/01 7.1.0
11.18.3	SCHOLARSHIPS - REGISTER Register of recipients of scholarships, fellowships and bursaries.	Permanent	Retain permanently	PROS 02/01 7.1.0
11.19	SECURITY Records associated with security assessments of students. Includes criminal background checks and working with children checks.			
11.19.1	SECURITY – CRIMINAL RECORD CHECK (CERTIFICATES & FORMS) Certificates and forms received from other institutions, such as the police force, as part of a criminal background check.	Temporary	Retain until administrative use has concluded	GDA23 12.3.2
11.19.2	SECURITY – CRIMINAL RECORD CHECK (CONFIRMATION) A register, index or other record maintained by the University confirming each criminal background check it has conducted.	Temporary	Retain for 6 years after student has completed or discontinued course of study.	GDA23 12.3.3
11.19.3	SECURITY – WORKING WITH CHILDREN CHECK (CERTIFICATES & FORMS) Certificates and forms received from other institutions, such as the police force, as part of a working with children check. Includes prohibited person declaration, consent for working with children check	Temporary	Retain for 6 years after student has completed or discontinued course of study.	GDA23 12.3.4
11.19.4	SECURITY – WORKING WITH CHILDREN CHECK (CONFIRMATION) A register, index or other record maintained by the University confirming each working with children check it has conducted.	Temporary	Retain for 99 years after last action.	GDA23 12.3.5
11.20	STUDENT FILING The activity of recording interaction between the University and individual students.			
11.20.1	STUDENT FILING – CASE FILE Personal file of individual students created by faculties, schools or student administration.	Temporary	Retain for 7 years after last action	PROS 02/01 8.1.0
11.20.2	STUDENT FILING - REGISTER Records maintained by Student Administration that comprise a summary of student data on individual students. Includes student name, ID, date of birth, enrolment summary, misconduct summary, awards/courses completed.	Permanent	Retain permanently	QDAN601.2/C198

Part 12: STUDENT SERVICES

The function of providing support to the University's students.

REF	STUDENT SERVICES	CLASS	DISPOSAL ACTION	SOURCE
12.1	ACCOMMODATION The activities involved in providing residential accommodation for students.			
12.1.1	ACCOMMODATION – CASE FILE Records relating to student residents. Includes application and acceptances, breaches of code of conduct and any disciplinary action.	Temporary	Retain for 7 years after student leaves accommodation	PROS 02/01 16.2.0
12.1.2	ACCOMMODATION – CONDUCT Code of conduct for students.	Temporary	Retain until superseded	QDAN601.2/C202
12.1.3	ACCOMMODATION – FEES Schedule of fees.	Temporary	Retain for 5 years after superseded	QDAN601.2/C203
12.1.4	ACCOMMODATION – UNSUCCESSFUL APPLICATIONS Records relating to unsuccessful applicants for student accommodation.	Temporary	Retain for 6 months after semester commences	QDAN601.2/C201
12.2	CAREERS ADVICE The activities associated with providing information and assistance to students on employment, career guidance and job searches. Includes appointment registers, client records.	Temporary	Retain for 2 years after last action	QDAN601.2/C205
12.3	CHILDCARE The provision of childcare services or centres where the service is provided by the University or where, for other reasons (such as contractual agreements) the University controls the records.			
12.3.1	CHILDCARE - ACTIVITIES Records relating to daily and weekly routine. Includes program of activities	Temporary	Retain for 1 year after last action.	GDA23 10.4.3
12.3.2	CHILDCARE – APPLICATIONS Records relating to the provision of places for childcare. Includes waiting lists, special child care benefits statements and assessments, applications and records of interview, acceptance of places, learning and development plans.	Temporary	Retain for 3 years after child ceases to attend the service	QDAN601.2/C209
12.3.3	CHILDCARE - CASE FILE The personal record of each child. Includes Personal information including contact details, attendance, parental authorisations and permissions, injury, illness or medical treatment, complaints about the care of a child	Temporary	Retain until 25 years after last attendance	PROS 02/01 17.1.0

