

State Records Office of Western Australia

**General Disposal Authority
for
Administrative Records**

RD 2003016

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GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

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INTRODUCTION

1. Background

The *State Records Act 2000* provides for the keeping of State records and for related purposes.

Under the Act, the State Records Commission of Western Australia is responsible for establishing principles and standards for recordkeeping across government and for approving Recordkeeping Plans. The State Records Office of Western Australia is, amongst other things, to advise government organizations on recordkeeping and on the preparation and compliance with Recordkeeping Plans.

This General Disposal Authority for Administrative Records (the Authority) is one of several General Disposal Authorities (GDAs) developed for State organizations by the State Records Office. GDAs are continuing authorities for the disposal of records documenting a State organization's routine internal operations. They cover records common to most State organizations, thereby providing consistent disposal decisions throughout the State Government and eliminating the necessity for each organization to prepare an authority for those records.

This Authority (RD 2003016), having been approved by the State Records Commission on the recommendation of the State Records Advisory Committee, is the official and continuing authority for the disposal of administrative records common to most State organizations.

Acknowledgements

The State Records Commission and the State Records Office would like to extend their appreciation and thanks to members of the State Records Commission Consultative Group, State Records Advisory Committee, Records and Information Management Liaison Group and organization representatives for their valuable comments and contributions to the formulation of this Authority.

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2. Legislative, Regulatory and Policy Requirements

2.1 Retention and Disposal of Records

State organizations create, receive and maintain a variety of administrative records to fulfil statutory, business and accountability requirements.

The retention and disposal of these records falls primarily under the provisions of the *State Records Act 2000*. The *Criminal Code Act 1913* and the *Public Sector Management Act 1994* also refer to the disposal of such records.

Under the *State Records Act 2000*, every State organization must have a Recordkeeping Plan (RKP) approved by the State Records Commission (SRC). The organization and its employees must comply with the RKP.

A Retention and Disposal Schedule (R&D) is the retention and disposal component of an RKP. It must set out which of the organization's State records are State archives and the retention periods for records that are not State archives. State organizations must retain their non-archival State records for the designated minimum retention period before they may be destroyed.

In accordance with SRC *Standard 3 – Appraisal of Records*, organizations are to retain and dispose of records covered by the General Disposal Authorities in accordance with those Authorities. Therefore, disposal of "administrative" State records in accordance with this Authority conforms to this requirement.

An organization's R&D is to cover all other records of the organization not covered by the GDAs. The R&D may include reference to the GDAs where applicable.

2.2 Electronic Transactions and Electronic Records

The *Electronic Transactions Act 2003* is an Act to facilitate electronic transactions, and for other purposes. The Act provides for the validity of transactions that have taken place wholly or partly by electronic communication. That is, if there is a legal requirement to give information in writing, provide a signature, produce a document, or record information, then on fulfilling certain provisions of the Act, those requirements would be taken to have been met if using electronic communications or electronic forms of documents.

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An electronic record is any record communicated and maintained by means of electronic equipment along with associated metadata (e.g. directory trees, indices, and software information such as executable files relating to the software and data files necessary in order to run the software program) to give meaning to the record.

Electronic records must be appraised in the same way as paper-based records. Electronic records are subject to the provisions of this Authority in the same way as paper files, cards and microforms.

Depending on the organization's information technology framework, information held in electronic form may be kept on-line in the current database form, in an electronic document management system, or on backup media such as magnetic tapes or disks. If there is no facility in place (such as an electronic document management system) to manage information held in electronic form, then electronic records are to be managed as hard copy records (i.e. printed out as necessary) and attached to file.

With the fragility of the media (magnetic tape, disks, optical disks etc) on which electronic records are stored, and the frequent introduction of new hardware and software, special care must be taken to ensure the preservation of the electronic records for as long as they are required. Organizations are responsible for ensuring that electronic records are accessible for as long as they are required and for managing the migration process to new hardware and software platforms whenever these are upgraded. If electronic records have archival value, individual organizations are responsible for maintaining these records so that they will be accessible for all time.

For further information please see the State Records Office's Policies and Standards Manual, in particular, *Public Records Policy 8: Policy for the ongoing management of electronic records designated as having archival value*.

Databases

Many State organizations will create and manage databases for functional or administrative purposes. Generally such databases, particularly those employed for administrative purposes, will be maintained with the intention of holding current data, with historical data being amended, overwritten or deleted.

If there is a business or evidential requirement for historical data to be retained within databases maintained for administrative purposes, then this data must be retained for as long as it is required in accordance with this Authority. The data may either be retained in the database, or (if required for reasons of system or storage efficiency) in an alternative format, such as hard copy, magnetic storage, optical storage etc.

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State organizations are to ensure that processes are in place (as should be reflected in agency policies and procedures) to ensure data integrity and to regulate the retention and disposal of data in databases in accordance with the subject or transaction to which the data relates.

Databases created and managed for core business or functional activities are to be included in the appropriate sections in the organization's functional Retention and Disposal Schedule.

Web Sites

Many State organizations create and maintain a web site, which can contain informational and/or transactional web pages. Organizations are to identify the components of web sites and ensure that processes are in place to capture and maintain relevant records and associated metadata for as long as they are required, as well as providing adequate audit trails.

Various methods may be employed in capturing and preserving web-based resources and records of web-based activity. These include:

- "snapshot" pictures taken at regular intervals;
- copying the web site with each significant change;
- keeping copies of web pages that are new or have been changed; and
- maintaining a log of changes to the web site.

For information about the management of Web information, please refer to the guidelines produced by the former Department of Industry and Technology, *Guidelines for State Government Web Sites* and *Guidelines for the Management of Web Information*. The *Guidelines for the Management of Web Information* were developed to assist government organizations address some of the practical issues associated with managing web based information that have arisen as a result of the *State Records Act 2000* and can be accessed at

<http://www.indtech.wa.gov.au/govt/polguides/websites/index.htm>

2.3 Evidence

Amendments to the *Evidence Act 1906* contained in Part 2 of the *Acts Amendment (Evidence) Act 2000* commenced on 3 January 2001. Section 73A of the *Evidence Act 1906* modifies the best evidence rule regarding the admissibility in a court of reproductions of documents.

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Section 73A(1) states that

“A document that accurately reproduces the contents of another document is admissible in evidence before a court in the same circumstances, and for the same purposes, as that other document, whether or not that other document exists.”

In determining whether a particular document accurately reproduces the contents of another, a court is not bound by the rules of evidence and may employ measures provided in Sections 73A(2)(a)–(d) of the *Evidence Act*.

It is an organization’s responsibility in terms of its risk management analysis to decide whether to create, retain and rely on a reproduction, in whatever format, of an original record. Organizations which employ imaging or microform technologies to create and manage reproductions of original records and subsequently wish to destroy the originals before the end of the designated minimum retention period as stated in this Authority, will need to obtain approval from the State Records Commission, via the State Records Advisory Committee and the State Records Office.

2.4 Freedom of Information

The *Freedom of Information Act 1992* prescribes rights and procedures for access to documents held by Government organizations. If a request for access under the Act has been lodged, all records relevant to the request must be identified and preserved until action on the request and on any subsequent reviews by the Information Commissioner or the Supreme Court are completed. This applies regardless of whether the records in question are due for destruction.

FOI requests that are State archives must contain copies of the records that were the subject of the requests.

2.5 Investigations and Inquiries

If an Investigation or Inquiry is in progress, all records relevant to the Investigation or Inquiry must be identified and preserved until the action and subsequent actions are completed.

2.6 Records relating to Aboriginal people

Premier’s Circular No. 2003/02 requires that

“records relating to Indigenous individuals, families or communities which concern any children, Indigenous or otherwise, removed from their families for any reason, whether held by government or

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non-government agencies, be brought to the attention of the Family Information Records Bureau (FIRB) and reflected in agency Recordkeeping Plans.”

Records that fall within the scope of this policy are to be brought to the attention of the FIRB for advice on their significance.

Where FIRB advice on the significance of records is consistent with the provisions in the GDAs or with the organization’s approved Retention and Disposal Schedule, the records may be retained and disposed of in accordance with those Authorities.

Where FIRB advice on the significance of records is inconsistent with the provisions in the GDAs or the organization’s Retention and Disposal Schedule, the organization must consult the State Records Office of WA for advice.

2.7 Legal Deposit of Western Australian Government Publications

Premier’s Circular No. 8/01 requires that

“Copies of all publications produced by public sector agencies and statutory authorities are to be deposited with the State Library of Western Australia (previously the Library and Information Service of Western Australia) and the National Library of Australia.”

Four (4) copies should be sent to the State Library and one (1) copy sent to the National Library.

3 Amalgamations of State Organizations

In the event of two or more State organizations being amalgamated, it is vital that the organizations’ records be maintained as evidence of their existence and accountable practices. To enable ease of access as well as maintain the integrity of the records, records of the subsumed organization or organizations (where the organization has been completely subsumed) should be transferred into the custody of the new agency. This older series of records must be retained so that no alterations can be made, and should be retained as distinct from the records that document the current ongoing activities of the new agency.

Please refer to *Public Records Policy 6: Records management standards for public records in the amalgamation of agencies* for further information.

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USE OF THE AUTHORITY

4 Scope of the Authority

This Authority applies to administrative records in all formats that are created or received by Western Australian State government organizations. Records that document core agency functions should be sentenced according to an organization's functional Retention and Disposal Schedule.

4.1 Use of the Authority in Functional Retention and Disposal Schedules

The Common Activities section in this Authority describes a wide range of records categories, which may be applied to various keywords within the Authority. Reference to these Common Activities may be made in an organization's functional Retention and Disposal (R&D) Schedule, where it is considered that these activities apply to specific functions.

NB: Only records categories in the Common Activities section of this Authority may be referenced in functional R&D Schedules.

Records relating to the functional or core business activities of State organizations are to be included in the organization's individual R&D Schedule.

