RECORDS SERVICES

UNIVERSITY OF MELBOURNE

RECORDS DISPOSAL SCHEDULE NO. 20

STUDENT SUPPORT SERVICES
&
ACADEMIC ADMINISTRATION RECORDS

_____	_____	_____
Custodian	**University Archivist**	**University Secretary**

Issued in 2003

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INTRODUCTION

This Student Support Services & Academic Administration Records Disposal Schedule was first issued in 2003.

1. ACCOUNTABILITY AND EVIDENCE

Established under Statute, The University of Melbourne is a public institution and accountable to Parliament for its actions.

Documenting business activity by making transactional records, and capturing them into recordkeeping systems, provides a basis of organisational accountability. A record comprises recorded information in any form, including data in computer systems, created, received and maintained by the University in the **transaction of business activities** or the conduct of affairs and retained as **evidence** of such activity. Inadequate records and recordkeeping can contribute to failures to meet accountability and other organisational requirements.

Recordkeeping encompasses :

- the creation of records in the course of business activity; and
- the design, implementation and operation of records systems; and
- the management of records as current records and as archives.

2. WHAT IS A RECORDS DISPOSAL SCHEDULE?

A records disposal schedule is a document issued by the University listing various classes of records and specifying periods of retention, from short term through to permanent retention. It is not a list of file titles. It is designed to cater for the needs of all parties with an interest in the records, as a source of information for administrative practice, decision making or historical research. Legal, administrative, financial and accountability requirements and purposes are taken into consideration when determining the retention periods for records.

Disposal may be either immediate destruction, temporary retention in Records Services' intermediate records storage or transfer to University Archives in the case of hardcopy paper records; and deletion, transfer to CD or ongoing migration in the case of electronic records.

Records retention periods must be strictly adhered to in order to ensure compliance with legislative requirements, ie records must not be kept for longer than is stated in the 'Disposal Action' column of the schedule.

The aim of the Student Support Services & Academic Administration Records Disposal Schedule is to provide continuing instruction to all staff on which:

- records have been identified as having continuing value;
- records are considered to be of temporary value and therefore can be destroyed as soon as there is no longer any administrative use;
- records to transfer to Records Services when they are no longer required by staff.

This ensures:

- consistent, lawful and timely disposal of records;
- that papers retained in the office environment are kept to a necessary efficient minimum by discarding periodically those deemed temporary;
- records are retained for administrative, legal, financial and archival requirements.

The Student Support Services & Academic Administration Records Disposal Schedule has been developed from information gathered from, and in consultation with:

Academic Services Division

Internal Audit

Legal Services

University Archivist

University Secretary

3. SCOPE

The Student Support Services & Academic Administration Records Disposal Schedule is intended to cover operational administrative records specific to the Academic Services Division. It also includes the contents of ***Records Disposal Schedule No. 15 Common Administrative Records*** and elements of the ***EHS (Environmental Health & Safety) Recordkeeping Requirements*** so that it provides a comprehensive coverage of records disposal and staff do not need to refer to two separate documents. The recordkeeping requirements cover electronic records as well as paper records.

The Schedule has been developed to deal with current and future records created within Academic Services Division, as well as those records which are no longer created.

The Student Support Services & Academic Administration Records Disposal Schedule enables these departments to dispose of records covered in the records disposal schedule without reference to Records Services. However, a listing of the

records destroyed or transferred to Intermediate Storage should be maintained by the individual work units.

4. ELECTRONIC RECORDS

While the management of paper-based records relating to an activity is often handled satisfactorily, the related electronic records are often neglected because the records are "invisible". Legislation requiring the retention of records does not distinguish between paper and electronic records.

In relation to electronic records, the appraisal of systems to identify records of continuing value should be undertaken during the system design, upgrade or review. Recordkeeping requirements and preferred methods of 'archiving' should be identified, documented and incorporated into systems management.

Further information is available from Records Services on extensions 46996, 46405 or 44225 and in the Records Management Policy & Procedures Manual at http://www.unimelb.edu.au/records/manual/

5. WEB SITES / WEBPAGES

It is anticipated that all University departments/areas will have a web presence of some description. The University is currently developing a Web Archiving policy, however in the meantime the Records Management Program advises the following in regards to the long term maintenance of web records:

- If the contents of the page contain long term recordkeeping value ***(check for the type of record under the relevant disposal class)*** and do not exist in any other format (e.g. paper, word document, etc) then it may be advisable to print the document/record and store with other paper records.

- Logs (either in paper format or in an excel spreadsheet or word document) should be maintained which document when changes have been made to various pages within the site. Ideally, all major changes should be authorised and signed off by a Manager to ensure the authenticity of the material being presented on the website.

- When the site is undergoing a major upgrade, (ie a brand new site is built to replace the current one) – the Records Management Program should be notified. Alternatively, a copy of the entire site can be put on CD.

6. PROGRAMMING OF PLANNED DISPOSAL

To ensure effective control of non-current records and to facilitate effective use of storage space, disposal action should be programmed as an annual activity. It should

be conducted at a time when staff resources are available to undertake either destruction or transfer of records to Records Services intermediate records storage.

7. HOW TO USE THE STUDENT SERVICES RECORDS DISPOSAL SCHEDULE

The entries on the Student Support Services & Academic Administration Records Disposal Schedule are arranged by function. Within each function records are described and the disposal action that can be taken is specified, that is how long records are to be retained by the department before being destroyed or transferred to Records Services' intermediate records storage or University Archives.

7.1 Terminology Used in the Student Services Records Disposal Schedule

Entry No.
The entry number provides citation and ease of reference.

Class / Activity
This entry describes records which are created in the conduct of the function.

Disposal Action
Within this entry there are references to '*after* a*ction completed'* and '*last action'* which refer to the completion of the task, action or administrative process. '*When administrative use has ceased'* means when there is no longer any need to refer to the document.

As mentioned earlier, records retention periods must be strictly adhered to in order to ensure compliance with legislative requirements, ie records must not be kept for longer than is stated in the 'Disposal Action' column of the schedule.

Custody
This entry indicates the department(s) responsible for storing the records.

Prime Source
This entry specifies the department responsible for maintaining the prime record of the function and activity. That department will retain the prime record in accordance with legislative, financial, administrative and archival recordkeeping requirements. If there is an entry in this column the user of this records disposal schedule can be assured that their work unit holds a duplicate record or copy and that the prime record is held elsewhere.

This does not mean that the prime record will be retained by that department permanently. The recordkeeping requirement for prime records will have been identified and specified in a records disposal schedule e.g. the Human Resources Records Disposal Schedule, Financial Records Disposal Schedule, Property and Buildings Records Disposal Schedule or the Risk Management Office Records Disposal Schedule.

7.2 To Identify The Retention Period:

1. Check the table of contents for the function or the index for the activity or subject;

2. Turn to the appropriate disposal class and identify the appropriate activity or record;

3. Identify the disposal action;

4. Carry out the disposal action.

It is important not to try to make a file or record fit a disposal class if there is not an appropriate class listed in the disposal schedule. A list should be made of these types of records as the Student Support Services & Academic Administration Records Disposal Schedule may need updating or alteration. If you are unable to find an appropriate disposal class for specific records you should seek assistance from Records Services.

8. DESTRUCTION AS 'NORMAL ADMINISTRATIVE PRACTICE'

Certain types of records and information can be destroyed as a 'normal administrative practice' without reference to a disposal authority issued by Records Services. Destruction as 'normal administrative practice' usually occurs because the information is:

- duplicated elsewhere (e.g. a handwritten draft or information copy, spare copies of minutes & agendas);
- unimportant (eg. telephone message slips);
- of short term facilitative value (eg. compliments slips, reference materials, address lists);
- publications, superseded manuals, catalogues, trade journals held for informational purposes;
- unsolicited advertising material.

9. DESTRUCTION AUTHORISATION, NOTIFICATION & METHODS

There are three types of records authorised for destruction which require different methods of disposal:

- sensitive
- confidential
- normal routine

9.1 Hardcopy Records

Sensitive records contain information about individuals (e.g. staff, students, donors), tender bids, financial reports, information given in confidence or records related to investigations.

Sensitive records in paper format should be shredded. The security provided by the shredding of records depends on how fine the paper is shredded. For highly sensitive records, cross shredding may be necessary.

Confidential records are those which do not contain sensitive information but also need to be disposed of in a secure manner due to their confidential nature.

Confidential wheelie bins can be obtained from Cleaning Services. Alternatively, if you are destroying a large volume of sensitive records a contractor can be used to destroy records on your behalf. Contractors providing secure destruction services can collect records from your department for destruction, or you can deliver records to them.

For sensitive and confidential records the use of lockable wheelie bins is appropriate. These bins are collected by the contractor and the contents destroyed in a secure manner. Records Services can provide details of contractors providing secure document destruction services.

Normal routine records which are neither confidential or sensitive can be destroyed using the usual methods of recycling or waste disposal methods.

Note - Pins, staples, clips and folders should be extracted from all records prior to destruction.

9.2 Electronic records

When destroying sensitive, confidential and routine records in electronic format, you must ensure that they are completely deleted from the electronic system and that this includes all back-up tapes, disks, CDs etc.

Simply pressing the delete key is not sufficient to ensure the deletion of an electronic record. You need to ensure that the hard drive of a computer or a disk is completely reformatted or overwritten. Records stored on magnetic media can be erased by subjecting them to a strong magnetic field. Records stored on optical media or even on the hard drive of a computer, can be cut, crushed or otherwise physically destroyed – this may be necessary for example, in the case of records of a particularly sensitive nature.

9.3 List the records you are destroying

It is essential to keep a list of the individual files that have been destroyed according to the Records Disposal Schedule, and the date on which they were destroyed. It is also just as important to document the destruction of electronic records from electronic systems, hard drives or other media.

This list should then be signed by the Head of Department. This is an accountable record that needs to be maintained for accountability and evidential requirements.

10. TRANSFER OF RECORDS TO STORAGE

Records identified for permanent or temporary retention in Records Services' intermediate records storage should be listed (including retention period), boxed and transferred to Records Services in accordance with the **Guidelines for Transfer of Records to Intermediate Storage** (available at http://www.unimelb.edu.au/records/rmp/transfer.html)

Records Services should be contacted prior to the transfer of records to obtain a records transfer number and archives boxes (if required). The Records Transfer List should be forwarded to Records Services prior to the transfer of records.

Electronic records and databases that have been identified as a permanent record must be appropriately maintained within the department/work unit and strategies adopted to ensure the accessibility, integrity and authenticity of the records over time.

11. AMENDMENT AND UPDATING

The Student Support Services & Academic Administration Records Disposal Schedule is a reflection of current practice and procedures and will need to be updated on a regular basis as the types of records being created by the University will alter over time.

The Student Support Services & Academic Administration Records Disposal Schedule will be regularly reviewed to ensure that it complies with current recordkeeping practices. Retention periods may need to be altered due to legislative change and additions to the Schedule may need to be made due to new activities or changes which effect the types of records created and their retention periods.

Suggested inclusions, amendments and reviews of retention periods should be referred to the Manager Records Services or Records Analysts.

When planning to undertake records disposal, Records Services' website should be checked to ensure that your copy of a records disposal schedule is the most current version (http://www.unimelb.edu.au/records/rmp/schedules.html).