12.3.4	CHILDCARE - EQUIPMENT Records relating to equipment in use at the centre	Temporary	Retain for 3 years after disposal of equipment	QDAN601.2/C212
12.3.5	CHILDCARE - FATALITIES Records relating to childcare deaths	Temporary	Retain for 6 years after death	QDAN601.2/C211
12.3.6	CHILDCARE - LICENCES Records relating to the establishment and licensing of childcare centres.	Temporary	Retain for 7 years after centre ceases to operate	GDA23 10.2.1
12.3.7	CHILDCARE – PROGRAM Records relating to the development and evaluation of the centre’s program.	Temporary	Retain for 3 years after last action	QDAN601.2/C214
12.4	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee’s establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
12.4.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
12.4.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
12.4.3	COMMITTEES – OPERATIONAL Records relating to the activities of university committees that report to the major committees. Includes school committees and sub-committees.	Temporary	Retain for 5 years after committee ceases to exist.	QDAN601.2/C326
12.5	CONTRACTING-OUT The activities involved in arranging, procuring and managing the provision of services by an external contractor or consultant.			
12.5.1	CONTRACTING-OUT – CONSULTANTS & CONTRACTORS The activities associated with managing the use of consultants and contractors by the University.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.1.1 PROS 07/01 3.2.1
12.5.2	CONTRACTING-OUT – CONTRACTS Records of contracts including documents associated with the negotiation process. Excludes tender records.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.3.4
12.5.3	CONTRACTING-OUT – REGISTER A register for all contracts managed by the university.	Permanent	Retain permanently.	PROS 07/01 3.3.1
12.6	COUNSELLING The activities associated with the provision of formal advice, support and guidance to students. It refers to all formal advisory services, not just psychological counselling. use STUDENT SERVICES – CAREERS ADVICE for career counselling/advice.			

12.6.1	COUNSELLING – ADMINISTRATIVE ARRANGEMENTS Records relating to the provision of advice and counselling services.	Temporary	Retain for 2 years after last action	QDAN601.2/C349
12.6.2	COUNSELLING - APPOINTMENT REGISTER Appointment registers for student support services.	Temporary	Retain for 2 years after last action	QDAN601.2/C219
12.6.3	COUNSELLING – CASE FILE Records relating to advice, guidance and support to individual students. Includes personal, financial, health or other matters.	Temporary	Destroy 7 years after last appointment	QDAN601.2/C220
12.7	FINANCIAL ASSISTANCE Records relating to the provision of financial assistance to students. Includes student loans, discretionary funds for students to attend conferences, sporting competitions.			
12.7.1	FINANCIAL ASSISTANCE – FUND ADMINISTRATION Records relating to the establishment, administration and management of funds and schemes. Includes rules and conditions.	Temporary	Retain for 5 years after scheme becomes obsolete	QDAN601.2/C225
12.7.2	FINANCIAL ASSISTANCE – SUCCESSFUL APPLICATIONS Records relating to applications to receive assistance in which the application is successful. Includes records of interviews and other assessment methods.	Temporary	Retain for 7 years after last action or discharge of loan	PROS 02/01 19.2.0
12.7.3	FINANCIAL ASSISTANCE – UNSUCCESSFUL APPLICATIONS Records relating to applications to receive assistance in which the application is not successful. Includes records of interviews and other assessment methods.	Temporary	Retain for 1 year after last action and expiry of appeal period	GDA23 19.2.2
12.8	HEALTH SERVICES The provision of health services where the service is provided directly by the university or where, for other reasons (such as contractual agreements) the University controls the records. Includes medical services, dental services, speech pathology, physiotherapy.			
12.8.1	HEALTH SERVICES - APPOINTMENT REGISTER Appointment registers for student health services.	Temporary	Retain for 2 years after last action	QDAN601.2/C233
12.8.2	HEALTH SERVICES – CASE FILE Records providing evidence of clinical care to a patient.	Temporary	Retain for 10 years after last patient service or medico-legal action	QDAN601.2/C235
12.8.3	HEALTH SERVICES – DRUGS Records relating to the provision of the prescriptions for drugs and the use/storage	Temporary	Retain for 7 years after last action	GDA23 14.1.1
12.8.4	HEALTH SERVICES – LICENCES Records relating to the accreditation of the medical practice. Includes licenses, permits.	Temporary	Retain for 5 years after license or permit lapses	QDAN601.2/C231