However, some of the criteria and decisions in this Authority may be extrapolated for use in the organization's functional R&D Schedule as appropriate. For example:

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Records category in this Authority:

Description of Records	Disposal Action	Recommended Custody
Maintenance and repair of equipment	Destroy	7 years after last action

Records category in an organization's functional R&D Schedule:

Description of Records	Disposal Action	Recommended Custody
Maintenance and repair of specialized equipment	Destroy	7 years after last action

NB: The same disposal action and retention period have been used.

4.2 Amendments to the Authority

This Authority is a dynamic document. The editors understand and appreciate that issues may arise when the Authority is applied and welcome constructive criticism and comment from users. Where there is general agreement that changes should be made to the Authority, these will be submitted to the State Records Commission, via the State Records Advisory Committee, as amendments and after approval, will be distributed to all State organizations.

4.3 Overlap with other General Disposal Authorities (GDAs)

There are two other GDAs produced by the State Records Office that are relevant to State organizations:

- The General Disposal Authority for Human Resource Management Records (GDAHRM), and
- The General Disposal Authority for Financial and Accounting Records (GDAFA).

The scope of these GDAs may overlap in certain areas where records might be of a financial/accounting or human resources management nature as well as an administrative nature.

Throughout the body of this Authority, certain classes of records are denoted by "Refer to GDAHRM" or "Refer to GDAFA" references where appropriate, indicating that the records series should be disposed of in accordance with another GDA.

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Please note that references made to the State Records Office's *General Disposal Authority for Financial and Accounting Records* (GDAFA) relate to a forthcoming revised edition of the GDAFA, which is currently under development.

4.4 Replacement of Existing Disposal Coverage

The retention and disposal decisions in this Authority prevail over all decisions for the same types of administrative records covered in previously approved individual agency Retention and Disposal Schedules (R&D). However, please note the following:

- Where the retention period in this Authority is longer than that in the organization's R&D, this Authority prevails;
- Where the retention period in this Authority is shorter than that in the organization's R&D, the organization may choose to retain the record for the longer period;
- Where this Authority's disposal action is A (Archive) and the organization's R&D disposal action is D (Destroy), this Authority prevails. Records already sentenced for destruction must be re-sentenced; and
- Where this Authority's disposal action is D (Destroy) and the organization's R&D disposal action is A (Archive), the organization is to consult the State Records Office.

4.5 Administrative Records Not Covered by this Authority

Where a State organization holds individual series or types of records not covered by this Authority, the organization must make a separate submission to the State Records Commission, in consultation with the State Records Office for the legal disposal of those records.

5 Arrangement of the Authority

The general structure of the Authority is based on the arrangement of *Keyword AAA: a thesaurus of general terms (1998)*, produced by the State Records Authority of New South Wales. However, it is designed to apply to all organizations whether or not they have implemented Keyword AAA.

The Schedule has been divided into 4 parts:

Part A covers Ephemeral records.

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Part B covers Common Formats of records (Diaries and Calendars, Photographs and Audiovisual Records, and Databases).

Part C covers Common Activity Descriptors, or subcategories, which may be applied to various keywords. The aim of this section is to reduce unnecessary duplication.

Part D covers each of the ten Administrative functions:

- Community Relations
- Equipment & Stores
- Fleet Management
- Government Relations
- Information Management
- Legal Services
- Property Management
- Publication
- Strategic Management
- Technology and Telecommunications

Each Administrative function has been divided using terms (activity descriptors) from the second tier of the hierarchical structure used in Keyword AAA. Where necessary, activities have been further sub-divided into classes or sub-categories of records, usually because different retention periods or disposal actions apply.

While some organizations may have different record/file titling conventions, the functions and activity descriptors cover the broad spectrum of administrative records found in State organizations.

If administrative activities as described in this Authority are an essential element of an organization's core business, they must be included in the organization's functional R&D.

6. Significant Records

Sometimes, the terms "significant" or "major" or "unique" (or similar) are used in the description of record categories, usually to separate State archives from records that may be destroyed.

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For example, “Significant Advice” is considered to be advice that:

- Affects the whole-of-government or portfolio function, or
- Concerns or affects Corporate Executive activity, or
- Concerns major liabilities or obligations of the organization and/or the State, or
- Relates to the development of legislation, regulations, or policy, or
- Relates to controversial matters, or
- Has wide community interest, or
- Otherwise (significantly) impacts or affects the organization’s functions or structure
e.g. proposed changes to organizational functions.

These records on “Significant Advice” are archival records, whereas “Other Advice” may be destroyed 2 years after date of last action.

The same criteria used for determining significant advice may be used to determine the significance of other functions and activities.

The value of records may change over time. In assessing records that have reached their minimum retention period and are due for destruction, officers should consider those that may have potential business or historical value, for possible further retention or archiving. Records that appear to be of interest as archival records should be referred to the State Records Office for review and evaluation.

State records described in this Authority created before 1920 should be referred to the State Records Office for further appraisal before any disposal action. State records should be appraised for their ongoing value in accordance with SRC Standard 3 - Appraisal of records.

7. Policies and Procedures

Records of policies developed by the organization are to be retained permanently as archives. It is essential that all records relating to internal policy, including the background to their development, are separate and identifiable from other

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administrative and functional records. This will ensure such records are discrete and available for archival retention, not interwoven with operational issues, which in most cases are of short-term value.

Some internally created procedures are considered to be State archives, others are considered to be temporary records.

8. Duplicates or Copies of State Records

Duplicates or copies of records are defined as exact copies of original records, that is, where no annotations have been made and where the original record forms part of the organization's recordkeeping system. Such records may be destroyed once the originals have been captured into the recordkeeping system and when they are no longer needed for reference purposes. (See also Part A for the retention and disposal of ephemeral records.)

9. Photographs and Audiovisual Records

Audiovisual records (including photographs, videotapes, films, and audio tapes) are to be treated in the same manner as any other record format, and are to be sentenced in accordance with the subject matter to which they relate.

The content of audiovisual material **must** be identifiable. For example, people, places, events and dates depicted in photographs must be identified as far as possible.

The sentencing of audiovisual records must be considered in relation to:

- Their subject matter; and
- Documentary material that relates to their creation and use.

A photograph, cassette tape or other audiovisual record should be viewed as part of a larger set of records, that is, those records that document why it was taken and how it was used. Disposition of audiovisual material must be consistent with these records.

Organizations should note that correct handling and care of audiovisual materials is necessary to preserve them for as long as they are required. Organizations may contact the State Records Office for advice on protecting and handling the various formats.

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RETENTION AND DISPOSAL OF STATE RECORDS

10. Disposal of State Records

Case by case authorisation by the State Records Office for destruction of State records, of an administrative nature, in accordance with this Authority is not necessary.

The Authority sets the **minimum** periods for the retention of administrative records. Organizations must not destroy or otherwise dispose of State records earlier than indicated in the Authority without prior approval of the State Records Commission.

Final disposition of a State record may take one of three forms:

Archive (denoted A) – is a record or record series identified as having archival value that is to be retained permanently.

Please note that:

- Organizations are required to transfer their archival records to the State archives collection (the State Records Office) when those archives become 25 years old. However, they may be transferred before this time.
- Only hard copy archives may be transferred to the State archives collection.
- Electronic archives must be retained by the organization in accordance with *Public Records Policy: 8 – Policy for the ongoing management of electronic records designated as having archival value*.
- Organizations, on condition of State Records Commission approval, may retain custody of archives beyond 25 years. See *SRC Standard 5 – Compulsory Transfer of Archives*.
- Organizations are to identify those archives that will be restricted access archives and the ages at which they will cease to be restricted access archives. See *SRC Standard 4 – Restricted Access Archives*.

Destroy (denoted D) – is a record or record series identified as having temporary value and which may be destroyed by a recommended method at the end of the minimum retention period. Please see section 14 in this Introduction for recommended methods of destruction.

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Secondary storage may be used for temporary records requiring long-term storage prior to destruction. Microfilming or transfer to optical media may also be considered. It is the organization's responsibility to ensure that the information on these records is accessible for as long as it is required.

Retain for life of organization (denoted R) – is a record or record series identified as **not** having archival value, but has ongoing value to the organization and which are to be retained for the life of the organization.

In the event of the organization being privatised, abolished or amalgamated, consult the State Records Office for advice on the management of such records.

11. Retaining State Records for Longer Periods

State organizations may wish to retain records longer than the stated minimum retention periods set out in this Authority, either for administrative convenience or to provide a particular service to their clientele.

Sections 32(1) and 32(2) of the *State Records Act 2000* state that government organizations must transfer their archives to the State Archives collection before the archives become 25 years old, unless otherwise specified in their Recordkeeping Plan. Organizations must inform the State Records Office of their intention to retain custody of archival records for longer than the period stated in this Authority.

Temporary records may be retained for longer periods without reference to the State Records Office. We suggest that if such decisions are taken, the organization documents the reasons why the increased retention periods were adopted.

12. Files Containing State Records with Differing Retention Periods or with Mixed Dispositions

Where files contain State records with differing retention periods, the complete file must be retained for the longest retention period stated in this Authority in order to comply with statutory requirements.

Where files contain both temporary and some archival value State records, the complete file must be archived.

NB: In both cases, individual pages/documents must NOT be culled (removed) from files.

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13. Responsibility for Destruction of State Records

It is the responsibility of the principal officer of a State organization to ensure that State records are not destroyed except in accordance with this Authority or other disposal authorities approved by the State Records Commission.

Officers undertaking disposal are to refer lists of records for archiving or destruction to the organization's CEO, Corporate Executive, or an authorised senior officer / manager for review and authorisation of transfer or destruction. Records should be periodically reviewed for potential historical interest and referral to the State Records Office.

14. Recommended Methods of Destruction of State Records

The destruction of State records must be done completely so that no information is retrievable.