12. CONTACTS

Manager, Records Services	Donna Mc Rostie	x 46996
Records Analysts	Peter Bode	x 44225
	Lisa Poulier	x 46405
Webpage	http://www.unimelb.edu.au/records/	

Entry	Class/Activity	Disposal Action	Custody	Prime Source
1.0	**ACCOUNTS (see FINANCE)**			
2.0	**ADMISSIONS (see also MARKETING & RECRUITMENT (ONSHORE))**			
	This keyword relates to records of the University selection process for all undergraduate courses, incoming study abroad and exchange, as well as postgraduate courses for international students. It also covers prospective international student enquiries and records relating to a program for gifted senior secondary students – the Melbourne University Program for High Achieving Students (MUPHAS); and a special entry scheme for undergraduate programs – the Targeted Access Program (TAP). (Information taken from Academic Services' website.)			
2.1	**International Admissions**			
2.1.1	Application file: • Accepted (*student name, contact details, background information, banking details, referee reports, copies of correspondence, visa documentation)*	Send Student file to relevant faculty or School of Graduate Studies when admissions process is complete	Faculties or School of Graduate Studies	International Admissions
2.1.2	Application file: • Conditional Offers • Unconditional Offers – not accepted (*student name, contact details, background information, banking details, referee reports, correspondence)*	Destroy 2 years after date of offer or after conditions have been met	Retain in work unit until destroyed	International Admissions

Entry	Class/Activity	Disposal Action	Custody	Prime Source
2.0	**ADMISSIONS continued**			
2.1	**International Admissions continued**			
2.1.3	Application file: • Incomplete • Rejected (*student name, contact details, background information, banking details, referee reports, correspondence)*	Destroy 2 years after date of application	Retain in work unit until destroyed	International Admissions
2.1.4	Student files: • PhDs or Masters of Research • Undergraduate ***see 2.1.1 Application file: Accepted***			
2.1.5	Unsuccessful Letters: ***see 2.1.3 Application file: Incomplete or Rejected***			
2.2	**National Admissions** **Note that there are no hardcopy applicant files as this process is done through VTAC & the Faculty Offices*			
2.2.1	Course Database (*all undergraduate courses, entry requirements, fees)*	Delete data when superseded	Retain in work unit in a secure and accessible form until deleted	National Admissions

Entry	Class/Activity	Disposal Action	Custody	Prime Source
2.0	**ADMISSIONS continued**			
2.2	**National Admissions continued**			
2.2.2	Entry Requirements Spreadsheet	Retain permanently	Retain in work unit in a secure and accessible form	National Admissions
2.2.3	MUPHAS (Melbourne University Program for High Achieving Students) Student Files • Appeals	Destroy 2 years after determination	Retain in work unit until destroyed	MUPHAS
2.2.4	MUPHAS (Melbourne University Program for High Achieving Students) Student Files • Successful	Destroy 3 years after completion of course	Retain in work unit until destroyed	MUPHAS
2.2.5	MUPHAS (Melbourne University Program for High Achieving Students) Student Files • Unsuccessful	Destroy 2 years after determination	Retain in work unit until destroyed	MUPHAS
2.2.6	Qualifications Assessment Files (*course information, exchanges of correspondence between institution & University of Melbourne, copy of assessment letter sent back, discipline assessments of courses, sample exams/syllabus)*	Destroy when superseded	Retain in work unit until destroyed	National Admissions
2.2.7	Qualifications Database (*summary of hardcopy Qualifications Assessment Files)*	Delete data when superseded	Retain in work unit in a secure and accessible form until deleted	National Admissions

Entry	Class/Activity	Disposal Action	Custody	Prime Source
2.0	**ADMISSIONS continued**			
2.2	**National Admissions continued**			
2.2.8	Schedule of Course Fees • Hardcopy booklet	Retain permanently	Transfer 2 copies of booklet to Records Management Program each time a new version is created. Destroy extraneous copies once administrative use ceases.	National Admissions
2.2.9	Schedule of Course Fees • Electronic copy	Delete 3 years after date of schedule	Retain in work unit in a secure and accessible form until deleted	National Admissions
2.2.10	TAP (Targeted Access Program) Applicant Database (*student name, contact details, details of student's disadvantage, statements made by applicants, statements made by referees)*	Delete data 1 year after determination	Retain in work unit in a secure and accessible form until deleted	National Admissions
2.2.11	TAP (Targeted Access Program) Applicant Files	Destroy 2 years after determination	Retain in work unit until destroyed	National Admissions

Entry	Class/Activity	Disposal Action	Custody	Prime Source
2.0	**ADMISSIONS continued**			
2.2	**National Admissions continued**			
2.2.12	VTAC selection material ***Refer to Records Disposal Schedule No. 8 – Faculty Administrative records***			
3.0	**ARCHIVES see RECORDS MANAGEMENT & ARCHIVES**			
4.0	**BUILDINGS**			
	This section does not cover records created and maintained by Property and Buildings.			
4.1	Records concerning arrangements for cleaning, waste removal, pest control, indoor plants	Destroy 7 years after action completed	Retain in work unit until destroyed	Work Unit
4.2	Records concerning arrangements for movement of staff and equipment to new accommodation	Destroy 2 years after action completed	Retain in work unit until destroyed	Work Unit
4.3	Records relating to minor works	Destroy 2 years after file closed	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
5.0	**CAREERS & EMPLOYMENT**			
	This Keyword covers activities relating to the process of maximising the career and further study outcomes of current students and recent graduates of the University of Melbourne. Services provided include a Careers Resource Centre, Seminars, Resume Reviews, Careers Counselling, email bulletins, co-ordinated recruitment via the Graduate Employment Program and Vacation Work Program; organised work experience including the Industry Consultants; Student Workplace Projects program and current employment vacancies on-line via the UniMelb JobSearch job database. Services are also provided to employers seeking to recruit University of Melbourne students and graduates, and support to faculties and departments of the University of Melbourne. (Information taken from Academic Services' website.)			
5.1	Careers and Employment Programs • Hardcopy	Retain permanently	Transfer to Records Management Program when administrative use ceases	Careers & Employment
5.2	Careers and Employment Programs • Electronic	Retain permanently	Retain in work unit in a secure and accessible form	Careers & Employment
5.3	Careers Online Database: • Administration Module	Delete data 2 years after input	Retain in work unit in a secure and accessible form until deleted	Careers & Employment
5.4	Careers Online Database: • Administrative Reports (hardcopy printouts)	Retain permanently	Transfer to Records Management Program when administrative use ceases	Careers & Employment

Entry	Class/Activity	Disposal Action	Custody	Prime Source
5.0	**CAREERS & EMPLOYMENT continued**			
5.5	Careers Online Database: • Appointments	Delete data 1 year after input	Retain in work unit in a secure and accessible form until deleted	Careers & Employment
5.6	Careers Online Database: • Employer Module	Delete when reference ceases	Retain in work unit in a secure and accessible form until deleted	Careers & Employment
5.7	Careers Online Database: • Events Calendar	Delete data 1 year after input	Retain in work unit in a secure and accessible form until deleted	Careers & Employment
5.8	Careers Online Database: • Student Module • Student Work Placements	Delete data 2 years after last contact or 2 years after placement completed	Retain in work unit in a secure and accessible form until deleted	Careers & Employment
5.9	Employer Contact Details	Destroy when superseded	Retain in work unit until destroyed	Careers & Employment
5.10	Graduate Destination Surveys	Retain permanently	Transfer to Records Management Program when reference ceases	Careers & Employment

Entry	Class/Activity	Disposal Action	Custody	Prime Source
6.0	**CHAPLAINCY**			
	This keyword covers the activities of the Chaplains, who offer counselling, support and assistance with any personal difficulties or discussion regarding matters of religion and spirituality. ***(Information taken from Academic Services' website.)***			
6.1	Activities Database (s*tudent details associated with one-off activities / events)*	Delete data once activity described has been completed	Retain in work unit in a secure and accessible form until deleted	Chaplaincy Services
6.2	Contacts Database (*student name, contact details)*	Delete data when students have completed studies	Retain in work unit in a secure and accessible form until deleted	Chaplaincy Services
6.3	Critical Incident Records (electronic) *(services held for events such as memorials)*	Delete 7 years after date of creation	Retain in work unit in a secure and accessible form until deleted	Chaplaincy Services
6.4	Debriefing Group Records (hardcopy) (*no personal details recorded)*	Retain permanently	Transfer to Records Management Program when reference ceases	Chaplaincy Services
6.5	Sign-up Sheets *(for particular activities or groups which are utilized on occasions such as O Week)*	Destroy once data is entered into Contacts Database	Retain in work unit until destroyed	Activities Database

Entry	Class/Activity	Disposal Action	Custody	Prime Source
7.0	**COLLECTION & ASSET MANAGEMENT**			
	This Keyword covers the acquisition, control, monitoring and management of equipment, plant, vehicles etc.			
	This section does not cover records created and maintained by Financial Operations			
7.1	Attractive Items Register	Destroy when superseded	Retain in work unit until destroyed	Financial Operations
7.2	Brochures, product and trade catalogues	Destroy when administrative use has ceased	Retain in work unit until destroyed	External Vendors
7.3	Equipment guarantees and warranties	Destroy when administrative use has ceased	Retain in work unit until destroyed	Work Unit
7.4	Equipment Write Off Form (department copy)	Destroy 1 year after write off	Retain in work unit until destroyed	Financial Operations
7.5	Maintenance contracts and service agreements	Destroy 7 years after superseded or equipment disposed of	Retain in work unit until destroyed	Work Unit
7.6	Records relating to the purchase, hire, lease, maintenance and sale of equipment	Destroy 7 years after date of documentation	Retain in office until destroyed	Work Unit
7.7	Register of Equipment on Loan	Destroy when superseded	Retain in office until destroyed	Work Unit
7.8	Unsolicited correspondence offering goods or services	Destroy when administrative use has ceased	Retain in office until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
8.0	**COMMITTEES & WORKING GROUPS**			
	This Keyword covers the agendas, correspondence and papers relating to committees, boards, working parties or groups.			
8.1	Information or reference copies of minutes, agendas and supporting papers received from central administration and faculties, such as: • Divisional Committees (copies) • External Committees (copies) • University Committees (copies)	Destroy when administrative use has ceased	Retain in work unit until destroyed	Academic Services Division, other University offices & External Organizations
8.2	Minutes, agendas and supporting documentation from the ***work unit EHS*** (Environmental Health and Safety) Committee.	Destroy 4 years after date of minutes	Retain in work unit until destroyed	Work Unit
8.3	Minutes, agendas and supporting documentation from Work Unit Committees where the work unit is prime source. • where the Committee has been established to determine policy and for strategic planning purposes eg Transition Committee	Retain permanently	Transfer to Records Management Program when reference ceases	Work Unit
8.4	Minutes, agendas and supporting documentation from Work Unit Committees where the work unit is prime source. • where the Committee has been established for general operational purposes eg weekly office meetings	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
8.0	**COMMITTEES & WORKING GROUPS continued**			
8.5	Transition Committees Database (*internal committees membership contact details for the following committees: Academic Transition Working Group, Student Support Transition Group, Student Advisory Panel, Schools Forum)*	Delete data when superseded	Retain in work unit in a secure and accessible form until deleted	Transition Program
9.0	**COMPLAINTS see GRIEVANCES**			
10.0	**COMPLIANCE see LEGAL**			
11.0	**CONFERENCES & SEMINARS**			
	This section does not cover records created and maintained by Timetabling and Venue & Conference Management.			
11.1	Brochures and promotional material *(externally produced)*	Destroy when administrative use has ceased	Retain in work unit until destroyed	External Organizations
11.2	Papers presented by Senior University staff at conferences and seminars	Retain Permanently	Transfer to Records Management Program when reference ceases	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
11.0	**CONFERENCES & SEMINARS continued**			
11.3	Papers received at conferences and seminars	Destroy when administrative use has ceased	Retain in work unit until destroyed	External Organizations
11.4	Records relating to arrangements for attendance at conferences, seminars, conventions	Destroy 2 years after action has ceased	Retain in work unit until destroyed	Work Unit
12.0	**COPYRIGHT see LEGAL**			
13.0	**COUNSELLING see also HEALTH**			
	This Keyword covers the activities related to the counselling function within the University. This includes psychological counselling provided to staff and students, and a variety of community development and consultancy programs addressing emerging trends likely to impact upon the emotional or psychological well-being of students and staff, or which serve to enrich and enhance the student experience. It also includes programs and services external to the University environment which strengthen and consolidate funding and allow for service growth, while at the same time enhancing staff skill and expertise. (Information taken from Academic Services' website.)			
13.1	**Client Data Management System**			
13.1.1	Client Data Management System: • Client Records (c*lient notes and summaries of interviews with clients*)	Transfer current year's data to CD at the conclusion of each year Destroy 7 years after date of CD creation	Retain in work unit in a secure and accessible form until destroyed	Counselling

Entry	Class/Activity	Disposal Action	Custody	Prime Source
13.0	**COUNSELLING continued**			
13.1	**Client Data Management System continued**			
13.1.2	Client Data Management System: • CDC (Community Development & Consultancy) Records (*records of seminars, training sessions, consultancies and income generation activities undertaken by counsellors)*	Retain permanently	Transfer to CD every 5 years, then copy original CD every 5 years thereafter to ensure accessibility	Counselling
13.2	Appointment Schedules: *(listing of appointment times with counsellors, including staff/students with failures to attend appointments)*	Destroy 7 years after Appointment Schedule closed	Retain in work unit until destroyed	Counselling
13.3	Client Registration Cards: (*hardcopy demographic and faculty/year details of registered clients)*	Destroy 7 years after date of last appointment	Retain in work unit until destroyed	Counselling
13.4	Faculty Reports: *(hardcopy statistical reports extracted from the Client Data Management System which indicate client usage levels of Counselling for each Faculty)* • Non-identifying aggregated data	Retain permanently	Transfer to Records Management Program 5 years after date of report	Counselling