12.8.5	HEALTH SERVICES - NOTIFIABLE DISEASES Records displaying evidence of clinical care to an individual patient with a notifiable disease. eg. Hepatitis B, HIV, Leprosy, Severe Acute Respiratory Syndrome (SARS), Tuberculosis.	Temporary	Retain until patient turns 85 years of age and 10 years since last patient service or medico-legal action	QDAN601.2/C234
12.8.6	HEALTH SERVICES – PROVIDER AGREEMENTS Agreements with service providers.	Temporary	Retain for 7 years after expiry of agreement	QDAN601.2/C232
12.9	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
12.10	ORIENTATION Records related to the planning and management of student orientation. Includes O week activities and program, venue bookings	Temporary	Retain for 2 years after last action	QDAN601.2/C241
12.11	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.			
12.11.1	PLANNING - DEVELOPMENT The development of plans to support student services.	Temporary	Retain for 3 years after last action.	GRDS 15.7.2
12.11.2	PLANNING - FINAL The final approved version of plans to support student services.	Temporary	Retain for 5 years after plan is superseded.	GA28 2.16.1
12.12	POLICY The activities associated with developing and establishing University policies.			
12.12.1	POLICY - DEVELOPMENT Records relating to the development of policies related to student services.	Temporary	Retain 10 years after last action.	GRDS 15.8.2
12.12.2	POLICY - FINAL Final approved version of policies related to student services.	Permanent	Retain permanently.	PROS 02/01 1.1.0
12.13	PROCEDURES Procedures relating to student services.			
12.13.1	PROCEDURES - DEVELOPMENT Records relating to the development of procedures pertaining to student services.	Temporary	Retain 5 years after superseded.	GDA23 3.6.8
12.13.2	PROCEDURES - FINAL Final approved versions of manuals, handbooks and directives detailing procedures for student services.	Temporary	Retain 10 years after superseded.	GDA23 3.6.6
12.14	RELIGIOUS SUPPORT The activities associated with pastoral care and religious support to the university students and staff. Includes appointment of chaplain, programs for support.	Temporary	Retain for 5 years after last action or end of appointment	GDA23 19.5.1

12.15	REPORTING Reports, including statistical reports, concerning the student services function within the University.			
12.15.1	REPORTING – EXTERNAL Final version of formal reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
12.15.2	REPORTING – INTERNAL Final version of formal reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
12.16	REVIEWING Records relating to the review of programs and services for students.	Temporary	Retain 5 years after last action.	GA28 19.18.1
12.17	SPECIAL NEEDS The provision of services to students with special needs. Includes disabled access, interpreters, reading assistance for sight impaired students, etc. Also includes assistance to remote or distance education students			
12.17.1	SPECIAL NEEDS – FUNDING Records relating to applications, agreements and contracts for grants and funding from the Commonwealth Government	Temporary	Retain for 7 years after funding ceases	QDAN601.2/C222
12.17.2	SPECIAL NEEDS - SUPPORT Records relating to the provision of special needs support services. Includes equipment, programs, assistance.	Temporary	Retain for 6 years after last action	GDA23 19.6.1
12.18	STUDENT ASSOCIATIONS Records relating to interaction between the University and student bodies such as student unions or student sporting clubs	Temporary	Retain for 6 years after last action	GDA23 19.3.1
12.19	STUDY ASSISTANCE Records relating to the provision of academic skills services to support students. Includes administration of specific programs, client records	Temporary	Retain for 2 years after last action	GDA23 19.9.1
12.20	TENDERING The activities involved in receiving and assessing tenders for the supply, sale or purchase of goods and services.			
12.20.1	TENDERING – SPECIALTY CONTRACTS Records of specialty contracts. Includes contracts signed under seal.	Temporary	Retain 15 years after contract expires.	PROS 07/01 3.3.3
12.20.2	TENDERING - STANDARD CONTRACTS Records of simple or standard contracts. Excludes contracts signed under seal.	Temporary	Retain 7 years after contract expires.	GRDS 5.11.2
12.20.3	TENDERING - REGISTER Entries in the tender register.	Temporary	Retain for 7 years after last action.	GRDS 5.27.3

12.20.4	TENDERING – TENDERS Records relating to the development, issue and evaluation of tender documentation. Includes request for tender documents, statement of requirements, requests for expression of interests, draft contracts, evaluation reports, recommendations, final reports and public notices.	Temporary	Retain for 7 years after tender process is complete.	GRDS 5.27.1
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Part 13: TEACHING & LEARNING

The function of formulating and delivering the teaching curriculum and facilitating the learning process. This classification includes course delivery, curriculum development, planning and assessment.