Hard copy (paper) State records should be destroyed by shredding, pulping or trommelling. Burning or burying of State records are **not** acceptable methods of destruction.

Electronic records should be destroyed by reformatting, rewriting or degaussing. The use of the "delete" function in software packages is **not** sufficient to destroy electronic records, as data may still be recovered. However, organizations may make use of electronic file shredding software to ensure the complete destruction of electronic records.

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DEFINITIONS OF TERMS USED IN THE AUTHORITY

Disposal Action

The third column in the Authority, which specifies the disposition of the State record. The final disposition is assigned according to whether or not the record is of archival value.

The final disposition will be either Archive (A), Destroy (D), or Retain for life of organization (R):

- **A (Archive)** A record or record series that has been identified as having archival value.
- **D (Destroy)** A record or record series that has been identified as having temporary value.
- **R (Retain for life of organization)** A record or record series that has been identified as not having archival value, but has ongoing value for the life of the organization.

Functional Retention and Disposal Schedule

An organization-specific disposal authority addressing the disposal of records series that document the organization's core functions.

Last Action *see Recommended Custody*

Recommended Custody

The fourth column in the Authority, which specifies the retention period that records are to be retained and the action or trigger that begins the retention period.

Disposal triggers include "after last action", which refers to the last date that a matter was considered and noted on the record. This date is used to establish a date for closing the record and effecting the disposal action.

Other disposal triggers include after last entry, after superseded, and after expiry of contract.

Refer to GDAFA

For disposal of this particular class of records, refer to the General Disposal Authority for Financial and Accounting Records.

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Refer to GDAHRM

For disposal of this particular class of records, refer to the General Disposal Authority for Human Resource Management Records.

R&D Schedule

Retention and Disposal Schedule

Significant Record see Significant records in the Introduction, section 6.

State Record

Any record of information however recorded which has been created, received or kept by a State organization or a State organization employee in the course of the employee's work for the organization. Library materials are explicitly excluded from this coverage.

State Organization

A parliamentary department or a government organization, as described in the Schedules of the *State Records Act 2000*.

Superseded

A superseded record is one that is replaced by the production of a new version or amendment.

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

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GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
PART A	EPHEMERAL RECORDS		
1	<p>EPHEMERAL RECORDS Ephemeral records have no continuing value to the organization and generally are only needed for a few hours or a few days. They may not need to be placed within the official recordkeeping system (e.g. brochures, fliers not produced by the organization).</p>		
1.1	Duplicate (or extract) copies of records, documents, circulars, forms, etc. where no annotations have been made	D	When reference ceases
1.2	Information material produced by other organizations (e.g. price lists, catalogues, advertising material, brochures)	D	When reference ceases
1.3	Reference sets of manuals, directories, addresses and contact lists	D	When reference ceases
1.4	Unsolicited letters or promotional material offering goods or services to the organization	D	When reference ceases
1.5	<p>Messages including voice mail, e-mail, telephone messages, post-it or sticky notes when the message does not relate to the business functions of the organization</p> <p>NB: Messages which do relate to the business functions of the organization must be transcribed or printed, and placed on the appropriate subject file. Once the message has been attached to file, the original message may be destroyed.</p>	D	When reference ceases
1.6	Rough drafts of reports, or correspondence, routine or rough calculations	D	When reference ceases

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>not circulated to other staff for comment / input, and of which a final draft has been produced and placed on the appropriate subject file</p> <p>NB: Versions of drafts which contain significant changes to content must be placed on the appropriate subject file, e.g. internal policy.</p>		
1.7	<p>Transitory messages giving minor instructions and of a routine instructional nature that are used to further some activity in either a paper-based or electronic format (e.g. corrections, requesting file creation or retrieval, filing a letter, formatting documents)</p>	D	When reference ceases
1.8	<p>Letters or cards of appreciation, sympathy or greetings with no enduring value</p>	D	When reference ceases
1.9	<p>Working papers, background notes and reference materials used to prepare or complete other documents (where these documents have been placed on the appropriate subject file)</p> <p>NB: Working papers and background notes relating to the development of internal policy or high level strategic issues must be placed on the appropriate subject file. See also COMMON ACTIVITIES – Policy, section 5.7.1.</p> <p>Organizations must be mindful of the content of working papers and retain them as part of a subject file if deemed necessary.</p>	D	When reference ceases
1.10	<p>Computer records (e.g. test data, data input forms)</p> <p>See <i>TECHNOLOGY AND TELECOMMUNICATIONS</i> for computer logs.</p>	D	When reference ceases

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
1.11	Fax transmission reports	D	When reference ceases
PART B	COMMON FORMATS This section refers to certain formats of records that are frequently maintained in organizations: diaries, calendars, photographs and audiovisual records, and databases.		
2	DIARIES AND CALENDARS Refers to both hard copy and electronic diary systems.		
2.1	Diaries / appointment books – of CEOs and Senior Executives, recording detailed information regarding significant matters that are not recorded elsewhere	A	5 years after last action
2.2	Diaries / appointment books – of CEOs and Senior Executives, recording detailed information regarding significant matters that are recorded elsewhere	D	5 year after last action
2.3	Diaries / appointment books – used by authorised officers of the organization who deal with the public (e.g. counsellors) recording detailed information which is not held elsewhere	D	3 years after last action
2.4	Diaries / appointment books – used by other officers to record basic information e.g. dates and times of meetings and appointments	D	1 year after last action
2.5	Calendars (including desk calendars)	D	When reference ceases
3	PHOTOGRAPHS AND AUDIOVISUAL RECORDS Photographs and audiovisual records that are records of business activity		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>must be maintained and sentenced according to their subject matter, by using either the General Disposal Authorities or the organization's approved Retention and Disposal Schedule.</p> <p>Refer to section 9 in the Introduction for instructions on maintaining photographs and audiovisual records as State records.</p>		
4	<p>DATABASES</p> <p>Many State organizations will create and manage databases for functional or administrative purposes. Databases that contain information relating to functional or administrative activities must be maintained and sentenced according to their subject matter, by using either the General Disposal Authorities or the organization's approved Retention and Disposal Schedule.</p> <p>Refer to section 2.2 in the Introduction for instructions on maintaining databases as State records.</p>		
PART C	COMMON ACTIVITIES		
5	<p><u>COMMON ACTIVITIES</u></p> <p>These activities may be used in conjunction with keywords as appropriate.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
5.1	<p>ADVICE Records relating to the receipt or provision of advice to, or by, the organization.</p> <p>See <i>LEGAL SERVICES – Advice</i> for records relating to legal advice.</p> <p>NB: Where the provision of advice is an essential element of the core business activity of the organization, Advice should be included in the organization’s functional Retention and Disposal Schedule, or reference be made in it to this section if applicable.</p>		
5.1.1	<p>Significant advice – <i>i.e.</i> that which:</p> <p>affects the whole-of-government or portfolio function, or concerns or affects Corporate Executive activity, or concerns major liabilities or obligations of the organization and/or the State, or relates to the development of legislation, regulations, or policy, or relates to controversial matters or wide community interest, or otherwise (significantly) impacts or affects the organization’s functions or structure <i>e.g.</i> proposed changes to organizational functions</p>	A	5 years after last action
5.1.2	<p>Other advice – concerning routine operational or administrative matters</p>	D	2 years after last action
5.2	<p>AGREEMENTS / CONTRACTING-OUT / JOINT VENTURES The establishment and management of ALL binding arrangements including:</p> <ul style="list-style-type: none"> • agreements (including service agreements), • contracts under seal, deed or special contracts, 		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<ul style="list-style-type: none"> • joint ventures, and • Memoranda of Understanding (MOUs) <p>established for any purpose, including:</p> <ul style="list-style-type: none"> • the provision of services by external contractors / consultants, • the use of internal or external bureau services, and • the performance of Government projects, programs and services by outsourced agents. <p>See <i>COMMON ACTIVITIES – Tendering</i> for records relating to tenders and the tendering process.</p> <p>Refer to the <i>General Disposal Authority for Human Resource Management Records</i> for employment contracts.</p>		
5.2.1	<p>Significant Agreements / Contracts /Joint Ventures</p> <p>All records relating to the establishment, ongoing management, and finalisation of significant contracts, agreements and joint ventures. Includes entries and records in a Contracts Register.</p> <p>Significant is defined as a contract, agreement or joint venture that:</p> <ul style="list-style-type: none"> • affects the whole-of-government function, or • affects the transfer of organization or Government responsibilities, or is associated with the privatisation of Government functions, or involves Public Private Partnerships, or involves inter-governmental relations, or • is to do with large-scale government infrastructure projects, or • required Ministerial approval, or • has implications for major liabilities or obligations of the organization and / or the State, or 	A	5 years after expiry of contract