Entry	Class/Activity	Disposal Action	Custody	Prime Source
13.0	**COUNSELLING continued**			
13.5	Presentations: (*records of presentations given by Organization held on Debussy system)*	Retain permanently	Transfer to CD every 5 years, then copy original CD every 5 years thereafter to ensure usability	Counselling
14.0	**DISABILITY LIAISON**			
	This Keyword covers activities providing assistance to people with a disability to enable them to participate fully in the University environment. This includes the provision of advice and services on a range of issues, including admission procedures, appropriate accommodation and support requirements, liaison with staff, the Organization of service providers, such as note-takers, sign language interpreters and personal readers etc. It also covers policy development and the education of staff in relation to the University's obligations under current disability legislation. ***(Information taken from Academic Services' website.)***			
14.1	Academic Support Workers Database (*name, level of training, qualifications)*	Delete when superseded	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit
14.2	Alternative Format Database (*materials being converted to another format for individual students)*	Delete data 5 years after input	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
14.0	**DISABILITY LIAISON continued**			
14.3	Booking Database (*tracks support provided to student)*	Delete data 7 years after input	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit
14.4	Contacts Database *(contact information for individuals who provide services to Disability Liaison)*	Delete when superseded	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit
14.5	Disposal Database – non-current students *(student name, contact details, accommodation, any previous funding, assessment, case notes, course, emergency contact details, disability category, nature of disability, Impact on study, services agreement; last date of contact with the student.)* *Contains the only record of what files have been destroyed*	Retain Permanently	Retain in work unit in a secure and accessible form	Disability Liaison Unit
14.6	Equipment Database (*details of equipment which have been lent to students)*	Delete data 7 years after input	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
14.0	**DISABILITY LIAISON continued**			
14.7	Holding Database – non-current students *(student name, contact details, accommodation, any previous funding, assessment, case notes, course, emergency contact details, disability category, nature of disability, Impact on study, services agreement;)* *Duplicates the Student file*	Delete data 5 years after input	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit
14.8	Payment Request Printouts *(from Bookings Database*)	Destroy 7 years after date of printout	Retain in work unit until destroyed	Disability Liaison Unit
14.9	Pays Database *(Classification and pay rate information, used to assist in calculating payments to staff)*	Migrate data at the end of each year Delete database 5 years after migration	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit
14.10	Student Database – current students *(student name, contact details, accommodation, any previous funding, assessment, case notes, course, emergency contact details, disability category, nature of disability, Impact on study, services agreement)*	Migrate data into Holding Database 2 years after last point of contact with student	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit
14.11	Student Files *(includes e-mail correspondence with student)*	Destroy 10 years after last point of contact with student	Retain in work unit until destroyed or deleted	Disability Liaison Unit
14.12	Subjects Database *(Subject number and subject name, obtained from Student Administration)*	Migrate data at end of each year Delete database 5 years after migration	Retain in work unit in a secure and accessible form until deleted	Disability Liaison Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
15.0	**ENQUIRIES**			
15.1	Enquiries received which result in the provision of a routine reply or printed material	Destroy 6 months after action completed	Retain in work unit until destroyed	Work Unit
16.0	**ENVIRONMENTAL HEALTH & SAFETY (EHS)** ***(as per EHS Recordkeeping Requirements document)***			
	This Keyword covers operational records created, received and maintained within University departments which relate to Environmental Health and Safety issues, such as dangerous goods, first aid, hazards, hazardous substances, incident reporting, waste disposal etc. The 'EHS Recordkeeping Requirements' document is designed to cater for the needs of all departments within the University to satisfy the requirements of SafetyMAP and Environmental Health & Safety Audits.			
	This section does not cover records created and maintained by the Risk Management Office			
16.1	**Committee Minutes see COMMITTEES & WORKING GROUPS**			
16.2	**Contracts**			
16.2.1	Consultancies, consultants' reports	Destroy 7 years after date of report	Retain in work unit until destroyed	Risk Management Office
16.2.2	Contracts which include EHS requirements for delivery of goods and services	Destroy 7 years after contract expires	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.2	**Contracts continued**			
16.2.3	Tender / Contract documents (*contracts or agreements including health and safety arrangements*)	Destroy 7 years after expiry of contract or agreement	Retain in work unit until destroyed	Risk Management Office
16.3	**Dangerous goods**			
16.3.1	Dangerous goods despatch documents with relevant emergency procedures	Destroy when administrative use ceases	Retain in work unit until destroyed	Risk Management Office
16.3.2	Dangerous goods manifest	Destroy when superseded	Retain in work unit until destroyed	Risk Management Office
16.4	**Electronic information**			
16.4.1	Computer network which hosts relevant EHS information for all employees • Departmental network	Delete when superseded	Retain in work unit in a secure and accessible form until superseded	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.4	**Electronic information**			
16.4.2	Records documenting the development, maintenance, alterations and improvement to databases/systems	Retain permanently	Transfer to Records Management Program 3 years after administrative use ceases	Work Unit
16.4.3	Software/licence agreements re EHS systems	Destroy 7 years after expiry of agreement	Retain in work unit until destroyed	Work Unit
16.5	**First aid**			
16.5.1	Current documented assessment of first aid requirements	Destroy when superseded	Retain in work unit until superseded	Work Unit
16.5.2	Inspection checklist of first aid kits	Destroy 2 years after date of checklist	Retain in work unit until destroyed	Work Unit
16.5.3	Records of first aid treatments	Destroy 7 years after date of treatment	Retain in work unit until destroyed	Work Unit
16.5.4	Records of first aider training	Destroy work unit copy 3 years after date of training	Retain in work unit until destroyed	Staff Development & Training

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.6	**Hazardous substances**			
16.6.1	Copies of current MSDS's (Material Safety Data Sheets)	Replace 5 years after date issued if product still on site	Retain in work unit until destroyed	External Vendor
16.6.2	Documented responsibility allocated for checking MSDS's (Material Safety Data Sheets) applicability, currency, legibility and availability.	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.6.3	Hazardous substances register	Destroy when superseded	Retain in work unit until destroyed	Risk Management Office
16.6.4	Procedures for hazardous substances – that ensure all substances are appropriately identified and labelled in production process	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.6.5	Procedures for hazardous substances – that ensure labelling is compliant with legislative requirements	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.6.6	Procedures for hazardous substances – which incorporate checks of all incoming substances to ensure correct supply and clear, durable labelling.	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.6.7	Records of disposal of hazardous substances in accordance with legislative requirements	Destroy 7 years after date of records	Retain in work unit until destroyed	Risk Management Office

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.7	**Hazards**			
16.7.1	Hazard identification records and risk assessment control records: • Hazard reports • Risk assessments	Destroy 7 years after hazard or risk has been eliminated or neutralized	Retain in work unit until destroyed	Work Unit
16.7.2	Records that demonstrate that employees are informed of the procedure eg noticeboard, induction.	Destroy 3 years after date of record	Retain in work unit until destroyed	Work Unit
16.8	**Health, Safety & Environmental issues**			
16.8.1	Accidents, Personal Injury and Safety Procedures • Work Unit	Retain Permanently	Transfer to Records Management Program 5 years after administrative use ceases	Work Unit
16.8.2	Analysis data from sample collections resulting from internal environmental audit	Retain Permanently	Send to Risk Management Office	Risk Management Office
16.8.3	Work Unit schedule for monitoring, screening and testing of employees	Destroy when superseded	Retain in work unit until destroyed	Occupational Health Nurse

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.8	**Health, Safety & Environmental issues continued**			
16.8.4	Emergency Procedures • Work Unit	Retain Permanently	Transfer to Records Management Program 5 years after administrative use ceases	Work Unit
16.8.5	Environment & Safety Audit Correction Reports • Internally conducted by work unit	Destroy work unit copy 2 years after date of report	Retain in work unit until destroyed	Work Unit
16.8.6	Lists of employer and employee representatives (on display)	Destroy when superseded	Retain in work unit until destroyed	Risk Management Office
16.8.7	Procedures for information distribution	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.8.8	Records which demonstrate that employees are informed of the need for monitoring and results	Destroy when superseded	Retain in work unit until destroyed	Risk Management Office
16.8.9	Workplace Inspection Reports • External audits	Retain Permanently	Transfer to Records Management Program 7 years after date of audit	Risk Management Office

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.8	**Health, Safety & Environmental issues continued**			
16.8.10	Workplace Inspection Reports • Internal audits	Destroy 2 years after date of report	Retain in work unit until destroyed	Work Unit
16.9	**High Risk Activities**			
16.9.1	Inspection checklist and results of restricted access area controls	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.9.2	Procedures for high risk activities –controlling access in restricted access areas	Destroy 7 years after procedures are superseded	Retain in work unit until destroyed	Maintenance
16.9.3	Procedures for high risk activities – determining specialist equipment licence needs	Destroy 7 years after procedures are superseded	Retain in work unit until destroyed	Property & Buildings
16.9.4	Restricted access map or restricted authorised personnel list	Destroy when superseded	Retain in work unit until destroyed	Maintenance
16.9.5	Signs or systems to delineate restricted access areas	Destroy when superseded	Retain in work unit until destroyed	Maintenance
16.9.6	Work permits for specialized equipment	Destroy 1 month after expiry of permit	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.10	**Incident Reporting**			
16.10.1	Accident investigations and first aid records	Destroy 7 years after notification is completed	Retain in work unit until destroyed	Risk Management Office
16.10.2	Records related to the notification of incidents [S3 form]	Destroy 7 years after notification is completed	Retain in work unit until destroyed	Risk Management Office
16.11	**Managing Movement & Materials**			
16.11.1	Records of checks that materials are stored in designated storage areas	Destroy 2 years after date of record	Retain in work unit until destroyed	Work Unit
16.11.2	Records of inspection and maintenance of shelving, pallets, pallet trucks, trolleys and other mechanical aids	Destroy 7 years after date of record	Retain in work unit until destroyed	Work Unit
16.12	**Personal Protective Equipment (PPE)**			
16.12.1	PPE supply and replacement records	Destroy 2 years after date of record	Retain in work unit until destroyed	Work Unit
16.12.2	PPE training records	Destroy 3 years after date of training	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.12	**Personal Protective Equipment (PPE) continued**			
16.12.3	Procedures for Personal Protective Equipment – maintenance procedures	Destroy when superseded	Retain in work unit until destroyed	Property & Buildings
16.12.4	Procedures for Personal Protective Equipment – work procedures	Destroy 7 years after procedures are superseded	Retain in work unit until destroyed	Property & Buildings
16.12.5	Records which identify areas where PPE (Personal Protective Equipment) is required eg notes or maps	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.13	**Plant equipment**			
16.13.1	Maintenance access permit system *(for plant equipment which have pressure vessels, or for lists and cranes*)	Destroy 1 month after date of permit expiry	Retain in work unit until destroyed	Maintenance
16.13.2	Maintenance schedules	Destroy 2 years after schedule expires	Retain in work unit until destroyed	Work Unit
16.13.3	Plant Register, including details of: *(history, inspection dates, maintenance, repairs and alterations, service reports, testing records)*	Destroy when plant item is sold or no longer used	Retain in work unit until destroyed	Property & Buildings

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.13	**Plant equipment continued**			
16.13.4	Procedures for Plant Equipment – Isolation and lock-out procedures	Destroy 7 years after procedures are superseded	Retain in work unit until destroyed	Work Unit
16.13.5	Procedures for Plant Equipment – reporting and removal of unsafe plant equipment	Destroy 7 years after procedures are superseded	Retain in work unit until destroyed	Property & Buildings
16.13.6	Procedures for Plant Equipment – includes checklist and schedules for inspection of safety devices	Destroy 7 years after procedures are superseded	Retain in work unit until destroyed	Work Unit
16.13.7	Registration documentation of plant equipment which requires external registration under health and safety legislation	Destroy when plant equipment is superseded	Retain in work unit until destroyed	Work Unit
16.14	**Purchasing**			
16.14.1	Procedures for Purchasing – to ensure compliance with relevant standard	Destroy when superseded	Retain in work unit until destroyed	Financial Operations
16.14.2	Purchase orders ***see FINANCE***			
16.14.3	Purchasing checklists	Destroy 2 years after date of completed checklist	Retain in work unit until destroyed	Work Unit
16.14.4	Safety Standards for purchasing of goods	Destroy when superseded	Retain in work unit until destroyed	Financial Operations