REF	TEACHING & LEARNING	CLASS	DISPOSAL ACTION	SOURCE
13.1	ASSESSMENT The activities associated with processing and forming judgments about the quality and extent of student learning.			
13.1.1	ASSESSMENT – ACADEMIC RECORD Official academic records of the grades achieved by a student in a course or program.	Permanent	Retain permanently	QDAN601.2/C245
13.1.2	ASSESSMENT - APPEALS Records relating to appeals about examination/assessment results.	Temporary	Retain for 7 years after last action	PROS 02/01 9.2.0
13.1.3	ASSESSMENT – ASSIGNMENTS Essays, assignments and other forms of assessment completed by students but not collected by them or returned to them.	Temporary	Retain for 6 months after last action.	PROS 02/01 11.2.2
13.1.4	ASSESSMENT – ATTENDANCE Records relating to attendance for teaching and assessment purposes. Includes examinations, classes, tutorials and practicums in which the student did NOT work with children. For practicums in which the student worked with children, see PRACTICUM - ATTENDANCE	Temporary	Retain for 2 years after last entry	PROS 02/01 11.1.2
13.1.5	ASSESSMENT - CHANGES Records relating to changes to assessment results. Includes requests and outcomes	Temporary	Retain for 6 years after completion of course	GDA23 25.9.4
13.1.6	ASSESSMENT - EXAMINATION ARRANGEMENTS Records relating to administrative arrangements for examination and assessment. Includes supervision/invigilation arrangements and timetables	Temporary	Retain for 1 year after last action	QDAN 601.2/C255
13.1.7	ASSESSMENT – EXAMINATION PAPERS Master set of exam question papers.	Permanent	Retain permanently	QDAN601.2/C248
13.1.8	ASSESSMENT - GRADING Records relating to the grading or marking of individual assessment items such as assignments and essays. Excludes the final grade for a subject or course.	Temporary	Retain for 2 years after last action	QDAN601.2/C251

13.1.9	ASSESSMENT - HIGHER DEGREE EXAMINER REPORTS Examiners and/or assessors reports and related records	Temporary	Retain until end of appeal period	GDA23 25.11.3
13.1.10	ASSESSMENT - HIGHER DEGREE SUPERVISION Records relating to the supervision of higher degree students. Includes appointment of supervisor, and advice and liaison between supervisor and student.	Temporary	Retain for 6 years after last action	GDA23 25.11.1
13.1.11	ASSESSMENT - REVIEW Records relating to review, moderation and confirmation of results.	Temporary	Retain for 2 years after last action	QDAN601.2/C252
13.1.12	ASSESSMENT - SPECIAL CONSIDERATION Requests from students that special consideration be given due to circumstances which affected their performance in an examination or other assessment activity. Includes requests for deferred or supplementary examinations	Temporary	Retain for 3 years after last action	GDA23 25.10.1
13.1.13	ASSESSMENT - THESES Master set of theses and dissertations submitted by higher degree (PhD and Masters) and honours students.	Permanent	Retain permanently	QDAN601.2/C258
13.2	CENTRES & INSTITUTES Research and/or teaching units established by the University specifically to develop research, public policy, community engagement programs and other initiatives that benefit a wide cross section of society. For reports or reviews, see TEACHING & LEARNING – REPORTS, TEACHING & LEARNING – REVIEWS etc			
13.2.1	CENTRES & INSTITUTES – ESTABLISHMENT Records relating to the establishment and strategic direction of centres and institutes established by the University.	Permanent	Retain permanently	QDAN601.2/C104
13.3	CLINICS The provision of a service to the general community by the University's students in the course of their studies under the supervision of teaching staff and/or practicing professionals. Includes allied health clinics, as well as clinics conducted in professional areas such as psychology, social work and human movement studies.			
13.3.1	CLINICS – APPOINTMENT REGISTER Appointment registers for university teaching clinics.	Temporary	Retain for 2 years after last action	QDAN601.2/C269
13.3.2	CLINICS –CASE FILE Records providing evidence of clinical care to a patient	Temporary	Retain for 10 years after last patient service or medico-legal action	QDAN601.2/C265