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<ul style="list-style-type: none"> • sets a contractual precedent for the organization and / or the State, or • was established under controversial circumstances or is concerned with controversial matters, or • otherwise (significantly) impacts on or changes the organization's functions 		
5.2.2	<p>Agreements / Contracts / Joint Ventures Under Seal or Deed All records relating to the establishment, management, and finalisation of contracts, agreements and joint ventures, under seal. Includes entries and records in a Contracts Register</p>	D	21 years after expiry of contract, and at end of defects liability period, if applicable
5.2.3	<p>Other Agreements / Contracts / Joint Ventures Records relating to the establishment, management, and finalization of all other contracts, agreements and joint ventures. Includes entries and records in a Contracts Register</p>	D	7 years after expiry of contract
5.2.4	Contracts Register – where created separately to the contract		Retain in accordance with 5.2.1, 5.2.2 or 5.2.3 as applicable
5.3	<p>COMMITTEES All records relating to “committees”, established for functional or administrative purposes, and includes:</p> <ul style="list-style-type: none"> • Boards of management; • Advisory and Approval Committees, or similar; established by a Board or Commission to perform a legislative function or for business requirements; • internal administrative committees of the organization; • external committees, <i>i.e.</i> committees external to the organization, attended by organization staff; and 		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<ul style="list-style-type: none"> working groups and task forces. 		
5.3.1	Establishment of committees – relating to strategic planning and policy, corporate executive, or core business functions (including appointment of members)	A	5 years after last action
5.3.2	Establishment of committees – relating to administrative activities, branch / unit level management, or non-core business activities (including appointment of members)	D	5 years after last action
5.3.3	Internal committees – relating to core business functions and activities <ul style="list-style-type: none"> agendas, minutes, reports and supporting papers 	A	5 years after last action
5.3.4	Internal committees – relating to strategic planning and policy or corporate executive <ul style="list-style-type: none"> agendas, minutes, reports and supporting papers 	A	5 years after last action
5.3.5	Internal committees – relating to administrative activities, branch/unit level management, or non-core business activities <ul style="list-style-type: none"> agendas, minutes, reports and supporting papers 	D	5 years after last action
5.3.6	External committees where the organization has a coordinating or secretariat role, relating to strategic planning and policy, corporate executive, or core business functions <ul style="list-style-type: none"> agendas, minutes, reports and supporting papers 	A	5 years after last action
5.3.7	External committees where the organization has significant input other than that in 5.3.6 <ul style="list-style-type: none"> agendas, minutes, reports and supporting papers 	A	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
5.3.8	<p>External committees – where the organization has a coordinating or secretariat role, relating to administrative activities, branch/unit level management, or non-core business activities</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	D	5 years after last action
5.3.9	<p>External committees – where the organization has no coordinating or secretariat role</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	D	5 years after last action
5.3.10	Arrangements (e.g. room bookings) and notices	D	1 year after last action
5.4	<p>COMPLIANCE Records relating to compliance with statutory, whole-of-government, or industry standards or requirements, including proof of compliance.</p> <p>See also <i>COMMON ACTIVITIES – Reporting</i>.</p>		
5.4.1	Breaches - serious breaches, serious failures or substantial investigations	A	5 years after last action
5.4.2	Breaches – minor	D	7 years after last action
5.4.3	Compliance – records documenting proof of compliance by organizations	D	7 years after last action
5.4.4	Compliance – financial or accounting		Refer to GDAFA
5.5	<p>MEETINGS Records relating to meetings of groups within the organization or involving organization personnel, pertaining to the management of sections,</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>departments or the organization as a whole.</p> <p>See <i>COMMON ACTIVITIES - COMMITTEES</i> for meetings of committees, working groups, etc.</p>		
5.5.1	<p>High-level internal meetings (relating to strategic planning and policy, corporate executive, and core business functions)</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	A	5 years after last action
5.5.2	<p>Other internal meetings (relating to administrative activities, branch / unit level management, and non-core business activities)</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	D	5 years after last action
5.5.3	<p>External meetings where the organization has a coordinating or secretariat role (relating to strategic planning and policy, corporate executive, and core business functions)</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	A	5 years after last action
5.5.4	<p>External meetings where the organization has a coordinating or secretariat role (relating to administrative activities, branch / unit level management, and non-core business activities)</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	D	7 years after last action
5.5.5	<p>External meetings where the organization has no coordinating or secretariat role</p> <ul style="list-style-type: none"> • agendas, minutes, reports and supporting papers 	D	1 year after last action
5.5.6	<p>Arrangements and notices (e.g. room bookings)</p>	D	1 year after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
5.6	<p>PLANNING</p> <p>See <i>PROPERTY MANAGEMENT – Planning</i> for planning and development activities relating to organization property.</p> <p>See <i>STRATEGIC MANAGEMENT – Planning</i> for the organization’s strategic, corporate, business, operational and administrative plans.</p>		
5.7	<p>POLICY</p> <p>The development and implementation of policies that affect the whole of the organization. Also includes organizational contributions to whole-of-government policies.</p> <p>See <i>COMMON ACTIVITIES – Compliance</i> for policy that an organization is obligated to adopt under legislative or regulatory requirements.</p>		
5.7.1	<p>Policies developed by the organization (internal) – drafts, working papers, final copies and implementation</p> <p>NB: This category refers to policies developed for internal use in the organization.</p>	A	5 years after last action
5.7.2	Whole-of-government policies – significant input from organization	A	5 years after last action
5.7.3	Whole-of-government policies – minor or no input from organization	D	3 years after last action
5.7.4	Internal circulars – master copies	A	5 years after last action
5.8	<p>PROCEDURES</p> <p>Procedures used by the organization, whether internal (produced by the</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	organization) or externally produced.		
5.8.1	Internal procedures (including drafts and working papers) – relating to the core business functions and activities of organization – master sets	A	5 years after superseded
5.8.2	Internal procedures – relating to Compensation, Establishment, Industrial Relations, Occupational Health and Safety, Personnel and Staff Development		Refer to GDAHRM
5.8.3	Internal procedures – relating to Financial Management		Refer to GDAFA
5.8.4	Internal procedures (including drafts and working papers) – relating to other administrative activities	D	7 years after superseded
5.8.5	Internal circulars – master copies		Retain in accordance with 5.7.1, 5.7.2, 5.7.3 or 5.7.4 as appropriate
5.8.6	Externally produced procedures (including whole-of-government procedures)	D	When reference ceases
5.9	<p>REPORTING</p> <p>Records relating to formal and/or informal reporting against day-to-day business activities or low-level operational activities. Includes statistical information and surveys.</p> <p>See <i>STRATEGIC MANAGEMENT – Reporting</i> for formal reporting against organization business, corporate, or strategic plans.</p> <p>See <i>GOVERNMENT RELATIONS – Reporting</i> for formal reporting against inter-organizational or inter-governmental plans.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	See <i>PUBLICATION</i> for records relating to the organization's annual report.		
5.9.1	Reporting – day-to-day administrative or operational activities	D	5 years after last action
5.9.2	STATISTICS Statistical information collected and collated by the organization.		
5.9.2.1	Returns (raw data)	D	2 years after last action
5.9.2.2	Consolidated statistics – forwarded to Australian Bureau of Statistics (ABS)	D	3 years after last action
5.9.2.3	Consolidated statistics – major business activities, not forwarded to ABS, incorporated into organization's annual report	D	5 years after last action
5.9.2.4	Consolidated statistics – major business activities, not forwarded to ABS, not incorporated into organization's annual report	A	5 years after last action
5.9.2.5	Statistical information – other statistics relating to organization activities	D	5 years after last action
5.9.2.6	Statistical information – from external organizations, retained for reference purposes	D	When reference ceases
5.9.3	SURVEYS Surveys developed or completed by the organization (includes returns collection, collation and analysis).		
5.9.3.1	Returns (raw data)	D	2 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
5.9.3.2	Surveys conducted by organization – not incorporated into annual report or other reports, or not proceeded with (including arrangements for collection, collation and analysis)	D	5 years after last action
5.9.3.3	Surveys conducted by organization – incorporated into annual report (including arrangements for collection, collation, and analysis)	D	5 years after last action
5.9.3.4	Surveys conducted by other organizations (information provided by organization)	D	2 years after last action
5.10	<p>RESEARCH See also <i>PUBLICATION – Drafting</i> for research incorporated into organizational publications.</p> <p>NB: Where organizations undertake research as part of core business, relevant records should be included in the organization’s functional Retention and Disposal Schedule.</p>		
5.10.1	Research – concerning strategic direction or organization-wide issues	A	5 years after last action
5.10.2	Research – concerning administrative issues	D	3 years after last action
5.10.3	Qualitative and quantitative data – used for research, not forming the basis for a publication	D	3 years after preparation of research
5.10.4	Routine research (e.g. library queries or literature searches)	D	1 year after last action
5.11	<p>TENDERING The process of assessing submissions with the goal of establishing a</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	contract. See also <i>COMMON ACTIVITIES – Agreements / Contracting-Out / Joint Ventures.</i>		
5.11.1	Tenders – successful applicants (government-wide projects, landmark structures, other projects of significant public interest)		Refer to GDAFA
5.11.2	Tenders – successful applicants (other)		Refer to GDAFA
5.11.3	Tenders – unsuccessful applications		Refer to GDAFA
5.11.4	Tender register		Refer to GDAFA
5.11.5	Tenders – advertising arrangements and copies of advertisements	D	2 years after last action
5.11.6	Tenders – enquiries	D	2 years after last action
5.11.7	Tenders – quotes offered		Refer to GDAFA