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.15	**Qualifications**			
16.15.1	Qualification verifications for health and safety staff	Destroy when updated or when new staff commence	Retain in work unit until destroyed	Work Unit
16.16	**Radiation Protection**			
16.16.1	Personal Exposure Incident Reports	Destroy 30 years after employee leaves University	Retain in work unit until destroyed	Risk Management Office
16.17	**Staff Issues**			
16.17.1	Induction documentation which relates relevant health and safety information for new staff - eg induction training checklists	Destroy 7 years after employee leaves the department	Retain in work unit until destroyed	Human Resources
16.17.2	Instructions for employees working at customer workplaces which fail to meet EHS standards	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.17.3	Performance appraisals which mention health and safety responsibilities: • Academic staff	Destroy departmental copy 3 years after employee leaves the work unit	Retain in work unit until destroyed	Work Unit
16.17.4	Performance appraisals which mention health and safety responsibilities: • General staff	Destroy 3 years after date of appraisal	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.17	**Staff Issues continued**			
16.17.5	Procedures for Staff – staff procedures and work instructions	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.17.6	Procedures for Staff – supervisory procedures	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.17.7	Task skills matrix showing individual competencies and further training needs	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.17.8	Training needs analysis	Destroy when superseded	Retain in work unit until destroyed	Work Unit
16.17.9	Training records which identify EHS training suitable for employee undertaking work	Destroy 3 years after date of record	Retain in work unit until destroyed	Human Resources
16.17.10	Training records which indicate that ***all employees*** have had specific health and safety training	Destroy work unit copy 7 years after date of record	Retain in work unit until destroyed	Human Resources
16.18	**Waste Disposal**			
16.18.1	EPA Waste Transport Certificates • Green copy *(for waste producer)*	Destroy 2 years after date of certificate	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
16.0	**ENVIRONMENTAL HEALTH & SAFETY continued**			
16.18	**Waste Disposal**			
16.18.2	EPA Waste Transport Certificates • Purple copy (*sent to waste receiver, then sent back to waste producer*)	Send to waste receiver within 7 days of certificate's completion, who then returns certificate back to waste producer within 30 days – after which it is destroyed 2 years after date of certificate	Retain in work unit until destroyed	Work Unit
17.0	**EQUIPMENT see COLLECTION & ASSET MANAGEMENT**			
18.0	**EQUITY & LEARNING**			
	This Keyword covers activities relating to Equity and Learning where the aim is to enhance the lifelong learning of all students through its academic skills programs, and to facilitate the access of students from equity groups, endeavouring to ensure those who gain access receive first rate support services and administrative processes sensitive to individual needs. (Information taken from Academic Services' website.)			
18.1	Learning Skills Unit			
18.1.1	LSU (Learning Skills Unit) Database	Delete data 3 years after student has completed course	Retain in work unit in a secure and accessible form until deleted	Learning Skills Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
18.0	**EQUITY & LEARNING continued**			
18.1.2	LSU (Learning Skills Unit) Workshop Database	Delete data 3 years after date of workshop	Retain in work unit in a secure and accessible form until deleted	Learning Skills Unit
18.1.3	LSU (Learning Skills Unit) Workshop Report	Retain permanently	Transfer to Records Management Program when reference ceases	Learning Skills Unit
18.2	Professional Skills Program			
18.2.1	Professional Skills Program Database • Electronic student attendance records	Delete data 3 years after student has completed the final level of the program	Retain in work unit in a secure and accessible form until deleted	Learning Skills Unit
18.2.2	Leader's information • Copies for administrative use	Destroy or delete each year after the information has been reviewed/updated	Retain in work unit in a secure and accessible form until destroyed or deleted	Learning Skills Unit
18.2.3	Leader's information • Hardcopy for each level of the program, retained by the ELP Library	Retain permanently	Transfer to Records Management Program when reference ceases	Learning Skills Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
18.0	**EQUITY & LEARNING continued**			
18.2	Professional Skills Program continued			
18.2.4	Lesson plans • Electronic • Hardcopy	Destroy or delete each year after the information has been reviewed / updated	Retain in work unit in a secure and accessible form until destroyed or deleted	Learning Skills Unit
18.2.5	Student attendance record • Hardcopy ***(See 18.2.1 PSP database for electronic record)***	Destroy information 3 years after student has completed the final level of the program	Retain in work unit until destroyed	Learning Skills Unit
18.2.6	Student Handbook • Electronic • Hardcopy *(handbook for each PSP level, consisting of reading material and exercises. Only the current year's version is kept electronically.)*	Retain permanently one hardcopy version for each PSP level, Destroy or delete copies each year after the information has been reviewed / updated	Transfer to Records Management Program when reference ceases	Learning Skills Unit
18.2.7	Student Participation • Electronic • Hardcopy *(used to present an annual award for participation at three of the 5 levels: PSP 1 & 2, PSP 3 & 4 and the final level PSP 5)*	Destroy or delete information 3 years after student has completed the final level of the program	Retain in work unit in a secure and accessible form until destroyed or deleted	Learning Skills Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
18.0	**EQUITY & LEARNING continued**			
18.2	Professional Skills Program continued			
18.2.8	Video presentations *(students are video-taped as they give an oral presentation in the final level of the course)*	Destroy at the end of the following semester	Retain in work unit in a secure and accessible form until destroyed	Learning Skills Unit
18.3	StudySmart Program			
18.3.1	StudySmart Program Database	Delete when superseded	Retain in work unit in a secure and accessible form until deleted	Equity Diversity Planning
18.3.2	StudySmart Program Report	Retain permanently	Transfer to Records Management Program when reference ceases	Equity Diversity Planning
19.0	**EXTERNAL ORGANIZATIONS**			
19.1	Business & Industry Bodies (*correspondence between Student Services' work unit & business or industry body which provides evidence of relationship)*	Retain permanently	Transfer to Records Management Program when reference ceases	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
19.0	**EXTERNAL ORGANIZATIONS continued**			
19.2	Business & Industry Bodies (*general information concerning the business or industry body, including association's committee minutes)*	Destroy when reference ceases	Retain in work unit until destroyed	Business or Industry Body
19.3	Professional Associations *(correspondence between Student Services' work unit & association which provides evidence of relationship)*	Retain permanently	Transfer to Records Management Program when reference ceases	Work Unit
19.4	Professional Associations *(general information concerning the professional association, including association's committee minutes)*	Destroy when reference ceases	Retain in work unit until destroyed	Professional Association
20.0	**FINANCE**			
	This section does not cover records created and maintained by Financial Operations. ***For records relating to financial assistance provided to students see FINANCIAL AID.***			
20.1	Accounting Memoranda	Destroy when administrative use has ceased	Retain in work unit until destroyed	Financial Operations / Central Records

Entry	Class/Activity	Disposal Action	Custody	Prime Source
20.0	**FINANCE continued**			
20.2	Budget documentation • Department level • Divisional level • University level • Work Unit level	Destroy when reference ceases as long as the information has been sent to Central Records	Retain in work unit until destroyed	Central Records
20.3	Departmental Pay In Forms (Departmental Copy)	Destroy 2 years after action completed	Retain in work unit until destroyed	Financial Operations
20.4	Internal Orders, Requests for Payment, Delivery Receiving Vouchers, Part Delivery Receiving Vouchers (Departmental Copy)	Destroy 2 years after action completed	Retain in work unit until destroyed	Financial Operations
20.5	MUFAS/Themis Statements *(Information available online)*	Destroy when superseded	Retain in work unit until destroyed	Financial Operations
20.6	Petty Cash Claim Form (Departmental Copy)	Destroy 2 years after action completed	Retain in work unit until destroyed	Financial Operations
20.7	Purchase Orders • Themis generated (previously MUFAS)	Destroy 2 years after action completed	Retain in work unit until destroyed	Financial Operations
20.8	Receipt Books *(online receipts only from 2001)*	Destroy 2 years after date of last entry	Retain in work unit until destroyed	Financial Operations

Entry	Class/Activity	Disposal Action	Custody	Prime Source
20.0	**FINANCE continued**			
20.9	Records concerning the departmental budget planning process	Destroy 2 years after file closed	Retain in work unit until destroyed	Financial Operations / Central Records
20.10	Salary reports	Destroy when reference ceases	Retain in work unit until destroyed	Human Resources
20.11	Telephone charges	Destroy 6 months after date of charge	Retain in work unit until destroyed	Telephone Systems
21.0	**FINANCIAL AID / ASSISTANCE**			
	This Keyword covers activities relating to the provision of financial aid to students in need. Advice and information is also provided on a range of matters such as student loans, bursaries, government assistance eg Youth Allowance, Austudy, Abstudy, budgeting and a range of other matters related to student finances, eg the cost of living. (Information taken from Academic Services' website.)			
	For records relating to departmental finance see FINANCE.			
21.1	Accounts Book (*details weekly loan approvals)*	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
21.2	Bursary (Law Student Society) Applications	Destroy 2 years after determination	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
21.0	**FINANCIAL AID / ASSISTANCE continued**			
21.3	Bursary (Postgraduate) Applications • Successful	Destroy 1 year after determination	Retain in work unit until destroyed	Work Unit
21.4	Bursary (Postgraduate) Applications • Unsuccessful	Destroy 2 years after determination	Retain in work unit until destroyed	Work Unit
21.5	Bursary (Trust Fund) Applications • Successful	Destroy 1 year after determination	Retain in work unit until destroyed	Work Unit
21.6	Bursary (Trust Fund) Applications • Unsuccessful	Destroy 2 years after determination	Retain in work unit until destroyed	Work Unit
21.7	Grant Fund Payment Record	Destroy 2 years after date of approval	Retain in work unit until destroyed	Work Unit
21.8	Housing Bursary Program Database *(student name, contact details, course, financial situation)*	Delete data 7 years after date of payment	Retain in work unit in a secure and accessible form until deleted	Work Unit
21.9	Loan / Grant Cheque Books - Butts	Destroy 7 years after date of last cheque in book	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
21.0	**FINANCIAL AID / ASSISTANCE continued**			
21.10	Long-term Loan Applications • Successful	Destroy 7 years after repayment of loan	Send to Financial Operations to be retained until destruction	Financial Operations
21.11	Long-term Loan Applications • Unsuccessful	Destroy 2 years after date of application	Retain in work unit until destroyed	Work Unit
21.12	Short-term Loan Agreements	Destroy 7 years after repayment of loan	Retain in work unit until destroyed	Work Unit
21.13	Trust Fund Bursary Program Database (*student* n*ame, contact details, personal comments, recommendation)*	Delete data 1 year after determination	Retain in work unit in a secure and accessible form until deleted	Work Unit
22.0	**FREEDOM OF INFORMATION see LEGAL**			

Entry	Class/Activity	Disposal Action	Custody	Prime Source
23.0	**FUNCTIONS (see also Venue & Conference Management)**			
	This section does not cover records created and maintained by the Protocol Office or the Venue and Conference Management Section			
23.1	Invitations received	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
23.2	Records concerning the hiring / booking of venues within the University	Destroy 7 years after reference ceases	Retain in work unit until destroyed	Property Services
23.3	Records concerning administrative arrangements, (such as acceptances, catering, guest lists etc) for ***significant functions.*** For example: • Commemorations • Events organised to mark major anniversaries or events • Launches • Memorials	Retain Permanently	Retain in office for 2 years and then transfer to Records Management Program	Work Unit
23.4	Records concerning administrative arrangements, (such as acceptances, catering, guest lists etc) for ***routine functions.*** For example: • Christmas celebrations	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
24.0	**GRIEVANCES**			
	This keyword covers complaints made to the University either internally or externally, and the process of investigation / resolution of the complaint(s).			
24.1	Complaints involving substantial research and/or the preparation of extensive briefs and reports • Grievances – where Penalty or Disciplinary Action Incurred	Retain Permanently	Retain in work unit for 2 years, then transfer to Records Management Program	Work Unit
24.2	Complaints involving substantial research and/or the preparation of extensive briefs and reports • Grievances – where Penalty or Disciplinary Action Not Incurred	Destroy 7 years following date of decision	Retain in work unit until destroyed	Work Unit
24.3	Complaints involving substantial research and/or the preparation of extensive briefs and reports • Grievances – Not Proven	Destroy 7 years following date of decision	Retain in work unit until destroyed	Work Unit
24.4	***Incident reporting see EHS***			
24.5	Routine letters of complaint received concerning activities of the work unit	Destroy 1 year after action completed	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
25.0	**HEALTH see also COUNSELLING** ***See also SPORT & PHYSICAL RECREATION for fitness assessments etc***			
	This Keyword covers the examination and treatment of medical patients, both staff and students. A range of services are provided including comprehensive general practice patient-care, such as lifestyle advice, vaccinations etc; campus accident and emergency care; and ongoing nursing care. (Information taken from Academic Services website).			
25.1	**Institute of Education (Pre 1989)** NB. Institute of Education Patient records are no longer created as a separate series. Records of former patients from ***MSC/MCAE/ Institute of Education*** are withdrawn from the sequence when the patient re-attends, and are re-processed into the current sequence of patient records for University of Melbourne staff and students.			
25.1.1	**Institute of Education Index cards 1981-1989** (*Index cards to Patient records. Information includes name, address and 4 or 5 digit number linking to envelopes containing patient records. Student and Staff are included in one sequence.)*	Destroy 75 years after last attendance	Transfer to Records Management Program 7 years after last attendance (1996)	Health Service
25.1.2	**Institute of Education Patient records – Staff 1981-1989** (*Documents include: letters and referral information; pathology reports; copies of outward correspondence & reports; medical notes; medical discharge sheets.)*	Destroy 75 years after last attendance	Transfer to Records Management Program 7 years after last attendance (1996)	Health Service
25.1.3	**Institute of Education Patient records – Student 1981-1989** *(Documents include: letters and referral information; pathology reports; copies of outward correspondence & reports; medical notes; medical discharge sheets.)*	Destroy 75 years after last attendance	Transfer to Records Management Program 7 years after last attendance (1996)	Health Service