13.3.3	CLINICS – NOTIFIABLE DISEASES Records displaying evidence of clinical care to an individual patient with a notifiable disease. eg. Hepatitis B, HIV, Leprosy, Severe Acute Respiratory Syndrome (SARS), Tuberculosis	Temporary	Retain until patient turns 85 years of age and 10 years since last patient service or medico-legal action	QDAN601.2/C264
13.3.4	CLINICS – SCHEDULE OF FEES Schedules of fees set	Temporary	Retain for 5 years after superseded	QDAN601.2/C270
13.4	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
13.4.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
13.4.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4
13.4.3	COMMITTEES – OPERATIONAL Records relating to the activities of university committees that report to the major committees. Includes school committees and sub-committees.	Temporary	Retain for 5 years after committee ceases to exist.	QDAN601.2/C326
13.5	COURSE DELIVERY The activities involved in the delivery of courses and their component units.			
13.5.1	COURSE DELIVERY – CALENDARS & HANDBOOKS Master set of calendars, faculty handbooks and course guides.	Permanent	Retain permanently	GDA23 25.4.3
13.5.2	COURSE DELIVERY – COURSE OUTLINES Master copy of course and subject outlines.	Temporary	Retain for 10 years after course/program was last offered.	QDAN601.2/C285
13.5.3	COURSE DELIVERY – MEDIA RECORDINGS Audio and audiovisual recordings of lectures, tutorials, seminars, workshops, clinics etc.	Temporary	Retain for 6 months after last action.	QDAN601.2/C286
13.5.4	COURSE DELIVERY – SUBJECT RESOURCES Resources and materials used in course and subject delivery. Includes study guides, readings, self-assessment exercises, audiovisual teachings aids and lecture notes. For materials subject to legislative or other regulatory controls, see TEACHING & LEARNING – LEARNING MATERIALS.	Temporary	Retain for 2 years after last action.	QDAN601.2/C287

13.5.5	COURSE DELIVERY – TEACHING TIMETABLES Records relating to the organisation, control and scheduling of classes. Includes timetables, rosters, organising venues, teaching allocations.	Temporary	Retain for 1 year after last action.	QDAN601.2/C321
13.6	CURRICULUM MANAGEMENT The activities associated with the development, approval and review of curriculum. Includes accreditation.			
13.6.1	CURRICULUM MANAGEMENT – APPROVAL Records relating to the approval and/or accreditation of curricula. Includes master set of approved curricula. Also includes external accreditation by professional or registration bodies.	Permanent	Retain permanently	PROS 02/01 21.2.0
13.6.2	CURRICULUM MANAGEMENT – DEVELOPMENT Records relating to the development of curricula for university courses. This includes the initiation or discussion of proposals, as well as working papers, committee records, input from advisory groups.	Temporary	Retain for 10 years after program is no longer offered	QDAN601.2/C282
13.6.3	CURRICULUM MANAGEMENT - REVIEW Records relating to internal or external reviews of curricula. Includes working papers, course alteration proposals, draft revised subject outlines, unapproved curriculum revisions.	Temporary	Retain for 3 years after last action	GDA23 25.7.1
13.7	ETHICAL CLEARANCE Records related to gaining ethical clearance in relation to research and research training activities.	Temporary	Retain for 20 years after last action.	GDA23 23.1.1 GDA23 23.1.2 GDA23 23.1.4
13.8	EVALUATION Activities relating to the collection of information and assessment of teaching processes. Includes Australian Graduate Survey, student surveys, evaluation of teaching, course experience questionnaire.			
13.8.1	EVALUATION – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative activities associated with the collection of data for an evaluation of teaching	Temporary	Retain for 2 years after last action	QDAN601.2/C295
13.8.2	EVALUATION – FEEDBACK Copies of completed questionnaires and survey data.	Temporary	Retain for 5 years after last action	QDAN601.2/C296
13.8.3	EVALUATION – OUTCOME Reports of evaluation outcome.	Permanent	Retain permanently	QDAN601.2/C297
13.9	GRANT FUNDING The activities associated with the establishment, processing and administration of grants. Includes grant applications and grant register. For progress and final reports linked to grants, see TEACHING & LEARNING - REPORTING	Temporary	Retain for 7 years after last action.	GDA23 4.2.2 GDA23 4.3.2