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
PART D	KEYWORDS These keywords relate to administrative functions.		
6	<u>COMMUNITY RELATIONS</u> Activities associated with establishing rapport with stakeholders and the broader community, and raising and maintaining the organization's public profile. Includes the management of customer services, relationships with professional bodies and industry, promotion, and media liaison. NB: Four copies of any published materials must be lodged with the J.S. Batty Library of West Australian History in accordance with Premier's Circular 8/01.		
6.1	ADDRESSES (PRESENTATIONS) Records related to addresses and speeches presented for training, professional, community relations or sales purposes. Includes multimedia presentations. See <i>PUBLICATIONS</i> for publication of addresses presented by organization personnel. See <i>GOVERNMENT RELATIONS – Representations – Ministerials</i> for addresses or speeches presented by Ministers.		
6.1.1	Addresses and speeches presented by Ministers or senior officers – master copies or transcripts	A	5 years after last action
6.1.2	Addresses presented by other officers	D	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
6.1.3	Addresses – preparatory and background material	D	2 years after last action
6.2	CELEBRATIONS, CEREMONIES, SOCIAL FUNCTIONS Celebrations, ceremonies and social functions relating to the organization or organization personnel. Includes awards or honours presented or received by the organization.		
6.2.1	Celebrations, ceremonies and functions – of State significance or commemorating a historical anniversary	A	5 years after last action
6.2.2	Celebrations, ceremonies and functions – that are unique, held for a special occasion, or to honour a particular event	A	5 years after last action
6.2.3	Celebrations, ceremonies and functions – other	D	5 years after last action
6.2.4	Awards / honours – nominations received or presented by the organization, or organization personnel (including supporting documentation)	D	3 years after last action
6.2.5	Awards / honours – recipients/winners of awards received or presented by the organization, or organization personnel	A	5 years after last action
6.2.6	Awards – industrial awards		Refer to GDAHRM
6.2.7	Administrative arrangements (e.g. catering)	D	1 year after last action
6.3	CONFERENCES, COURSES, SEMINARS Refers to conferences, courses or seminars arranged and presented by the organization.		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	Refer to the <i>General Disposal Authority for Human Resource Management Records</i> for organization staff attendance at conferences, courses or seminars.		
6.3.1	Conferences – planning and development	D	10 years after last action
6.3.2	Courses or seminars – planning and development	D	3 years after last action
6.3.3	Conferences, courses or seminars – published proceedings		Lodge 4 copies with J.S. Battye Library of West Australian History as per Premier's Circular 8/01
6.3.4	Conferences, courses or seminars – unpublished proceedings	A	5 years after last action
6.3.5	Administrative arrangements (e.g. bookings, catering)	D	1 year after last action
6.4	<p>CUSTOMER SERVICE The development and delivery of services for customers.</p> <p>See also <i>STRATEGIC MANAGEMENT – Customer Service</i> for the planning and evaluation of customer service practices.</p> <p>See <i>COMMUNITY RELATIONS - Enquiries</i> for requests for information.</p>		
6.4.1	Customer service practices and programs – development and implementation	D	5 years after last action
6.4.2	Customer service facilities (e.g. help desks, interpreters, outreach)	D	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	programs) – management		
6.5	<p>DONATIONS The donation of non-monetary items, including artefacts and property, to or from the organization. Refer to the <i>General Disposal Authority for Financial and Accounting Records</i> for monetary donations.</p> <p>NB: If donations play a significant role in the organization’s functional operations (e.g. Museum), related records should be sentenced in accordance with the organization’s functional Retention and Disposal Schedule.</p>		
6.5.1	Donations or bequests – made to organization, of long term value, of State significance, or of public interest	A	5 years after last action
6.5.2	Donations – made to organization, of little public interest	D	7 years after last action or disposal of donation
6.5.3	Donations – made by organization	D	7 years after donation made
6.5.4	Donations – refused (offered to, or applied for by organization)	D	3 years after last action
6.5.5	Donations – monetary (offered to, or applied for by organization)		Refer to GDAFA
6.6	<p>ENQUIRIES Requests for information from members of the public, about the organization and its services.</p> <p>See <i>INFORMATION MANAGEMENT – Enquiries</i> for enquiries that are serviced by the organization’s information resources.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>See <i>GOVERNMENT RELATIONS – Enquiries</i> for requests for information from other governments or government organizations.</p> <p>See <i>GOVERNMENT RELATIONS – Inquiries</i> for official requests for information, e.g. Royal Commissions.</p>		
6.6.1	Enquiries – detailed or significant information	D	5 years after last action
6.6.2	Enquiries – basic or routine information	D	2 years after last action
6.6.3	Enquiries – registers	D	5 years after last entry
6.7	<p>EXHIBITIONS The development of exhibitions and displays for educational, informational or promotional purposes.</p> <p>NB: If exhibitions play a significant role in the organization’s functional operations (e.g. Art Gallery), related records should be sentenced in accordance with the organization’s functional Retention and Disposal Schedule.</p>		
6.7.1	Exhibitions of State significance or which commemorate a historical anniversary – planning, development, content and design	A	5 years after last action
6.7.2	Other exhibitions – planning, development, content and design	D	3 years after last action
6.7.3	Administrative arrangements (e.g. catering)	D	2 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
6.8	GRANT FUNDING		Refer to GDAFA
6.9	GREETINGS Greetings (e.g. cards) sent by the organization. See also <i>EPHEMERAL RECORDS – section 1.8</i> for cards received that do not have enduring value.		
6.9.1	Greetings (e.g. Christmas cards, condolences) - preparation and sending (including address lists)	D	1 year after last action
6.9.2	Invitations – received by organization	D	1 year after last action
6.10	LIAISON Regular ongoing contact between the organization and external bodies. See also <i>GOVERNMENT RELATIONS – Representations</i> for community-based correspondence (e.g. petitions) requiring a response from a Member of Parliament.		
6.10.1	Liaison – between the organization and: <ul style="list-style-type: none"> • community groups, • professional and industry associations, and • private sector organizations 	D	5 years after last action
6.10.2	Professional and industry associations – memberships	D	5 years after last action
6.10.3	Professional or industry associations – participation in activities	D	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
6.10.4	Professional or industry associations – invitations to join, promotional material	D	When reference ceases
6.11	MARKETING Activities undertaken to promote and raise the profile of the organization. See also <i>PUBLICATIONS</i> for records relating to published materials, including promotional material produced by or for the organization.		
6.11.1	ADVERTISING Advertising in all media, for the purpose of promoting the organization and its activities. Refer to the <i>General Disposal Authority for Human Resource Management Records</i> for recruitment advertising. See <i>COMMON ACTIVITIES – Tendering</i> for advertising relating to tender advertising. See <i>INFORMATION MANAGEMENT – Copyright</i> for records relating to copyright. See <i>PUBLICATION – Corporate Style</i> for records relating to the presentation of corporate image (e.g. logos, letterheads)		
6.11.1.1	Advertising (all media) – preparation, allocation and placement	D	3 years after last action
6.11.1.2	Print advertisements – master copies	D	3 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
6.11.1.3	Print advertisements – recruitment		Refer to GDAHRM
6.11.1.4	Promotional films and videos – if published		Lodge four copies with J.S. Batty Library of West Australian History as per Premier’s Circular 8/01
6.11.1.5	Promotional films and videos – not published	D	7 years after last action
6.11.2	SPONSORSHIP Arrangements for sponsorships of the organization or its projects. See also <i>COMMON ACTIVITIES – Agreements / Contracting-Out / Joint Ventures</i> for binding arrangements.		
6.11.2.1	Sponsorship projects – administrative arrangements	D	7 years after last action
6.11.2.2	Sponsorship projects – financial records		Refer to GDAFA
6.12	MEDIA RELATIONS Includes media liaison, public comment, news articles and press releases relating to the organization.		
6.12.1	Media releases – where not lodged with Batty Library	A	5 years after last action
6.12.2	Press cuttings – about or concerning the organization and where held together on a separate file NB: If press cuttings form part of a subject file, dispose as for the subject in this GDA or organization-specific Retention and Disposal	A	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	Schedule.		
6.12.3	Media relations - arrangements (e.g. persons authorised to speak with the media, press cutting services)	D	3 years after last action
6.13	<p>PUBLIC REACTION Letters of complaint, appreciation, or suggestions received from members of the public.</p> <p>See <i>COMMUNITY RELATIONS - Enquiries</i> for requests for information.</p>		
6.13.1	Public reaction or suggestions – setting a precedent, raising legal issues or leading to a change in policy or procedures	A	5 years after last action
6.13.2	Public reaction or suggestions – requiring investigation or a specific response	D	7 years after last action
6.13.3	Public reaction or suggestions – requiring a routine response, requiring no response, or regarding an administrative matter	D	2 years after last action
6.14	<p>VISITS Visits to the organization by members of the public, students or other organizations, for public awareness, public relations, or educational programs. Also includes organization staff visits to other organizations on educational or promotional business.</p> <p>NB: For organizations where records of visits are kept for security reasons (e.g. Prisons), the records must be sentenced in accordance with the organization’s functional Retention and Disposal Schedule.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	See <i>GOVERNMENT RELATIONS – Visits</i> for “official” visits, <i>i.e.</i> where the visitor is a guest of the Government.		
6.14.1	Visits to organization – members of the public, government and non-government organizations, or casual groups <i>e.g.</i> schools	D	7 years after last action
6.14.2	Visits to the organization – requests for visits	D	1 year after last action
6.14.3	Visitors books/registers	D	7 years after last entry
6.14.4	Staff visits to other organizations	D	7 years after last action
7	<p><u>EQUIPMENT AND STORES</u> The acquisition, supply, management, maintenance and disposal of equipment and stores (consumable items) used by the organization.</p> <p>Examples of equipment are instruments, tools, machinery, plant and furniture. Examples of stores are stationery, medical supplies, kitchen and cleaning items and chemicals.</p> <p>See also <i>FLEET MANAGEMENT</i> and <i>PROPERTY MANAGEMENT</i> for related assets.</p> <p>See <i>TECHNOLOGY AND TELECOMMUNICATIONS</i> for equipment related to information technology and telecommunications (<i>e.g.</i> monitors, printers).</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	NB: Records relating to equipment used for unique purposes should be sentenced according to the organization's functional Retention and Disposal Schedule.		
7.1	<p>ACQUISITION The administrative processes associated with acquiring equipment or stores, through means such as purchase, leasing, and requisition.</p> <p>See <i>COMMON ACTIVITIES – Agreements/Contracting-Out/Joint Ventures</i> for equipment or stores acquired through contracts or tenders.</p> <p>See <i>PROPERTY MANAGEMENT – Fit-Outs</i> for equipment acquired as part of a fit-out.</p>		
7.1.1	Investigations (to determine organization requirements for equipment or stores) - for items purchased	D	7 years after last action
7.1.2	Investigations (to determine organization requirements for equipment or stores) - for items not purchased	D	3 years after last action
7.1.3	Asset registers		Refer to GDAFA
7.1.4	Delivery instructions for items received (e.g. packing slips)		Refer to GDAFA
7.1.5	Warranties and guarantees	D	Until item disposed of
7.1.6	Acquisition – reference material (e.g. catalogues, price lists)	D	When reference ceases
7.1.7	Acquisition – financial records		Refer to GDAFA