Entry	Class/Activity	Disposal Action	Custody	Prime Source
25.0	**HEALTH continued**			
25.2	University of Melbourne			
25.2.1	**University of Melbourne - First visit sheets c.1986 –** (*Information includes: Name, ID Number, Address; Sex; Date of birth; Faculty/Department; Year of course; Status; Fee Status; Diagnoses; Seen by; Referred.)*	Destroy 15 years after last attendance	Retain in work unit until destroyed	Health Service
25.2.2	**University of Melbourne - Health Hazard Questionnaires** *See 25.2.3 Patient records & Occupational Health Histories*			
25.2.3	**University of Melbourne - Patient records & Occupational Health Histories - Staff** **1970 –** Initially in card form then patient files. (*Documents include: health hazard questionnaires; letters and referral information; pathology reports; contraceptive history; travel history; test results; medical notes; copies of outward correspondence and reports; copies of medical certificates; registration sheets.)*	Destroy 75 years after patient's last presentation	Retain in work unit until destroyed	Health Service

Entry	Class/Activity	Disposal Action	Custody	Prime Source
25.0	**HEALTH continued**			
25.2	**University of Melbourne continued**			
25.2.4	**University of Melbourne Patient records – Student 1970 –** Initially in card form then patient files. (*Documents include: letters and referral information; pathology reports; contraceptive history; travel history; test results; medical notes; copies of outward correspondence and reports; copies of medical certificates; special consideration forms; registration sheets.)*	Destroy 75 years after patient's last presentation	Transfer to Records Management Program 7 years after last attendance (1996)	Health Service
25.2.5	Occupational Health System Database: (*Employee pre-employment health status declarations, medical opinion, test results and subsequent occupational health related consultation records maintained by the Occupational Health Nurse.)*	Destroy 75 years after patient's last presentation	University Health Service to maintain in a secure and accessible form until destroyed	Health Service
25.2.6	Patient records (Genie system) Database: (*Patient records including summaries of interviews with patients, appointment and billing information, pathology results and referral information.)*	Destroy 75 years after patient's last presentation	University Health Service to maintain in a secure and accessible form until destroyed	Health Service
26.0	**HUMAN RESOURCES see STAFF**			

Entry	Class/Activity	Disposal Action	Custody	Prime Source
27.0	**INDIGENOUS EDUCATION LIAISON**			
	This Keyword relates to the recruitment of and support services to indigenous students. (Information taken from Academic Services' website.)			
27.1	ATAS (Aboriginal Tutorial Assistance Scheme) Contracts (*These are contracts of employment of tutors through the Centre for Indigenous Education.)*	Destroy 7 years after contract expires	Retain in work unit until destroyed	Centre for Indigenous Education
27.2	ATAS Database *(The database contains the following information on contact details of tutors who are interested in tutoring Indigenous students: names of tutors, contact details, tutor qualifications)*	Delete data when superseded	Retain in work unit in a secure and accessible form until deleted	Centre for Indigenous Education
27.3	Student Database *(The database contains the following student contact details: student name, contact details, course, status – full time or part time / undergraduate or postgraduate. The data is copied at the end of each year onto a CD.)*	Destroy 10 years after creation of CD Ensure accessibility of data by copying the CD to new master after 5 years.	Retain in work unit in a secure and accessible form until destroyed	Centre for Indigenous Education
27.4	Student Files (*These records include: student name, contact details, medical certificate, correspondence from faculties & university administration, statement in support of proof of Aboriginality.* ***Note*** *– the medical certificates & statements in support of proof of Aboriginality are prime source records not found elsewhere within the university.*)	Destroy 10 years after completion of degree	Retain in work unit until destroyed	Centre for Indigenous Education

Entry	Class/Activity	Disposal Action	Custody	Prime Source
28.0	**INQUIRIES see ENQUIRIES**			
29.0	**INTERNATIONAL STUDENT SERVICES**			
	This Keyword relates to activities conducted on behalf of International students. Programs conducted by the University range from pre-departure briefings to assistance programs on arrival, orientation programs, social get-togethers, language assistance etc. Advice regarding visas, health cover and an ongoing support service is also available. (Information taken from Academic Services' website.)			
29.1	Airport Pick-up Database *(student name, arrival pick-up information, housing placement, temporary accommodation, final placement), whether the student is participating in programs such as SOAAP (Students on Arrival Assistance Program)).*	Migrate onto CD at the end of each semester Delete 2 years after Migration	Retain in work unit in a secure and accessible form until destroyed	Student Housing
29.2	Airport Pick-up Reports *(statistical information used to indicate trends)*	Retain permanently	Transfer to Records Management Program when reference ceases	International Student Services
29.3	**AUSAID**			
29.3.1	AUSAID Database	***Not Applicable to this schedule as database is maintained by the Federal Department of Foreign Affairs***		

Entry	Class/Activity	Disposal Action	Custody	Prime Source
29.0	**INTERNATIONAL STUDENT SERVICES continued**			
29.3	**AUSAID continued**			
29.3.2	AUSAID Invoices *(student name, course, cost, invoice amount, advice amount, status)*	Destroy 7 years after date of invoice	Retain in work unit until destroyed	International Student Services
29.3.3	AUSAID Medibank Private Health Insurance Payment Schedules	Destroy 7 years after date of schedule	Retain in work unit until destroyed	Financial Operations
29.3.4	AUSAID Program Student Files *(student name, application, case notes, personal correspondence, academic progress reports, passport/visa details of family, academic transcripts, references)*	Destroy 7 years after completion of course	Retain in work unit until destroyed	International Student Services
29.3.5	AUSAID Travel Itineraries *(basic itinerary details, including flight details, for students returning home, arranged by cost item and kept separate to the students' files).*	Destroy 5 years after date of itinerary	Retain in work unit until destroyed	International Student Services
29.4	Diary of daily events	Destroy 8 years after diary closed	Retain in work unit until destroyed	International Student Services
29.5	Electronic Confirmations (of Enrolment) (*from Immigration database*: *student name, Medibank details, passport details, visa details*)	Destroy 3 years after issue of confirmation	Retain in work unit until destroyed / deleted	International Student Services

Entry	Class/Activity	Disposal Action	Custody	Prime Source
29.0	**INTERNATIONAL STUDENT SERVICES continued**			
29.6	Enrolments - Variation *(form submitted by student detailing changes to course of study, entered into Immigration database)*	Destroy 3 years after variation of enrolment is issued	Retain in work unit until destroyed	International Student Services
29.7	ESL (English as a Second Language) Program Records *(ESL teachers run classes for **spouses** of International students. Sometimes pre-school age children attend as well*. • Registration / attendance records	Destroy 7 years after registration / attendance date	Retain in work unit until destroyed	International Student Services
29.8	ESL (English as a Second Language) Program Records • Program summary / report	Retain Permanently	Transfer to Records Management Program when reference ceases	International Student Services
29.9	**Field Trips Program**			
29.9.1	Field Trips Program • Consent forms	Destroy 7 years after date of form	Retain in work unit until destroyed	Faculty of Education
29.9.2	Field Trips Program • Credit card payments • Signed authorisation	Destroy 2 years after date of last payment	Retain in work unit until destroyed	Financial Operations / Faculty of Education

Entry	Class/Activity	Disposal Action	Custody	Prime Source
29.0	**INTERNATIONAL STUDENT SERVICES continued**			
29.9	**Field Trips Program continued**			
29.9.3	Field Trips Program • Database *(NB: database no longer in use from 2003 onwards, Previously used by International Student Services, but not required by the Faculty)*	Data is transferred onto CD at end of each semester. Destroy CD 7 years after date of CD creation.	Retain in work unit in a secure and accessible form until destroyed	Faculty of Education
29.9.4	Field Trips Program • Medical forms	Destroy 7 years after date of form	Retain in work unit until destroyed	Faculty of Education
29.9.5	Field Trips Program • Receipts	Destroy 7 years after last date	Retain in work unit until destroyed	Faculty of Education
29.9.6	Field Trips Program • Reports *(lists of names per trip)*	Destroy 7 years after date of report	Retain in work unit until destroyed	Faculty of Education
29.10	Immigration / ESOS Requirements • GQL (General Query Language) Reports *(GQL reports are issued from MERLIN - soon to be THEMIS - then checked for accuracy before the data is entered into the Commonwealth DEST (Dept. of Education, Science & Training) database for compliance purposes.)*	Destroy 3 years from date of query	Retain in work unit until destroyed	International Student Services

Entry	Class/Activity	Disposal Action	Custody	Prime Source
29.0	**INTERNATIONAL STUDENT SERVICES continued**			
29.11	Immigration Department correspondence *(Generally emails on issues such as visa requirements, transcripts of results or the level of support sought by student. Information provided may be used by the Immigration Department in deciding on whether or not to extend a student visa etc)*	Destroy 7 years after last date	Retain in work unit until destroyed	International Student Services
29.12	International Student Case Notes *(Includes Botswana & IDP students)*	Destroy 7 years after date of last entry	Retain in work unit until destroyed	International Student Services
29.13	International Student Services Program records *(Voluntary recruitment programs such as Language Partners, UniFriends and SOAAP (Students on Arrival Assistance Program)* Includes: • Application forms • Details of who is paired with whom	Destroy 7 years after last date	Retain in work unit until destroyed	International Student Services
29.14	International Student Services Program Reports *(such as Language Partners, UniFriends and SOAAP (Students on Arrival Assistance Program)*	Retain Permanently	Transfer to Records Management Program when reference ceases	International Student Services

Entry	Class/Activity	Disposal Action	Custody	Prime Source
29.0	**INTERNATIONAL STUDENT SERVICES continued**			
29.15	**Melbourne Welcome Program**			
29.15.1	Melbourne Welcome Program: • Acknowledgement forms *(Every student who participates in the program from 2003 onwards has to sign a "Briefing acknowledgement form" stating that the student has been provided with an explanation of the activities of the program, free time, general safety and acceptable behaviour rules.* *The student also has to sign an "Acknowledgement form" stating that he/she is responsible for his/her own behaviour during their free time period.)*	Destroy 7 years after form completed	Retain in work unit until destroyed	International Student Services
29.15.2	Melbourne Welcome Program: • Credit card payments & receipts • Signed authorisations	Destroy 2 years after date of receipt	Retain in work unit until destroyed	Financial Operations
29.15.3	Melbourne Welcome Program: • Database *(student name, contact details, dietary habits, medical requirements)*	Data is transferred onto CD at end of each semester. Destroy CD 2 years after date of CD creation.	Retain in work unit in a secure and accessible form until destroyed	International Student Services

Entry	Class/Activity	Disposal Action	Custody	Prime Source
29.0	**INTERNATIONAL STUDENT SERVICES continued**			
29.15	**Melbourne Welcome Program**			
29.15.4	Melbourne Welcome Program: • Program information	Destroy the following semester	Retain in work unit until destroyed	International Student Services
29.15.5	Melbourne Welcome Program: • Reports *(lists of students sent to accommodation administrators*)	Destroy 2 years after date of report	Retain in work unit until destroyed	International Student Services
29.16	Orientation / Intercultural Working Party Records	Destroy the following semester	Retain in work unit until destroyed	International Student Services
29.17	Reference Letter Database	Delete 5 years after creation date	Retain in work unit in a secure and accessible form until destroyed	International Student Services
29.18	Request for letters from the University	Destroy 1 year from date of issue	Retain in work unit until destroyed	International Student Services

Entry	Class/Activity	Disposal Action	Custody	Prime Source
30.0	**LEADERSHIP**			
	This Keyword relates to activities relating to the Leadership Program. The program provides students with the opportunity to enhance their experience at the University of Melbourne by getting involved in community service and leadership seminars and workshops. The participants actively encourage each other to follow through their initiatives by combining the worthiness of ideas with the necessity of action. (Information taken from Academic Services' website.)			
30.1	Attendance Roll / Enrolment	Destroy 3 years after date of attendance	Retain in work unit until destroyed	Leadership Program
30.2	Resource Kit Information *(community organizations' information)*	Destroy when superseded	Retain in work unit until destroyed	Leadership Program
30.3	SALP (Student Ambassador Leadership Program) Database	Delete data 3 years after the completion of each year's program	Retain in work unit in a secure and accessible form until deleted	Leadership Program
30.4	SALP (Student Ambassador Leadership Program) Reports *(Report sent to the SALP Advisory Board)*	Retain permanently	Transfer to Records Management Program when reference ceases	Leadership Program
30.5	SALP (Student Ambassador Leadership Program**)** Seminar Papers	Destroy 3 years after date of program	Retain in work unit until destroyed	Leadership Program
30.6	SALP (Student Ambassador Leadership Program) Student Files *(applications, community service proposals)*	Destroy 3 years after completion of course	Retain in work unit until destroyed	Leadership Program