13.10	<p>LEARNING MATERIALS The management of materials used in teaching activities which are subject to legislative or other regulatory controls.</p> <p>For routine materials see TEACHING & LEARNING – COURSE DELIVERY</p>			
13.10.1	<p>LEARNING MATERIALS - DRUGS Records relating to the acquisition, storage and disposal of chemicals, drugs, poisons used in teaching and learning activities.</p>	Temporary	Retain for 5 years after last action.	QDAN601.2/C302
13.10.2	<p>LEARNING MATERIALS – RADIOACTIVE SUBSTANCES Records relating to the acquisition, storage and disposal of radioactive substances and radiation equipment. Includes x-ray equipment.</p>	Temporary	Retain for 70 years after last action.	QDAN601.2/C308
13.11	<p>MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.</p>	Temporary	Retain until administrative use ceases.	GA28 19.13.1
13.12	<p>PLANNING The activities associated with developing plans and strategies to achieve goals and objectives.</p>			
13.12.1	<p>PLANNING - DEVELOPMENT Records relating to the development and formulation of operational and strategic teaching plans.</p>	Temporary	Retain for 3 years after last action.	QDAN601.2/C319
13.12.2	<p>PLANNING - OPERATIONAL The final approved version of operational teaching plans. Includes improvement programs and areas of teaching focus.</p>	Temporary	Retain for 5 years after plan is superseded.	QDAN601.2/C317
13.12.3	<p>PLANNING - STRATEGIC Approved teaching strategic plan. Includes objectives, goals, performance indicators, supporting documents and approval. Also includes mission statement.</p>	Permanent	Retain permanently.	QDAN601.2/C320
13.13	<p>POLICY The activities associated with developing and establishing University policies.</p>			
13.13.1	<p>POLICY - DEVELOPMENT Records relating to the development of policies related to teaching and learning activities.</p>	Temporary	Retain 10 years after last action.	GRDS 15.8.2
13.13.2	<p>POLICY - FINAL Final approved version of policies related to teaching and learning activities.</p>	Permanent	Retain permanently.	PROS 02/01 1.1.0
13.14	<p>PRACTICUM The activities associated with managing student work placements. Includes clinical placements and experiential learning.</p>			
13.14.1	<p>PRACTICUM - ADMINISTRATIVE ARRANGEMENTS Records relating to arrangements and liaison with placement providers.</p>	Temporary	Retain for 7 years after last action	PROS 02/01 15.3.1

13.14.2	PRACTICUM – ATTENDANCE Records relating to attendance where students are working with children. For practicums not involving children, see ASSESSMENT - ATTENDANCE	Temporary	Retain for 10 years after last action	GDA23 25.3.2
13.14.3	PRACTICUM – PARTICIPATION Summary records for courses of study where the number of hours completed and proof of satisfactory performance may be required for accreditation purposes (e.g. nursing or teaching practicums). For certification/accreditation purposes the information required will usually include the number of hours/days completed and the result/grade. These can usually be gained through a combination of the student's transcript and the relevant handbook. This disposal class should be used for practicum reports where these details are not available. Otherwise treat practicum reports as ASSESSMENT - GRADING.	Temporary	Retain for 50 years after completion of course	GDA23 25.2.3
13.14.4	PRACTICUM – PLACEMENT AGREEMENTS Agreement with other organisations to allow placements.	Temporary	Retain for 13 years after agreement expires	QDAN 601.2/C311
13.15	PRIZES & AWARDS The activity of establishing, administering and managing awards and prizes to staff in recognition of teaching excellence.			
13.15.1	PRIZES & AWARDS – ADMINISTRATIVE ARRANGEMENTS Records related to organisational arrangements for the award. Includes selection process and notification of outcome.	Temporary	Retain for 7 years last action.	PROS 02/01 7.2.0
13.15.2	PRIZES & AWARDS – ESTABLISHMENT Records related to establishing the award.	Temporary	Retain for 5 years after award is no longer offered	QDAN601.2/C263
13.15.3	PRIZES & AWARDS – RECIPIENTS Master list of all award winners.	Permanent	Retain permanently	QDAN601.2/C261
13.16	PROCEDURES Records relating to procedures for teaching activities.			
13.16.1	PROCEDURES - DEVELOPMENT Records relating to the development and maintenance of procedures for teaching activities.	Temporary	Retain 10 years after superseded.	GDA23 3.6.4
13.16.2	PROCEDURES - FINAL Master set of procedures relating to teaching activities. Includes manuals, handbooks, directives.	Temporary	Retain 10 years after superseded.	GDA23 3.6.2
13.17	PROJECTS The activities associated with teaching projects for the purpose of improving student learning. Includes the development, submission and approval of projects, and management of the projects. Use TEACHING & LEARNING - REPORTING for any formal reports on the project.			

13.17.1	PROJECTS – APPROVED Records relating to the formulation and/or development of teaching projects. Includes records relating to project and funding proposals, applications forms or tenders, supporting information, referees, protocols.	Temporary	Retain for 5 years after last action	QDAN601.2/C314
13.17.2	PROJECTS – CONTRACTS Agreements or contracts relating to teaching projects.	Temporary	Retain for 7 years after expiry of agreement.	QDAN601.2/C313
13.18	REPORTING Reports, including statistical reports, related to teaching and learning.			
13.18.1	REPORTING – ANNUAL REPORTS Master copy of annual reports. Includes reports prepared by faculties and schools, and centres and institutes.	Permanent	Retain permanently	PROS 02/01 3.1.0
13.18.2	REPORTING – EXTERNAL Final version of routine administrative reports submitted to external organisations.	Temporary	Retain for 10 years after last action.	GDA23 3.9.7
13.18.3	REPORTING – INTERNAL Final version of administrative reports prepared for internal use only.	Temporary	Retain for 5 years after last action.	GDA23 3.9.5
13.18.4	REPORTING – OUTCOME Final reports on individual research grants and projects that include outcomes of the project.	Permanent	Retain permanently	GDA23 23.4.1
13.18.5	REPORTING – PROGRESS Interim and progress reports for research grants and projects.	Temporary	Retain for 7 years after last action.	GDA23 23.4.2
13.18.6	REPORTING – STRATEGIC Formal reports that significantly affect the direction and services of the University. Also includes reports documenting the University's performance in meeting institutional goals, objectives and performance indicators.	Permanent	Retain permanently	PROS 02/01 3.1.0
13.19	REVIEWING Records relating to reviews of teaching activities.	Temporary	Retain 5 years after last action.	GA28 19.18.1