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
7.2	ALLOCATION The process of assigning equipment to employees or sections of the organization.		
7.2.1	Allocation and usage – equipment and stores (e.g. bookings logs)	D	2 years after last action
7.3	AUDIT		Refer to GDAFA
7.4	DISPOSAL The disposal of equipment or stores through means such as sale, auction, transfer, exchange or destruction. <i>See COMMUNITY RELATIONS – Donations for equipment or stores disposed of by means of donation.</i>		Refer to GDAFA
7.5	EVALUATION Records relating to the evaluation of the organization's equipment.		
7.5.1	Evaluation – equipment	D	2 years after last action
7.6	INSTALLATION Records relating to installation of organization equipment.		
7.6.1	Installation – equipment	D	3 years after last action
7.7	INSPECTIONS Inspections of organization equipment.		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
7.7.1	Inspections – equipment	D	7 years after last action
7.8	INSURANCE		Refer to GDAFA
7.9	INVENTORY Lists that count the number of items held by the organization. See <i>EQUIPMENT AND STORES – Stocktake</i> for listings used to assess items' condition and whether to replace them.		Refer to GDAFA
7.10	MAINTENANCE Records relating to the ongoing maintenance and repairs of organization equipment. See <i>COMMON ACTIVITIES – Agreements/Contracting-Out/Joint Ventures</i> for maintenance contracts and service agreements.		
7.10.1	Maintenance and repair of equipment	D	7 years after last action
7.11	STOCKTAKE The listing of items held in an organization, for the purpose of examining and valuing. See <i>EQUIPMENT AND STORES – Inventory</i> for lists of items counted.		Refer to GDAFA
8	<u>FLEET MANAGEMENT</u> Records relating to the acquisition, supply, usage, maintenance and disposal of vehicles. Vehicles are any means of conveyance owned or used by the		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>organization to transport people or items.</p> <p>NB: Where an organization manages specialized vehicles (e.g. ambulances, fire engines) as part of its core business, records relating to the vehicles should be sentenced in accordance with the organization's functional Retention and Disposal Schedule. The categories here may form a basis for such sentencing.</p>		
8.1	<p>ACCIDENTS Records relating to accidents and damage to organization vehicles.</p> <p>NB: This category does <i>not</i> cover accidents to organization staff or other persons.</p>		
8.1.1	Accidents – involving vehicles owned or used by the organization (not including injuries to staff or other persons)	D	7 years after last action
8.1.2	Injuries to staff (resulting from accidents)		Refer to GDAHRM
8.1.3	Compensation (resulting from accidents)		Refer to GDAHRM
8.2	<p>ACQUISITION Acquisition of vehicles for use by the organization, whether by lease, hire or purchase.</p>		
8.2.1	Acquisition (by lease, hire or purchase) – vehicles		Refer to GDAFA
8.2.2	Warranties and guarantees – organization vehicles	D	Until vehicle disposed of

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
8.3	ALLOCATION Allocations of organization vehicles for use by employees.		
8.3.1	Allocation of vehicles – management	D	3 years after last action
8.3.2	Vehicle bookings records	D	3 years after last action
8.3.3	Vehicle log books		Refer to GDAFA
8.4	ALLOWANCES Allowances associated with the use of organization vehicles.		
8.4.1	Allowances – vehicles		Refer to GDAFA
8.5	ARRANGEMENTS Arrangements associated with the use of organization vehicles.		
8.5.1	Arrangements – vehicles (e.g. parking, garaging)	D	3 years after last action
8.6	AUTHORISATION The seeking and granting of permission to use organization vehicles.		
8.6.1	Applications for use of vehicles – successful	D	7 years after authorisation expires
8.6.2	Applications for use of vehicles – unsuccessful	D	3 years after last action
8.7	DISPOSAL Disposal of organization vehicles, by any means.		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
8.7.1	Disposal – vehicles		Refer to GDAFA
8.8	INFRINGEMENTS Infringements involving organization vehicles.		
8.8.1	Infringements involving organization’s vehicles (e.g. parking offences, traffic offences)	D	3 years after action completed
8.9	INSURANCE		Refer to GDAFA
8.10	MAINTENANCE Records relating to the maintenance of organization vehicles. See <i>COMMON ACTIVITIES – Agreements / Contracting-Out / Joint Ventures</i> for maintenance contracts.		
8.10.1	Maintenance – vehicles (including servicing, repairs, and registration)	D	7 years after disposal of vehicle
9	<u>GOVERNMENT RELATIONS</u> The organization’s relationships and interactions with Ministers, Parliament and the political processes of government, and other Local, State, Commonwealth or overseas Governments. Includes Government liaison with bodies carrying out formal inquiries or investigations. NB: This keyword is NOT to be used for regular ongoing contact between Government agencies. Refer to the relevant keyword in this Authority, or sentence in accordance with the organization’s functional		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	Retention and Disposal Schedule.		
9.1	ENQUIRIES Requests for information from other governments or government organizations.		
9.1.1	Enquiries – detailed or significant information regarding the organization’s services and programs	D	5 years after last action
9.1.2	Enquiries – basic, general or routine information	D	2 years after last action
9.1.3	Enquiries – registers	D	5 years after last entry
9.2	INQUIRIES Official requests for information: investigations carried out by persons or bodies who are empowered to inquire and report on a subject, including Royal Commissions, Parliament and the Parliamentary Commissioner for Administrative Investigations (Ombudsman). See <i>GOVERNMENT RELATIONS – Enquiries</i> for general requests for information that come from other governments or government agencies. See <i>INFORMATION MANAGEMENT – Cases for Freedom of Information</i> requests.		
9.2.1	Investigations or inquiries (including evidence) - directly related to organizational functions, programs or services	A	5 years after last action
9.2.2	Investigations or inquiries (including evidence) - not related to	A	5 years after last action

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	organizational functions but requiring substantial organizational input (e.g. submissions, statements)		
9.2.3	Investigations or inquiries (including evidence) - requiring little or no action by the organization	D	3 years after last action
9.2.4	Inquiry recommendations – implementation	A	5 years after last action
9.2.5	Information distributed from Department of Premier & Cabinet (e.g. calls for submissions)	D	5 years after last action
9.3	<p>REPRESENTATIONS Records relating to responses to questions raised in Parliament on behalf of Members' constituents. Includes community-based representations (e.g. petitions) seeking a formal response.</p> <p>See <i>REPRESENTATIONS – MINISTERIALS – Parliamentary Questions</i> for Parliamentary Questions.</p>		
9.3.1	<p>Representations (including those from the community) – directed to the organization that</p> <ul style="list-style-type: none"> • result in a change to organizational policy or procedure, program or service; or • cover significant issues (whether or not the representation results in a change to policy, procedure, program or service) 	A	5 years after last action
9.3.2	<p>Representations (including those from the community) – directed to the organization, that</p> <ul style="list-style-type: none"> • do not result in a change to organizational policy or procedure, program or 	D	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	service; and • do not cover significant issues		
9.3.3	MINISTERIALS Priority requests for information that comes to an organization from the relevant Minister's office, usually requiring immediate action.		
9.3.3.1	Ministerials – regarding functional or operational issues, where not captured on a subject file NB: Ministerials that are captured on a subject file must be sentenced in accordance with their subject matter, in this Authority or the organization's approved functional Retention & Disposal Schedule.	A	5 years after last action
9.3.3.2	Ministerials – issued for informational purposes only, not requiring a response	D	3 years after last action
9.3.3.3	Ministerials – registers	D	7 years after last action
9.3.4	PARLIAMENTARY QUESTIONS Responses to Questions raised during Parliamentary sessions. Responses may or not be submitted and answered in writing.		
9.3.4.1	Answers to Parliamentary questions – master copies	A	5 years after last action
9.3.4.2	Answers to Parliamentary questions – other annotated copies	D	5 years after last action
9.3.4.3	Answers to Parliamentary questions – unannotated, reference or information copies	D	When reference ceases