Entry	Class/Activity	Disposal Action	Custody	Prime Source
31.0	**LEGAL**			
	This Keyword covers activities relating to legal matters and includes: contracts and agreements, compliance issues, legal actions, policies and procedures, etc.			
31.1	Agreements - contracts and agreements for use of the final product / research outcomes *(collaborative agreements, inter-organisational research agreements, memoranda of understanding, patents)*	Retain permanently	Send originals to Central Records	Central Records
31.2	Compliance with mandatory accountability, fiscal, legal, regulatory or quality standards or requirements to which the University is subject; For example – Copyright, FOI, Negligence/Duty of Care, Privacy, Trade Practices, Students Off Campus • Investigations into & resolution of serious breaches or failures to meet compliance requirements	Destroy 10 years after resolution of investigation	Send originals to Central Records	Central Records
31.3	Compliance with mandatory accountability, fiscal, legal, regulatory or quality standards or requirements to which the University is subject; For example – Copyright, FOI, Negligence/Duty of Care, Privacy, Trade Practices, Students Off Campus • Minor breaches or failures to meet compliance requirements	Destroy 5 years after date of last documentation	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
31.0	**LEGAL continued**			
31.4	Compliance with mandatory accountability, fiscal, legal, regulatory or quality standards or requirements to which the University is subject; For example – Copyright, FOI, Negligence/Duty of Care, Privacy, Trade Practices, Students Off Campus • Proof of compliance	Destroy when superseded	Retain in work unit until destroyed	Work Unit
31.5	Compliance with mandatory accountability, fiscal, legal, regulatory or quality standards or requirements to which the University is subject; For example – Copyright, FOI, Negligence/Duty of Care, Privacy, Trade Practices, Students Off Campus • Copies of legislation, by-laws etc • Reference material • Routine correspondence	Destroy when superseded	Retain in work unit until destroyed	Work Unit
32.0	**MAIL**			
32.1	Address Lists	Destroy when superseded	Retain in work unit until destroyed	Work Unit
32.2	Books provided by the mail service - e.g. couriers to record each pickup & delivery of mail	Destroy 2 years after action completed	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
32.0	**MAIL continued**			
32.3	Customer copies of other records relating to mail delivery and dispatch	Destroy 2 years after action completed	Retain in work unit until destroyed	Work Unit
32.4	Mailing Lists	Destroy when administrative use has ceased	Retain in work unit until destroyed	Work Unit
33.0	**MARKETING**			
	This section does not cover records created and maintained by Marketing & Recruitment (Offshore) & (Onshore).			
33.1	Galley proofs, bromides, camera ready copies, mock ups etc	Destroy when administrative use has ceased	Retain in work unit until destroyed	Work Unit
33.2	Master set of publications including newsletters and brochures	Retain Permanently	Transfer to Records Management Program when reference ceases	Work Unit
33.3	Records concerning allocation and placement of advertising	Destroy 4 years after administrative use ceases	Retain in office until destroyed	Work Unit
33.4	Records relating to the design, artwork, printing, copying, binding, production, storage and distribution of promotional material	Destroy 2 years after action completed	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
34.0	**MARKETING & RECRUITMENT - see also ADMISSIONS**			
	This Keyword covers activities relating to the recruitment of students to the University. Information is provided to prospective Australian and international students about admissions issues, and the Admissions Office publishes various brochures and handbooks of interest to prospective students, parents and teachers, including publications relating to TAP, the International Baccalaureate, the Fees Schedule and the Arrangements Relating to the Payment of Fees. (Information taken from Academic Services' website.)			
	For records relating to general marketing matters see MARKETING.			
34.1	**Marketing & Recruitment (Offshore)**			
34.1.1	Agent / Representative Contracts *(contracts with parties who market to or recruit international fee-paying students on behalf of the University of Melbourne)*	Destroy 7 years after date of contract	Retain in work unit until destroyed	Marketing & Recruitment (Offshore)
34.1.2	Agent / Representative Correspondence *(official correspondence with parties who market to or recruit international fee-paying students on behalf of the University of Melbourne)*	Retain permanently	Transfer to Records Management Program when reference ceases	Marketing & Recruitment (Offshore)
34.1.3	Agent / Representative Database *(contact details, mail-out preferences about parties who market to or recruit international fee-paying students on behalf of the University of Melbourne)*	Delete data when superseded	Retain in work unit until deleted	Marketing & Recruitment (Offshore)

Entry	Class/Activity	Disposal Action	Custody	Prime Source
34.0	**MARKETING & RECRUITMENT continued**			
34.1	**Marketing & Recruitment (Offshore)**			
34.1.4	Agent / Representative Performance Reviews *(performance reviews with parties* who *market to or recruit international fee-paying students on behalf of the University of Melbourne)*	Destroy when administrative use has ceased	Retain in work unit until destroyed	Marketing & Recruitment (Offshore)
34.1.5	Country / Region Market Summaries *(market description, key statistics, trends and policies likely to affect flows of students to Australia and to the University of Melbourne)*	Retain permanently	Transfer to Records Management Program when reference ceases	Marketing & Recruitment (Offshore)
34.1.6	Marketing Contracts	Retain permanently	Send originals to Central Records	Central Records
34.1.7	Marketing Plans	Destroy when administrative use has ceased	Retain in work unit until destroyed	Marketing & Recruitment (Offshore)
34.1.8	Overseas Agents Schedule of Events *(hardcopy of overseas agents- IDP consultant ,details re kinds of support services offered)*	Destroy semester following date of schedule	Retain in work unit until destroyed	Marketing & Recruitment (Offshore)

Entry	Class/Activity	Disposal Action	Custody	Prime Source
34.0	**MARKETING & RECRUITMENT continued**			
34.1	**Marketing & Recruitment (Offshore)**			
34.1.9	Records and reports relating to Discovery Week for Representatives	Destroy 2 years after action completed	Retain in work unit until destroyed	Marketing & Recruitment (Offshore)
34.1.10	Study Abroad Contracts	Retain permanently	Send originals to Central Records	Central Records
34.2	**Marketing & Recruitment (Onshore)**			
34.2.1	National Recruitment Program Reports (*such as : Melbourne Access Program, Tertiary Information Service, Schools Partnership Program-International, Campus Tour Program, School Visits/ Public Expos, UniSummit, Master Class, Course Information Day, UniExperience, START@MelbourneSchool Holiday Session,)*	Retain permanently	Transfer to Records Management Program when reference ceases	Marketing & Recruitment (Onshore)
34.2.2	National Recruitment Activities Annual Summary Report	Retain permanently	Transfer to Records Management Program when reference ceases	Marketing & Recruitment (Onshore)

Entry	Class/Activity	Disposal Action	Custody	Prime Source
34.0	**MARKETING & RECRUITMENT continued**			
34.2	**Marketing & Recruitment (Onshore)**			
34.2.3	National Recruitment Program Files • Electronic version • Hardcopy version	Delete or Destroy 3 years after date of program	Retain in work unit in a secure and accessible form until deleted or destroyed	Marketing & Recruitment (Onshore)
34.2.4	Open Day / Orientation Day / Discovery Day	Destroy when reference ceases	Retain in work unit until destroyed	
34.2.5	Schools Database *(names & addresses of secondary schools)*	Delete data when superseded	Retain in work unit in a secure and accessible form until deleted	Marketing & Recruitment (Onshore)
34.2.6	Tracking Database (*mailing list for students who have attended activities)*	Delete data 3 years after input	Retain in work unit in a secure and accessible form until deleted	Marketing & Recruitment (Onshore)
35.0	**OCCUPATIONAL HEALTH & SAFETY see ENVIRONMENTAL HEALTH & SAFETY (EHS)**			
36.0	**PARKING see TRANSPORT & TRAVEL**			

Entry	Class/Activity	Disposal Action	Custody	Prime Source
37.0	**PERSONNEL see STAFF**			
38.0	**PLANNING**			
38.1	Records relating to Divisional planning	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
38.2	Records relating to contributions to University strategic plans	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
38.3	Records relating to Work Unit planning	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
39.0	**PRINTING**			
39.1	Design Print Centre Requisitions (departmental copy)	Destroy when reference ceases	Retain in work unit until destroyed	Design & Print Centre
40.0	**PRIVACY see LEGAL**			

Entry	Class/Activity	Disposal Action	Custody	Prime Source
41.0	**PUBLICATIONS**			
41.1	Annual Report • Contributions made to the University Annual Report	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
41.2	Annual Report • External to the Work Unit	Destroy when reference ceases	Retain in work unit until destroyed	Work Unit
41.3	Annual Report • Produced by the Work Unit	Retain Permanently	Transfer to Records Management Program when reference ceases	Work Unit
41.4	Master set of publications produced by the work unit including: • Books • Booklets • Brochures • Handbooks • Newsletters	Retain Permanently	Transfer 2 samples to Records Management Program when reference ceases	Work Unit
41.5	Publications received from other University departments or from external organizations	Destroy when administrative use ceases	Retain in work unit until destroyed	Other University Departments or External Organizations

Entry	Class/Activity	Disposal Action	Custody	Prime Source
41.0	**PUBLICATIONS continued**			
41.6	Records relating to the amendment and updating of entries in internal and external publications	Destroy when administrative use ceases	Retain in work unit until destroyed	Work Unit
41.7	Requisitions for Desktop Publishing (departmental copy)	Destroy when administrative use ceases	Retain in work unit until destroyed	Design & Print Centre
42.0	**RECORDS MANAGEMENT & ARCHIVES**			
42.1	Circulars	Destroy when superseded or administrative use ceases	Retain in work unit until destroyed	Central Records
42.2	Listing of records destroyed according to records disposal schedules and Specific Authorities for Destruction (SAD)	Retain Permanently	Retain permanently in work unit	Work Unit
42.3	Records Transfer Documentation (*details of records transferred to Intermediate Storage or University of Melbourne Archives*)	Retain Permanently	Retain permanently in work unit	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS**			
	This Keyword covers activities relating to the provision of scholarships (undergraduate and postgraduate) and student exchange programs in the support of scholastic excellence. (Information taken from Academic Services' website.)			
43.1	**Postgraduate Scholarships**			
43.1.1	Applications • Successful *(includes Travelling Scholarships. Excludes PhDs & Masters by Research Courses MSc, MOptom & MIS:* *they contain: application, scholarship leave requests, thesis allowance claims, extensions)*	Destroy 3 years after completion of course	Retain in work unit until destroyed	Postgraduate Scholarships
43.1.2	Applications • Successful PhDs • Masters by Research Courses (MSc, MOptom & MIS)	Send to School of Graduate Studies		School of Graduate Studies
43.1.3	Applications • Successful but declined • Unsuccessful • Withdrawn	Destroy 2 years after notification	Retain in work unit until destroyed	Postgraduate Scholarships
43.1.3	Applications • Successful but declined	Destroy 1 year after notification of decline	Retain in work unit until destroyed	Postgraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.1	**Postgraduate Scholarships continued**			
43.1.4	Applications • Unsuccessful International Applications • Withdrawn	Return to International Admissions. Destroy 2 years after determination.	Retain in work unit until destroyed	International Admissions
43.1.5	Applications • Unsuccessful Local / National Applications	Destroy 2 years after determination	Retain in work unit until destroyed	Postgraduate Scholarships
43.1.6	Applications • Withdrawn	Destroy 1 year after withdrawal	Retain in work unit until destroyed	Postgraduate Scholarships
43.1.7	Excel Spreadsheets to Manage Scholarships • personal data	Delete personal data 3 years after completion of scholarship	Retain in work unit in a secure and accessible form until deleted	Postgraduate Scholarships
43.1.8	Excel Spreadsheets to Manage Scholarships • non personal data	Retain permanently	Transfer to Records Management Program when reference ceases	Postgraduate Scholarships
43.1.9	Postgraduate Trust Fund Scholarship files	Destroy 3 years after completion of course	Retain in work unit until destroyed	Postgraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.1	**Postgraduate Scholarships continued**			
43.1.10	Scholaps' Postgraduate Scholarships Database (*student name, course applied for, scholarship eligibility, Department planned to study at, scholarship scoring, scholarship offer)* • personal data	Delete personal data 3 years after completion of scholarship	Retain in work unit in a secure and accessible form until deleted	Postgraduate Scholarships
43.1.11	Scholaps' Postgraduate Scholarships Database • non personal data	Retain permanently the non personal data	Retain in work unit in a secure and accessible form	Postgraduate Scholarships
43.1.12	Scholarship Scoring Sheets *(these are frequently referred to in order to respond to unsuccessful applicants, and are part of the application documentation)*	Destroy 2 years after determination	Retain in work unit until destroyed	Postgraduate Scholarships
43.1.13	Trust Fund Scholarships (*student name, scholarship information, completed application, letter of offer, acceptance of offer, summary of intended research subject, copy of academic record, curriculum vitae, academic referee's report, payment details)*	Destroy 3 years after completion of scholarship	Retain in work unit until destroyed	Postgraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.2	**Undergraduate Scholarships**			
43.2.1	Academic Progress - hardcopy (*student name, course details, results, action performed with student)*	Place on Undergraduate Scholarship Student File		Undergraduate Scholarships
43.2.2	Academic Progress - electronic copy	Delete data 7 years after date of results	Retain in work unit in a secure and accessible form until deleted	Undergraduate Scholarships
43.2.3	Exchange Database (*student name, contact details, travel destination, length of trip, study area)*	Delete data 10 years after input	Retain in work unit in a secure and accessible form until deleted	Student Exchanges
43.2.4	Exchange Summary Report	Retain permanently	Transfer to Records Management Program when reference ceases	Student Exchanges
43.2.5	Exchanges Partner Institution Files (c*orrespondence between faculties, institutions & organizations, program information, practical applications of Agreements)*	Destroy 8 years from date of creation	Retain in work unit until destroyed	Student Exchanges