Part 14: TECHNOLOGY & TELECOMMUNICATIONS

The function of managing the University's technology systems and resources.

REF	TECHNOLOGY & TELECOMMUNICATIONS	CLASS	DISPOSAL ACTION	SOURCE
14.1	ACQUISITION Records related to the purchase of IT products and technology.	Temporary	Retain 7 years after last action.	PROS 07/01 19.1.1
14.2	AGREEMENTS Records relating to the establishment, negotiation, maintenance and review of agreements for technology and telecommunications services. Includes software licences.	Temporary	Retain 7 years after expiry of agreements.	GA28 20.2.1
14.3	APPLICATION DEVELOPMENT The activities associated with developing systems and managing them over time. Includes specifications, testing, pilots, prototyping and metadata requirements.			
14.3.1	APPLICATION DEVELOPMENT – CONFIGURATION Records relating to the configuration or customisation of off the shelf packages to meet the needs of the university.	Temporary	Retain 7 years after system is superseded.	GA28 20.4.4
14.3.2	APPLICATION DEVELOPMENT – DESIGN Records relating to the design and development of systems. Includes research, project proposals, project management, systems documentation.	Temporary	Retain 7 years after system is superseded.	GA28 20.4.1
14.3.3	APPLICATION DEVELOPMENT – TESTING Records associated with testing activities. Includes testing strategies, result forms and test reports.	Temporary	Retain 7 years after last action.	PROS 07/01 19.3.3
14.4	AUDIT Records relating to the auditing of IT activities and systems.	Temporary	Retain 7 years after last action.	PROS 07/01 19.4.1
14.5	COMMITTEES The activities associated with the managing of committees and boards. Includes the committee's establishment, appointment of members, terms of reference, minutes, reports, agenda etc.			
14.5.1	COMMITTEES – ADMINISTRATIVE ARRANGEMENTS Records relating to administrative arrangements for internal and external committee meetings. Includes catering, venue bookings.	Temporary	Retain for 2 years after last action.	GRDS 15.2.5
14.5.2	COMMITTEES – EXTERNAL Records relating to external committees.	Temporary	Retain for 5 years after last action.	GA28 1.0.4

14.5.3	COMMITTEES – OPERATIONAL Records relating to the activities of internal committees that consider operational matters and issues. Includes sub-committees and working parties.	Temporary	Retain for 5 years after committee ceases to exist.	GRDS 15.2.2
14.6	COMPLIANCE Records relating to compliance with regulatory and quality standards or requirements.	Temporary	Retain 6 years after last action.	GA28 20.7.1
14.7	CONTRACTING-OUT The activities involved in arranging, procuring and managing the provision of services by an external contractor or consultant.			
14.7.1	CONTRACTING-OUT – CONSULTANTS & CONTRACTORS The activities associated with managing the use of consultants and contractors by the university.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.1.1 PROS 07/01 3.2.1
14.7.3	CONTRACTING-OUT – CONTRACTS Records of contracts including documents associated with the negotiation process. Excludes tender records.	Temporary	Retain 7 years after contract expires.	PROS 07/01 3.3.4
14.7.4	CONTRACTING-OUT – REGISTER A register for all contracts managed by the university.	Permanent	Retain permanently.	PROS 07/01 3.3.1
14.8	CONTROL Records relating to creating, maintaining and evaluating control mechanisms. Includes records documenting history of access and data changes, such as system access logs, internet access logs, system change logs and audit trails.	Temporary	Retain 7 years after last action.	PROS 07/01 19.5.6
14.9	CUSTOMER SERVICE Records relating to the planning, monitoring and evaluating services provided to customers. Includes helpdesk.	Temporary	Retain 2 years after last action.	PROS 07/01 19.6.1
14.10	DATA ADMINISTRATION The activities associated with maintaining and using the data that is held in a system, either automated or manual. Includes data recovery.	Temporary	Retain 7 years after system is superseded.	GA28 20.9.1
14.11	DATA MIGRATION Records relating to the migration of data between electronic systems or from one electronic medium to another.	Temporary	Retain for 1 generation after migration.	GRDS 16.2.4
14.12	DATABASE MANAGEMENT The activities associated with the building, prototyping and testing of databases. Includes management of user rules, passwords and monitoring usage and response times.	Temporary	Retain 7 years after last action.	PROS 07/01 19.8.1