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
9.4	<p>REPORTING To be used only for formal reporting against inter-organization or inter-governmental business plans.</p> <p>See <i>COMMON ACTIVITIES – Reporting</i> for other reporting carried out by the organization.</p> <p>See <i>STRATEGIC MANAGEMENT – Reporting</i> for formal reporting against organization business, corporate, or strategic plans.</p> <p>See <i>PUBLICATION</i> for records relating to production of the organization’s annual report.</p>		
9.4.1	Regular reporting – to other agencies or governments, relating to business plans	D	5 years after last action
9.4.2	Ad hoc or special reporting – to other agencies or governments, relating to functional issues	A	5 years after last action
9.4.3	Ad hoc or special reporting – to other agencies or governments, relating to other issues	D	5 years after last action
9.5	<p>SUBMISSIONS The preparation and submission of formal statements (e.g. reports, statistics) supporting a case or opinion held by the organization, submitted to another organization or within the organization.</p> <p>See <i>GOVERNMENT RELATIONS – Inquiries</i> for submissions produced by</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	the organization in response to inquiries.		
9.5.1	Cabinet submissions – created by the organization, master copies	A	5 years after last action
9.5.2	Cabinet submissions – prepared by other organizations and submitted for comment	D	When reference ceases
9.5.3	<p>Whole-of-government submissions to other organizations and other governments, co-ordinated by a central organization (e.g. Department of Premier and Cabinet) - organizational comments or contributions</p> <p>NB: Where a whole-of-government submission relates to the co-ordinating organization's core functions, the submission must be addressed in its functional Retention and Disposal Schedule and designated an ARCHIVE.</p>	D	5 years after last action
9.5.4	Submissions to other organizations and other governments - made directly by organization – significant submissions	A	5 years after last action
9.5.5	Submissions to other organizations and other governments - made directly by organization – submissions other than those in 9.5.4	D	2 years after last action
9.5.6	Submissions – reference copies	D	When reference ceases
9.6	<p>VISITS</p> <p>Records regarding official visitors, that is, those invited by the Government, and organization visits to other agencies or Governments (interstate or overseas).</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	See <i>COMMUNITY RELATIONS – Visits</i> for visits from the public or non-government organizations.		
9.6.1	Official visits – by organization personnel to other Governments	A	5 years after last action
9.6.2	Visits by dignitaries or delegations from other Governments	A	5 years after last action
9.6.3	Visits to organization – from other organizations’ personnel or Ministers	D	3 years after last action
9.6.4	Visits – arrangements (e.g. travel, security)	D	7 years after last action
10	<p><u>INFORMATION MANAGEMENT</u> The management of the organization’s information resources, such as records management, archives, Freedom of Information and intellectual property. Also includes the provision of services to internal and external clients, using information resources within the organization.</p> <p>See <i>TECHNOLOGY AND TELECOMMUNICATIONS</i> for records relating to information technology and communications equipment and systems (hardware, software, networks).</p>		
10.1	<p>ACQUISITION The administrative processes associated with acquiring information resources. Refer to the <i>General Disposal Authority for Financial Management Records</i> for financial records relating to acquisition.</p> <p>See <i>TECHNOLOGY AND TELECOMMUNICATIONS – Acquisition</i> for acquisition of information technology equipment such as computer hardware and software.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.1.1	Acquisition – external publications or library materials (including subscriptions)	D	3 years after last action
10.1.2	Reference material (e.g. catalogues, price lists)	D	When reference ceases
10.2	AUDIT The activities involved with checking operational records of information systems to ensure they are being maintained in the appropriate manner.		
10.2.1	File audits, censuses, or inspections of information systems (includes working papers, audit trails and system reports)	D	7 years after last action
10.3	CASES Requests for information from the organization, in accordance with the <i>Freedom of Information Act</i> or other written laws. See <i>GOVERNMENT RELATIONS – Inquiries</i> for requests for information from the Ombudsman or other officials. See <i>STRATEGIC MANAGEMENT – Reporting</i> for the organization’s annual Information Statement.		
10.3.1	Requests under Freedom of Information or other written laws, that: <ul style="list-style-type: none"> • set a precedent • lead to changes in organization policy • are of considerable public interest • are submitted to external review by the Supreme Court 	A	5 years after last action

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	NB: Archived requests must include copies of documents that are the subject of the request.		
10.3.2	Other requests under Freedom of Information or other written laws, including those: <ul style="list-style-type: none"> • submitted to external review by the Information Commissioner • submitted for internal review by the organization 	D	7 years after last action
10.3.3	FOI requests – register	D	7 years after last entry
10.3.4	Organization personnel nominated as Freedom of Information authorised personnel		Refer to GDAHRM
10.4	<p>CONSERVATION Records relating to the conservation and preservation of information materials.</p> <p>See <i>STRATEGIC MANAGEMENT – Risk Management</i> for the development and implementation of disaster recovery plans.</p> <p>See <i>PROPERTY MANAGEMENT – Conservation</i> for the conservation of organization premises.</p> <p>NB: Where the conservation of cultural heritage materials (e.g. museum pieces) is an essential element of the core business activities of the organization, Conservation should be included in the organization’s functional Retention and Disposal Schedule.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.4.1	Conservation – major activities including major preservation activities carried out on archival material	A	5 years after last action
10.4.2	Conservation – routine or minor activities	D	3 years after last action
10.5	<p>CONTROL Records relating to creating and maintaining control mechanisms for records and recordkeeping systems. Includes classification (which includes metadata), and indexing.</p> <p>See <i>INFORMATION MANAGEMENT - Distribution</i> for records relating to mail management.</p> <p>See <i>INFORMATION MANAGEMENT – Recordkeeping Plans</i> for records relating to all aspects of Recordkeeping Plans (including disposal authorities).</p> <p>See <i>INFORMATION MANAGEMENT – Disposal</i> for actions taken that relate to the final disposition of records (<i>i.e.</i> archiving or destruction).</p>		
10.5.1	Mail correspondence registers	D	7 years after last entry
10.5.2	Classification schemes, thesaurus/lists of authorised subject headings, file plans	R	Retain for life of organization
10.5.3	Recordkeeping systems – development and implementation	D	5 years after superseded
10.5.4	Minor control records (<i>e.g.</i> file creation forms, movement of records forms, processing forms)	D	When reference ceases

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.6	<p>CUSTOMER SERVICE The provision of information to external and internal clients. Includes organizational library services.</p> <p>See <i>INFORMATION MANAGEMENT – Acquisition</i> for records relating to acquisition of external publications.</p> <p>See <i>INFORMATION MANAGEMENT – Disposal</i> for the disposal of library materials.</p> <p>See <i>INFORMATION MANAGEMENT – Enquiries</i> for queries received by an organization.</p>		
10.6.1	Customer service practices and programs – development and implementation	D	5 years after last action
10.6.2	Customer service facilities (including library services) – management	D	5 years after last action
10.6.3	Library catalogues (hard copy or electronic) – individual catalogue entries	D	When reference ceases
10.6.4	Library catalogues (hard copy or electronic) – entire catalogue	D	Until catalogue discontinued or superseded
10.7	<p>DATA ADMINISTRATION The maintenance and use of data held in a system, either automated or manual, including data dictionaries.</p> <p>See <i>TECHNOLOGY AND TELECOMMUNICATIONS – Database Management</i> for the establishment and maintenance of databases.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.7.1	Recordkeeping information systems - planning	D	5 years after system discontinued or superseded
10.7.2	Maintenance of system data standards (e.g. metadata, data dictionaries)	D	5 years after system discontinued or superseded
10.8	<p>DISPOSAL Activities relating to the final disposition of records (i.e. archiving or destruction), and the disposal of library materials.</p> <p>See <i>INFORMATION MANAGEMENT – Recordkeeping Plans</i> for the development of the organization’s disposal authorities.</p>		
10.8.1	Lists of records transferred to State Records Office as archives	R	Retain for life of organization
10.8.2	Lists of archival transfers (supplied by State Records Office)	R	Retain for life of organization
10.8.3	Lists of records transferred to another organization	R	Retain for life of organization
10.8.4	Destruction lists, destruction certificates, and registers of records destroyed	R	Retain for life of organization
10.8.5	Disposal - records (i.e. destruction or transfer to State archives collection) – arrangements	D	5 years after last action
10.8.6	Disposal – library materials	D	7 years after last action
10.9	<p>DISTRIBUTION Records relating to disseminating items via internal or external mail.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>See <i>COMMON ACTIVITIES – Contracting-Out</i> for service arrangements with mail or courier service providers.</p> <p>See <i>INFORMATION MANAGEMENT – Control</i> for registers of correspondence.</p>		
10.9.1	Mail processing records (e.g. receipts, postage stamp registers, mail lodgement books)		Refer to GDAFA
10.9.2	Bulk mailouts	D	3 years after last action
10.9.3	Mailing lists, directories etc.	D	When superseded
10.10	<p>ENQUIRIES Records relating to requests for information that use the organization's information resources, e.g. library research.</p> <p>See <i>INFORMATION MANAGEMENT – Cases for Freedom Of Information</i> requests.</p>		
10.10.1	Enquiries – detailed or significant information	D	5 years after last action
10.10.2	Enquiries – basic or routine information	D	3 years after last action
10.10.3	Enquiries – registers	D	3 years after last entry
10.11	<p>EVALUATION Evaluation of the organization's information systems.</p>		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.11.1	Information systems of the organization – evaluation	D	7 years after last action
10.12	INTELLECTUAL PROPERTY Records relating to intellectual property held or maintained by the organization, including copyright, patents and trademarks.		
10.12.1	Copyright / patents / trademarks – held by the Crown and administered by the organization	D	7 years after copyright expires
10.12.2	Copyright / patents / trademarks – held by the organization	D	7 years after copyright expires
10.12.3	Requests to reproduce material (where the copyright is held by the organization)	D	7 years after last action
10.12.4	Applications by organization to reproduce material (where the copyright is held by another party)	D	7 years after last action
10.12.5	Royalties – received by the organization	D	7 years after last action
10.12.6	Infringements of organization's intellectual property	D	7 years after last action
10.13	RECORDKEEPING PLANS Records relating to Recordkeeping Plans and disposal authorities submitted to the State Records Office.		
10.13.1	Recordkeeping Plans – development and review	D	10 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.13.2	Disposal authorities (Retention and Disposal Schedules, Ad Hoc Disposal Schedules, Disposal Lists) - development and review	R	Retain for life of organization
10.13.3	Recordkeeping Plans and disposal authorities – master copies	R	Retain for life of organization
10.14	<p>SECURITY Records relating to security arrangements for sensitive and/or restricted access records, and records management systems.</p> <p>See <i>PROPERTY MANAGEMENT – Security</i> for security arrangements for organization property.</p>		
10.14.1	Sensitive records – appraisal of records	D	While relevant records exist
10.14.2	Sensitive records – security arrangements (e.g. viewing)	D	5 years after arrangements are revoked or superseded
10.14.3	Sensitive/restricted records – registers	D	While relevant records exist
10.14.4	Persons with permission to view restricted records – registers	D	After permission is revoked
10.14.5	Records management systems – security	D	5 years after last action
10.15	<p>STORAGE (AREAS) Areas for storage of records and archives.</p> <p>See <i>PROPERTY MANAGEMENT</i> for the management of other storage areas.</p>		
10.15.1	Onsite records storage areas – usage	D	3 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
10.15.2	Offsite storage areas – selection	D	3 years after last action
10.15.3	Offsite storage areas – usage (including transfers and retrievals)	D	5 years after last action
10.15.4	Storage areas – security	D	3 years after area ceases to be used
11	<p><u>LEGAL SERVICES</u> Legal services provided to the organization, including the handling of legal action and disputes, and legal advice and opinion, both in-house and external (including Crown Solicitor’s Office findings).</p> <p>See <i>STRATEGIC MANAGEMENT – Legislation</i> for legislation developed and/or administered by the organization, and that forms the legislative basis for their operations.</p> <p>See <i>COMMON ACTIVITIES – Compliance</i> for compliance with other legislation affecting the organization’s operations,</p> <p>NB: For records where the organization retains individual case files, e.g. Freedom of Information cases, properties or complaints, sentence according to the relevant function either in this Authority or the organization’s functional Retention and Disposal Schedule.</p>		
11.1	<p>ADVICE (LEGAL) Records relating to legal advice or opinion obtained for the organization.</p> <p>See also <i>COMMON ACTIVITIES – Advice</i> for non-legal advice received by the organization.</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
11.1.1	Legal advice or opinion – received from sources within the organization or from external sources (including Crown Solicitor’s Office)	A	5 years after last action
11.1.2	Reference material (assisting in the provision of legal advice)	D	When reference ceases
11.2	LITIGATION Records relating to litigation and other legal action taken against the organization.		
11.2.1	Legal action - of major public interest/controversy, setting a precedent, or resulting in a major change to organization policy or procedures	A	5 years after case completed
11.2.2	Legal action – other than that covered in 11.2.1	D	10 years after completed, or expiry of the statute of limitations, whichever is later
11.2.3	Subpoenas – received by organization (includes arrangements for organization personnel to attend court)	D	2 years after last action
12	<u>PROPERTY MANAGEMENT</u> Records relating to property (land or buildings) owned, leased or rented by the organization. Includes offices, workshops, storage and residential property, as well as the removal of pollutants and waste. See <i>INFORMATION MANAGEMENT – Storage (areas)</i> for premises used for storing records and archives. Refer to the <i>General Disposal Authority for Human Resources</i>		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>Management Records for records relating to occupational health and safety.</p> <p>NB: Records relating to specialized premises that directly serve the functions of the organization (e.g. busports) should be sentenced according to the organization's functional Retention and Disposal Schedule.</p>		
12.1	<p>ACCIDENTS Records relating to accidents or damage to organization property.</p> <p>See <i>PROPERTY MANAGEMENT – Security</i> for reports of security breaches, including illegal entry to organizational property.</p>		
12.1.1	Accidents or damage to property – major	A	5 years after last action
12.1.2	Accidents or damage to property – minor	D	7 years after last action
12.1.3	Accidents or hazardous situations – records providing proof (including accident or incident registers)		Refer to GDAHRM
12.1.4	Accidents involving organization staff		Refer to GDAHRM
12.2	<p>ACQUISITION Records relating to acquiring property for use by the organization.</p>		
12.2.1	Title deeds, certificates of title		After disposal, transfer documents to new owner
12.2.2	Acquisition - buildings of significance, including:		Refer to GDAFA