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.2	**Undergraduate Scholarships continued**			
43.2.6	Exchange Student Files (*student name, contact details, degree details, travel destination, overseas university details, study area, problems identified, correspondence between universities, financial information)*	Destroy 8 years from date of creation	Retain in work unit until destroyed	Student Exchanges
43.2.7	Faculty Nomination Forms (*student name, student number, course, Faculty recommendation)*	Destroy 5 years after selection	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.8	Melbourne Abroad Selection Round Reports	Retain permanently	Send to Melbourne Scholarships Policy Committee & also to Undergraduate Scholarships Committee	Melbourne Scholarships Policy Committee, Undergraduate Scholarships Committee
43.2.9	Melbourne Abroad & Travelling Scholarship Applications • Successful	Destroy 8 years from date of application	Retain in work unit until destroyed	Undergraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.2	**Undergraduate Scholarships continued**			
43.2.10	Melbourne Abroad & Travelling Scholarship Applications • Successful but declined • Unsuccessful	Destroy 2 years after decline or determination	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.11	Reconciliation Payments	Destroy 7 years after completion of scholarship	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.12	Relocation Allowance Files (*student name, banking details, letter of offer, nomination form, one-of payments, student record card)*	Destroy 7 years from date of payment	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.13	Scholarship Scoring Sheets	Destroy 5 years after date of creation	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.14	Scholarships Selection *(VTAC printouts of personal high school student information)* • Electronic version • Hardcopy version	Delete or Destroy 5 years after selection date	Retain in work unit in a secure and accessible form until deleted or destroyed	Undergraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.2	**Undergraduate Scholarships continued**			
43.2.15	Scholarship Selection Lists - web version (*student name, student number, high school, course, status – decline/accept/pending)*	Delete when superseded	Retain on web until deleted	Undergraduate Scholarships
43.2.16	Scholarship Selection Lists - hardcopy	Destroy 10 years after selection round	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.17	Selection Data Speadsheets • Melbourne Abroad • Further Financial Funding • Melbourne Travel Assistance	Delete electronic version & Destroy hardcopy 10 years after selection round	Retain in work unit in a secure and accessible form until deleted and destroyed	Undergraduate Scholarships
43.2.18	Undergraduate Scholarships Annual Report	Retain permanently	Send to Melbourne Scholarships Policy Committee	Melbourne Scholarships Policy Committee
43.2.19	Undergraduate Scholarship Applications • Successful (*student name, student number, contact details, high school, course preferences, scholarship application forms)*	Place on Student File		Undergraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
43.0	**SCHOLARSHIPS continued**			
43.2	**Undergraduate Scholarships continued**			
43.2.20	Undergraduate Scholarship Applications • Successful but declined	Destroy 18 months after date of decline	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.21	Undergraduate Scholarship Applications • Ineligible • Unsuccessful • Withdrawn	Destroy 2 years after determination or withdrawal	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.22	Undergraduate Scholarships Exchange Database	Delete personal information 10 years after date of input	Retain in work unit in a secure and accessible form until deleted	Undergraduate Scholarships
43.2.23	Undergraduate Scholarships Exchange Student Files	Destroy 7 years after completion of scholarship	Retain in work unit until destroyed	Undergraduate Scholarships
43.2.24	Undergraduate Scholarship Student Files (*student name, application, offer, banking details, changes to courses, conditions of scholarship)*	Destroy 7 years after completion of scholarship	Retain in work unit until destroyed	Undergraduate Scholarships

Entry	Class/Activity	Disposal Action	Custody	Prime Source
44.0	**SECURITY**			
	This section does not cover records created and maintained by Property & Buildings (P&B)			
44.1	Key Requests	Destroy when action has been completed and Key Register updated	Retain in work unit until destroyed	Work Unit
44.2	Register of Keys and Control Cards	Destroy when superseded	Retain in work unit until destroyed	Work Unit
44.3	Theft Incident Forms	Destroy 7 years after date of form	Retain in work unit until destroyed	Work Unit
45.0	**SERVICES**			
	This section does not cover records created and maintained by Property & Buildings (P&B)			
45.1	Documentation relating to stationery supplies	Destroy 1 year after date of documentation	Retain in work unit until destroyed	Work Unit
45.2	Telephone Account Code Details Reports	Destroy when administrative use ceases	Retain in work unit until destroyed	Telephone Systems
46.0	**SOCIAL EXCHANGES**			
46.1	Letters of appreciation, condolence, congratulations, seasonal greetings	Destroy when administrative use ceases	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
47.0	**SPORT & PHYSICAL RECREATION**			
	This Keyword relates to sport and recreational activities provided for the University Community including students, staff and graduates.			
47.1	Annual Locker Applications	Destroy 1 month after date of payment	Retain in work unit until destroyed	Lockers Database
47.2	Lockers Database • Permanent locker applicants	Delete and update information each January	Retain in work unit in a secure and accessible form until deleted	Sport & Physical Recreation Centre
47.3	**Athletics/ Sport Clubs**			
47.3.1	Athlete Funding Support Application	Destroy 1 month after date of travel	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.2	Athlete/Official Personal Medical Forms	Destroy 10 years after date of form	Retain in work until destroyed	Sport & Physical Recreation Centre
47.3.3	Athlete/Official Team Agreement	Destroy 7 years after date of agreement	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.4	Club Bookings Request Forms	Destroy 7 years after date of form	Retain in work unit until destroyed	Centaman Database

Entry	Class/Activity	Disposal Action	Custody	Prime Source
47.0	**SPORT & PHYSICAL RECREATION continued**			
47.3	**Athletics/ Sport Clubs continued**			
47.3.5	Club Contact Sheets	Destroy when superseded	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.6	Club Key Access Lists	Destroy when superseded	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.7	Club Requisition Forms (for equipment)	Destroy 1 year after date of form	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.8	Elite Athletes Database *(name, sport, address, funding)*	Retain permanently	Retain permanently in work unit in a secure and accessible form	Sport & Physical Recreation Centre
47.3.9	MUS (Melbourne University Sport) - Club Access Forms	Return form to Club once information has been entered into Centaman Database		Sports Clubs
47.3.10	MUS (Melbourne University Sport) - Registration Forms	Destroy 7 years after date of form	Retain in work unit until destroyed	Centaman Database

Entry	Class/Activity	Disposal Action	Custody	Prime Source
47.0	**SPORT & PHYSICAL RECREATION continued**			
47.3	**Athletics/ Sport Clubs continued**			
47.3.11	MUSA (Melbourne University Sports Association) - Blues Database	Retain permanently Tranfer to CD every 5 years, then copy original CD every 5 years thereafter to ensure accessibility	Retain permanently in work unit in a secure and accessible form	Sport & Physical Recreation Centre
47.3.12	MUSA (Melbourne University Sports Association) - Blues and Half Blues Nomination Forms	Destroy after annual Blues Dinner	Retain in work unit until destroyed	Blues Database
47.3.13	MUSA (Melbourne University Sports Association) - Club Support Funding Program Applications	Destroy 5 years after date of application	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.14	MUSA (Melbourne University Sports Association) - Election Nomination Forms	Destroy 1 month after annual MUSA Council meeting	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.3.15	MUSA (Melbourne University Sports Association) - Sports Scholarship Applications	Destroy after annual Blues Dinner	Retain in work unit until destroyed	Scholarship Database

Entry	Class/Activity	Disposal Action	Custody	Prime Source
47.0	**SPORT & PHYSICAL RECREATION continued**			
47.3	**Athletics/ Sport Clubs continued**			
47.3.16	Scholarship Database *(information relating to awarding of sports scholarship)*	Retain permanently Tranfer to CD every 5 years, then copy original CD every 5 years thereafter to ensure accessibility	Retain permanently in work unit in a secure and accessible form	Sport & Physical Recreation Centre
47.3.17	Team Manager Nomination Forms	Destroy 1 year after date of form	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.4	Building Project Records (where Sports is the prime source – ie they are not duplicated by Property & Buildings)	Retain permanently	Transfer to Records Management Program when reference ceases	Sport & Physical Recreation Centre
47.5	**Bookings**			
47.5.1	Alpine Lodge Booking Applications	Destroy 7 years after information entered into Centaman Database	Retain in work unit until destroyed	Centaman Database
47.5.2	Bookings Request Forms	Destroy 7 years after information entered into Centaman Database	Retain in work unit until destroyed	Centaman Database

Entry	Class/Activity	Disposal Action	Custody	Prime Source
47.0	**SPORT & PHYSICAL RECREATION continued**			
47.6	**CENTAMAN Database**			
47.6.1	CENTAMAN Database • Bookings	Delete when administrative use ceases	Retain in work unit in a secure and accessible form until deleted	Sport & Physical Recreation Centre
47.6.2	CENTAMAN Database • Classes	Delete when administrative use ceases	Retain in work unit in a secure and accessible form until deleted	Sport & Physical Recreation Centre
47.6.3	CENTAMAN Database • Membership	Delete 10 years after last entry	Retain in work unit in a secure and accessible form until deleted	Sport & Physical Recreation Centre
47.6.4	CENTAMAN Daily Banking Report	Destroy 6 months after date of report	Retain in work unit until destroyed	Financial Operations
47.6.5	CENTAMAN Monthly Budgetary & Planning Report	Destroy 1 year after date of report	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.6.6	CENTAMAN Final Year Budgetary & Planning Report	Retain permanently	Transfer to Records Management Program when reference ceases	Sport & Physical Recreation Centre

Entry	Class/Activity	Disposal Action	Custody	Prime Source
47.0	**SPORT & PHYSICAL RECREATION continued**			
47.7	**Weightroom**			
47.7.1	Body Composition Assessment	Destroy 10 years after date of assessment	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.7.2	Fitness Assessment Forms	Destroy 10 years after date of assessment	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.7.3	Health Assessment Questionnaires *(for Fitness Assessment Consultations only*)	Destroy 10 years after date of questionnaire	Retain in work unit until destroyed	Sport & Physical Recreation Centre
47.7.4	Weightroom Database	Delete data when administrative use ceases	Retain in work unit in a secure and accessible form until deleted	Sport & Physical Recreation Centre

48.0	**STAFF**
	This section does not cover records created and maintained by Human Resources
	This section does not cover records created and maintained by Staff Development and Training

Entry	Class/Activity	Disposal Action	Custody	Prime Source
48.0	**STAFF**			
48.1	Attendance Records	Destroy 1 year after date of record	Retain in work unit until destroyed	Work Unit
48.2	Brochures, leaflets, and booklets containing details of conferences, workshops, training programs ***see 11. CONFERENCES & SEMINARS***			
48.3	**Casual Staff**			
48.3.1	Casual Staff Contract Forms	Destroy 7 years after termination of employment	Retain in work unit until destroyed	Human Resources
48.3.2	Payment to Casual Staff (department copy)	Destroy 1 year after action completed	Retain in work unit until destroyed	Human Resources
48.3.3	Payroll Registration Forms for Casual Staff	Destroy 1 month after termination of employment	Retain in work unit until destroyed	Human Resources
48.4	General Staff Appraisal Reports	Destroy 3 years after the appraisal is completed	Place on a separate file to the staff file and retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
48.0	**STAFF continued**			
48.5	Genesys / Themis Reports	Destroy at the end of the calendar year	Retain in work unit until destroyed	Genesys / Themis
48.6	Induction training information	Destroy when superseded	Retain in work unit until destroyed	Work Unit
48.7	Leave balances	Destroy when superseded	Retain in work unit until destroyed	Human Resources
48.8	Position Descriptions	Destroy when superseded	Retain in work unit until destroyed	Human Resources
48.9	Records relating to attendance/participation at training activities such as seminars, conferences, workshops, residential programs ***See 11. CONFERENCES & SEMINARS*** ***See 52.3 – 52.4 TRANSPORT & TRAVEL*** *for records associated with Partially / Fully Funded Travel)*			
48.10	Sick Leave *(Human Resources requires that Medical certificates and Statutory declarations in support of sick leave applications are maintained within departments for 2 years after the date of the leave)* ***See also 48.12 Staff Files***	Destroy 2 years after date of leave	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
48.0	**STAFF continued**			
48.11	Staff Diaries and Appointment Books	Destroy when administrative use ceases	Retain in work unit until destroyed	Work Unit
48.12	Staff Files (*maintained in work unit. These records should include: copies of leave applications, performance appraisals)* ***See also 48.10 Sick Leave***	Destroy 1 year after termination or transfer of employment. Ensure that any original documents have been forwarded to Human Resources.	Retain in work unit until destroyed	Human Resources
48.13	Unsolicited Letters & applications (*seeking employment or placement of persons)*	Destroy 1 year after date of letter or application	Retain in work unit until destroyed	Work Unit
48.14	Unsuccessful Applications (*where the recruitment has not been handled by Human Resources)*	Destroy 2 years after the date of appointment	Retain in work unit until destroyed	Work Unit
49.0	**STUDENT HOUSING**			
	This Keyword relates to student housing activities provided by the University. There is a range of information and accommodation services available including accommodation options for new students from rural areas, interstate or overseas; share housing, rental accommodation and homestay information; airport arrival and temporary accommodation services; tenancy advice and referral; and emergency housing. (Information taken from Academic Services' website.)			