14.13	DISPOSAL Records relating to the disposal of technology and telecommunications. Includes sale, transfer, auction, exchange, return or destruction.	Temporary	Retain 7 years after disposal.	GA28 20.10.1
14.14	EVALUATION Records documenting the analysis of business processes.	Temporary	Retain 7 years after last action.	PROS 07/01 19.10.1
14.15	INSTALLATION Records relating to the installation of databases, applications or systems. Includes the implementation, installation, configuration and relocation of equipment and facilities.	Temporary	Retain 5 years after last action.	GRDS 16.4.1
14.16	LEASES Records related to leasing items and equipment.	Temporary	Retain 7 years after lease expires.	PROS 07/01 19.13.1
14.17	MAINTENANCE The activities associated with the upkeep, repair, servicing and preservation of equipment and systems.	Temporary	Retain 5 years after last action.	GA28 20.16.1
14.18	MEETINGS Records relating to section, unit or team meetings. Includes agenda, minutes, catering, venue bookings. Excludes committees.	Temporary	Retain until administrative use ceases.	GA28 19.13.1
14.19	PLANNING The activities associated with developing plans and strategies to achieve goals and objectives			
14.19.1	PLANNING - DEVELOPMENT The development of plans for IT projects, systems and activities within the university.	Temporary	Retain for 3 years after last action.	GRDS 16.7.1
14.19.2	PLANNING – FINAL Final approved versions of plans for IT projects, systems and activities within the university.	Temporary	Retain for 5 years after plan is superseded.	GRDS 16.7.2
14.20	POLICY The activities associated with developing and establishing University policies.			
14.20.1	POLICY - DEVELOPMENT Records relating to the development of the university's IT policies.	Temporary	Retain for 3 years after last action.	GA28 20.18.2
14.20.2	POLICY - FINAL Final approved version of the university's IT policies.	Temporary	Retain 10 years after policies are superseded	GRDS 15.8.5
14.21	PROCEDURES Procedures relating to IT.			

14.21.1	PROCEDURES - DEVELOPMENT Records relating to the development and review of IT procedures.	Temporary	Retain for 3 years after last action.	GA28 20.19.2
14.21.2	PROCEDURES - FINAL Final approved versions of manuals, handbooks and directives detailing IT procedures.	Temporary	Retain for 5 years after procedures are superseded.	GA28 20.19.1
14.22	REPORTING Reports, including statistical reports, concerning the University's IT functions and systems.	Temporary	Retain for 7 years after last action.	GA28 20.20.1
14.23	REVIEWING Records relating to the review of technology and telecommunications programs and services. Includes post implementation reviews	Temporary	Retain 5 years after last action.	GA28 20.22.1
14.24	SECURITY Records relating to security of IT systems. Includes security breaches such as unauthorised access to a computer network, alteration of data.	Temporary	Retain 7 years after last action.	GRDS 16.9.2
14.25	TENDERING The activities involved in receiving and assessing tenders for the supply, sale or purchase of goods and services.			
14.25.1	TENDERING – SPECIALTY CONTRACTS Records of specialty contracts. Includes contracts signed under seal.	Temporary	Retain 15 years after contract expires.	PROS 07/01 3.3.3
14.25.2	TENDERING - STANDARD CONTRACTS) Records of simple or standard contracts. Excludes contracts signed under seal.	Temporary	Retain 7 years after contract expires.	GRDS 5.11.2
14.25.3	TENDERING - REGISTER Entries in the tender register.	Temporary	Retain for 7 years after last action.	GRDS 5.27.3
14.25.4	TENDERING – TENDERS Records relating to the development, issue and evaluation of tender documentation. Includes request for tender documents, statement of requirements, requests for expression of interests, draft contracts, evaluation reports, recommendations, final reports and public notices.	Temporary	Retain for 7 years after tender process is complete.	GRDS 5.27.1

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