Entry	Class/Activity	Disposal Action	Custody	Prime Source
49.0	**STUDENT HOUSING continued**			
49.1	**Accomnet**			
49.1.1	Accomnet • Annual Statistical Report	Retain permanently	Transfer to Records Management Program when reference ceases	Student Housing
49.1.2	Accomnet • Database	Delete data 2 years after date of initial posting	Retain in work unit in a secure and accessible form until deleted	Student Housing
49.1.3	Accomnet • Noticeboard Advertisements (hardcopy)	Destroy 2 weeks after initial posting	Retain in work unit until destroyed	Student Housing
49.2	Ex Tenant Files (electronic) *(associated with MUSH – Melbourne University Student Housing)*	Delete individual student data 7 years after last date	Retain in work unit in a secure and accessible form until deleted	Student Housing
49.3	First Queries	Destroy 6 months from date of query	Retain in work unit until destroyed	Student Housing

Entry	Class/Activity	Disposal Action	Custody	Prime Source
49.0	**STUDENT HOUSING continued**			
49.4	**Priority Placement**			
49.4.1	International Student Temporary Accommodation (*student name, gender, country of origin, arrival date, flight details, anticipated length of stay)*	Destroy following semester	Retain in work unit until destroyed	International Services
49.4.2	Priority Placement Housing Applications	Destroy 2 years after the date of application	Retain in work unit until destroyed	Student Housing
49.4.3	Priority Placement Housing Database (*student name, student number, contact details, housing references, requests for services, arrival dates)*	Database is copied & burnt onto CD at end of each semester period. Destroy CD 1 year after the semester it relates to	Retain in work unit in a secure and accessible form until destroyed	Student Housing
49.4.4	Priority Placement Reports	Retain permanently	Transfer to Records Management Program when reference ceases	Student Housing
49.5	Property Files (electronic)	Delete when superseded	Retain in work unit in a secure and accessible form until deleted	Student Housing

Entry	Class/Activity	Disposal Action	Custody	Prime Source
49.0	**STUDENT HOUSING continued**			
49.6	**Student Housing Access Program (SHAP)**			
49.6.1	SHAP Applications / Tenant files (*student name, original application, assessment, letter of offer & other correspondence, signed confidentiality statement, notices of eviction, notices to vacate)*	Destroy 7 years after date of application	Retain in work unit until destroyed	Student Housing
49.6.2	SHAP Database (*student name, contact details, emergency contact details, payments, bond, file notes, children's details – name & date of birth- exit details, condition reports similar to real estate agents)*	Delete individual student data 7 years after last date	Retain in work unit in a secure and accessible form until deleted	Student Housing
49.6.3	SHAP Feedback Forms	Destroy 1 year after form generated	Retain in work unit until destroyed	Student Housing
49.6.4	SHAP Reports	Retain permanently	Transfer to Records Management Program when reference ceases	Student Housing

Entry	Class/Activity	Disposal Action	Custody	Prime Source
49.0	**STUDENT HOUSING continued**			
49.7	**Temporary House**			
49.7.1	Temporary House Program Database (*student name, contact details, circumstances of the individual, copies of licence agreements)*	Delete individual student data 7 years after last date	Retain in work unit in a secure and accessible form until deleted	Student Housing
49.7.2	Temporary House Program Records (*student name, contact details, circumstances of the individual, signed licence agreements, rent receipts, initial case notes)*	Destroy individual student data 7 years after last date	Retain in work unit until destroyed	Student Housing
49.7.3	Temporary House Program Feedback Forms	Destroy 1 year after form generated	Retain in work unit until destroyed	Student Housing
49.7.4	Temporary House Program Student Case Notes	Destroy 7 years after last date	Retain in work unit until destroyed	Student Housing
49.7.5	Temporary House Reports	Retain permanently	Transfer to Records Management Program when reference ceases	Student Housing

Entry	Class/Activity	Disposal Action	Custody	Prime Source
50.0	**TIMETABLING**			
50.1	Blackwood Booking Folders (*hardcopy folders which duplicate spreadsheet information*)	Destroy 1 year after hire of venue	Retain in work unit until destroyed	Timetabling & Conference Management
50.2	Blackwood Spreadsheet (*used for University staff booking of Blackwood House – a University rural property: contact name, dates, times, duration, numbers of people, costs involved*)	Delete data 1 year after hire of venue	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
50.3	Conference Management SUMMIT Database (*conferences organized by UM*: *addresses, attendees details, delegate details, financial details*)	Delete data 2 years after conference finalized, except when a recurrent conference – then – Delete when superseded	Retain in work unit in a secure and accessible form until deleted	SUMMIT Database
50.4	Timetabling changes *(usually emails)*	Delete or destroy 1 year after date of class the email is referring to.	Retain in work unit until deleted or destroyed	Timetabling & Conference Management
50.5	University Timetable Database (*subject code, teaching rooms, staff information)*	Retain permanently Tranfer to CD every 5 years, then copy original CD every 5 years thereafter to ensure accessibility	Retain in work unit in a secure and accessible form	Timetabling & Conference Management

Entry	Class/Activity	Disposal Action	Custody	Prime Source
50.0	**TIMETABLING continued**			
50.6	Utilization Rates of Theatres Statistical Report	Retain permanently both the hardcopy & electronic version	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
50.7	Venue Hire Folders (*hardcopy details relating to each booking, also manages overtime for Building Supervisors associated with venue bookings*)	Destroy 1 year after hiring of venue	Retain in work unit until destroyed	Timetabling & Conference Management
50.8	Venue Hire Spreadsheet (*used for accounts*)	Delete data 1 year after hiring of venue	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
50.9	Venue Hiring Database (*caters for both internal & external bookings: rooms detail, meeting contact details, time & duration of meeting)*	Delete data 1 year after hiring of venue	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
51.0	**TRANSITION**			
	The transition program works in conjunction with Faculties to implement programs which assist students to adjust to University life. (From Academic Services' website)			

Entry	Class/Activity	Disposal Action	Custody	Prime Source
51.0	**TRANSITION continued**			
51.1	Cancellation/Leave of Absence Survey Report	Retain permanently	Transfer to Records Management Program when reference ceases	Transition Program
51.2	Cancellation/Leave of Absence Survey Spreadsheet	Send electronic copy to Faculty of Architecture, then delete	Retain in work unit in a secure and accessible form until deleted	Transition Program
51.3	***Committees Database see COMMITTEES***			
51.4	Degrees of Freedom Video	Retain permanently	Send 2 samples to University Library of each version	University Library
51.5	Events Records	Destroy when superseded	Retain in work unit until destroyed	Transition Program
51.6	Faculty Program Files	Destroy when superseded	Retain in work unit until destroyed	Transition Program
51.7	School Presentations • Hardcopy • Electronic	Destroy & Delete when superseded	Retain in work unit in a secure and accessible form until destroyed or deleted	Transition Program

Entry	Class/Activity	Disposal Action	Custody	Prime Source
51.0	**TRANSITION continued**			
51.8	Transition Initiative Evaluation Processes Database	Retain permanently	Retain in work unit in a secure and accessible form	Transition Program
51.9	Transition Initiatives Evaluation Processes Report *(Evaluation: How do we measure success?* *Report sent to the Academic Board)*	Destroy when reference ceases provided that a copy has been sent to the Academic Board	Retain in work unit until destroyed	Minutes Office
51.10	Transition Program Presentations Database	Delete data 3 years after date of presentation	Retain in work unit in a secure and accessible form until deleted	Transition Program
51.11	Transitions Program Presentations Annual Report	Retain permanently	Transfer to Records Management Program when reference ceases	Transition Program
51.12	Uni for a Day Database	Delete data 2 years after date of program	Retain in work unit in a secure and accessible form until deleted	Transition Program
51.13	Uni for a Day Report	Retain permanently	Send to Student Support Committee	Student Support Committee

Entry	Class/Activity	Disposal Action	Custody	Prime Source
52.0	**TRANSPORT AND TRAVEL**			
	This section does not cover records created and maintained by Property & Buildings (P&B)			
52.1	Departmental copies of parking arrangements for visitors	Destroy when reference ceases	Retain in work unit until destroyed	Property & Buildings
52.2	Parking Charge Reports	Destroy when administrative use ceases	Retain in work unit until destroyed	Property & Buildings
52.3	Records relating to Fully Funded Staff Travel	Departments must retrieve travel diaries and receipts from staff and retain those documents for a period of five years in the case of travel undertaken after 1 Apr 1995	Retain in work unit until destroyed	Work Unit
52.4	Records relating to Partially Funded Staff Travel	Staff whose travel is partially funded must: • keep their own receipts for a period of five years; • keep their own travel diary for a period of five years (if the period of travel exceeds five days); • have the University's payment to cover their travel expenses recorded on their Group Certificate; • substantiate their tax claims if asked to do so by the ATO	Individual staff member to retain records until destroyed. Work Unit's Authorizing travel allowances or reimbursements for partially funded travel must not keep the individual's travel diary	Individual Staff Member

Entry	Class/Activity	Disposal Action	Custody	Prime Source
52.0	**TRANSPORT AND TRAVEL continued**			
52.5	Vehicle Log Books	Return completed log books or those from vehicles which have been traded, or those which have run into multiple books to Property Services	Retain in work unit until completed	Property Services
53.0	**VENUE & CONFERENCE MANAGEMENT (see also CONFERENCES & SEMINARS; also FUNCTIONS)**			
	For general records relating to functions where Timetabling & Conference Management or the Protocol Office is NOT involved see FUNCTIONS			
53.1	Blackwood Information Folders	Destroy 1 year after hire of venue	Retain in work unit until destroyed	Timetabling & Conference Management
53.2	Blackwood Spreadsheet	Delete 1 year after hire of venue	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
53.3	SUMMIT Database - Conference Management	Delete 2 years after conference finalised, except with recurrent conferences which should be deleted when superseded	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management

Entry	Class/Activity	Disposal Action	Custody	Prime Source
53.0	**VENUE & CONFERENCE MANAGEMENT continued**			
53.4	Venue Hire Folders	Destroy 1 year after hire of venue	Retain in work unit until destroyed	Timetabling & Conference Management
53.5	Venue Hire Spreadsheet	Delete 1 year after hire of venue	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
53.6	Venue Hiring Database	Delete 1 year after hire of venue	Retain in work unit in a secure and accessible form until deleted	Timetabling & Conference Management
54.0	**VISITS & VISITORS (see also TRANSPORT & TRAVEL for parking arrangements)**			
54.1	Records relating to routine visit requests, proposals, arrangements, itineraries, visit or visitor briefs.	Destroy 2 years after visit conducted	Retain in work unit until destroyed	Work Unit

Entry	Class/Activity	Disposal Action	Custody	Prime Source
55.0	**WEBSITE CO-ORDINATION**			
	This Keyword relates to the maintenance and co-ordination of the Division's websites. Activities include the creation of templates, training and newsletters.			
55.1	VSC Databases *(contains staff details & student details of those who edit & contribute to the Virtual Service Centre)*	Delete information 1 year after staff & students become inactive as editors & contributors	Retain in work unit in a secure and accessible form until deleted	Interactive Services
55.2	Web item articles (*includes FAQ, answers, locations, links to on-line resources and diary events)*	Delete information when superseded	Retain in work unit in a secure and accessible form until deleted	Interactive Services
55.3	It is anticipated that all University departments /areas will have a web presence of some description. The University is currently developing a Web Archiving policy, however in the meantime the Records Management Program advises the following in regards to the long term maintenance of web records: 1. If the contents of the page contain long term recordkeeping value ***(check for the type of record under the relevant disposal class)*** and do not exist in any other format (e.g. paper, word document, etc) then it may be advisable to print the document/record and store with other paper records. 2. Logs (either in paper format or in an excel spreadsheet or word document) should be maintained which document when changes have been made to various pages within the site. Ideally, all major changes should be authorised and signed off by a Manager to ensure the authenticity of the material being presented on the website. 3. When the site is undergoing a major upgrade, (ie a brand new site is built to replace the current one) – the Records Management Program should be notified. Alternatively, a copy of the entire site can be put on CD.			