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<ul style="list-style-type: none"> • National Trust classified or Heritage listed buildings, • specialized buildings, and • controversial purchases of buildings or land. 		
12.2.3	Acquisition - other buildings, such as: <ul style="list-style-type: none"> • general office accommodation, and • staff housing 		Refer to GDAFA
12.3	ARRANGEMENTS Arrangements for the use of the organization's property.		
12.3.1	Arrangements (property use, including parking) – including registers	D	3 years after last action
12.4	CONSERVATION The preservation and protection of the organization's property.		
12.4.1	Conservation – significant property, including: <ul style="list-style-type: none"> • heritage-listed buildings, • Aboriginal sites, and • contaminated or potentially contaminated sites 	A	5 years after last action
12.4.2	Conservation orders or notices	A	5 years after last action
12.4.3	Conservation – other property	D	5 years after last action
12.5	CONSTRUCTION Records relating to construction work carried out on organization property.		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
12.5.1	Construction – maps, plans and surveyors' reports	A	5 years after last action
12.5.2	Construction – capital works		Refer to GDAFA
12.5.3	Construction – minor and other works		Refer to GDAFA
12.6	<p>DISPOSAL The disposal of organization property, by any means.</p> <p>See <i>PROPERTY MANAGEMENT – Hazards</i> for the disposal of hazardous material.</p> <p>See <i>PROPERTY MANAGEMENT – Maintenance</i> for the disposal of other waste material.</p>		
12.6.2	Disposal – properties of historical or heritage significance, or of major public interest or controversy	A	5 years after disposal
12.6.3	Disposal – other properties	D	7 years after disposal
12.7	<p>FIT-OUTS Records relating to the internal refurbishing of property.</p> <p>See <i>EQUIPMENT AND STORES – Acquisition</i> for furnishings and equipment not acquired as part of a fit-out.</p>		
12.7.1	Major capital works		Refer to GDAFA

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
12.7.2	Fit-outs or refurbishments of premises	D	5 years after last action
12.8	INSPECTIONS Inspections of the organization's property.		
12.8.1	Inspections – not relating to occupational health & safety	D	7 years after last action
12.8.2	Inspections – occupational health and safety		Refer to GDAHRM
12.9	INSURANCE		Refer to GDAFA
12.10	INSTALLATION Records of installation of utilities in the organization's properties. See <i>EQUIPMENT AND STORES – Installation</i> for installation of other equipment.		
12.10.1	Installation of utilities (e.g. air conditioning, lighting, plumbing)	D	5 years after disposal of utility
12.11	LEASING Records relating to the leasing of organization property.		
12.11.1	Tenancy agreements	D	7 years after expiry of agreement
12.12	MAINTENANCE Maintenance or repairs carried out on organization property. See <i>COMMON ACTIVITIES – Contracting-Out</i> for maintenance contracts or		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	service agreements.		
12.12.1	Repairs – major, or necessitated through disasters (e.g. fire, flood)	A	5 years after last action
12.12.2	Repairs – other than those covered by 12.12.1	D	7 years after last action
12.12.3	Maintenance – programs	D	7 years after last action
12.12.4	Maintenance – using hazardous substances (e.g. pest control)	D	30 years after last action
12.12.5	Waste management (including recycling)	D	3 years after last action
12.13	MOVING Records relating to the moving or relocation of the organization's business units or premises.		
12.13.1	Moving or relocation – business units or premises	D	7 years after last action
12.14	OCCUPATIONAL HEALTH AND SAFETY		Refer to GDAHRM
12.15	PLANNING Planning or development activities associated with organization property.		
12.15.1	Planning and development - properties with historical or heritage significance, or of major public interest or controversy	A	5 years after last action
12.15.2	Planning and development – other properties	D	30 years after last action

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
12.16	<p>RISK MANAGEMENT Records relating to the identification of risks and hazards to organization property, including reports of emergencies or disasters.</p> <p>See <i>STRATEGIC MANAGEMENT – Risk Management</i> for the development and implementation of risk management plans.</p>		
12.16.1	Reports of emergencies or disasters – major, or leading to a change in policy or procedure	A	5 years after last action
12.16.2	Reports of emergencies or disasters – other	D	7 years after last action
12.16.3	Property risk registers		Refer to GDAFA
12.16.4	Insurance		Refer to GDAFA
12.16.5	HAZARDS		
12.16.5.1	Hazardous substances or toxic waste – presence and/or removal		Refer to GDAHRM
12.16.5.2	Asbestos – use, presence, neutralisation and removal		Refer to GDAHRM
12.17	<p>SECURITY Security arrangements for organizational property.</p> <p>See <i>GOVERNMENT RELATIONS – Visits</i> for security arrangements for dignitaries or high risk individuals visiting the organization.</p>		
12.17.1	Security arrangements (e.g. issuing of passes or keys, storage, locks,	D	5 years after system or

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	surveillance)		procedures revoked or superseded
12.17.2	Security card / pass holders – registers	D	7 years after last action
12.17.3	Security breaches – reports and investigations (including illegal entry to property whether or not resulting in damage or theft)	D	7 years after last action
12.17.4	Surveillance tapes – showing evidence of security breaches or other incidents, required as evidence in litigation cases NB: If a tape forms part of a case file, it should be sentenced in accordance with the related case records.	D	7 years after last action
12.17.5	Surveillance tapes – showing no evidence of security breaches or other incidents	D	3 months after last action
12.17.6	Insurance claims		Refer to GDAFA
12.17.7	Emergency services – arrangements for provision (including fire wardens, safety wardens and first aid officers)	D	2 years after last action
12.17.8	Emergency officers (e.g. wardens, first aid officers) – registers	D	7 years after last action
13	<u>PUBLICATION</u> Works in all media, developed by or for the organization, issued for distribution or sale. Includes the drafting, production, supply and distribution of publications. NB: FOUR COPIES OF ALL PUBLICATIONS MUST BE LODGED WITH		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>THE J.S. BATTYE LIBRARY OF WEST AUSTRALIAN HISTORY, IN ACCORDANCE WITH PREMIER'S CIRCULAR 8/01.</p> <p>See <i>COMMUNITY RELATIONS – Advertising and Publicity</i> for organizational advertisements run in external publications.</p> <p>See <i>INFORMATION MANAGEMENT – Copyright</i> for records relating to copyright.</p> <p>See <i>INFORMATION MANAGEMENT – Acquisition</i> and <i>INFORMATION MANAGEMENT – Disposal</i> for the acquisition and disposal of publications NOT produced by the organization.</p>		
13.1	<p>ORGANIZATIONAL PUBLICATIONS Includes publications for an external audience (e.g. articles in professional journals, conference proceedings), internal publications (e.g. induction manuals, staff newsletters), and material intended for promotional purposes (e.g. leaflets).</p> <p>See <i>COMMUNITY RELATIONS – Media Relations</i> for media releases.</p>		
13.1.1	<p>Publications produced by or for the organization (including the annual report)</p>		Lodge four copies with J.S. Battye Library of West Australian History as per Premier's Circular 8/01
13.1.2	<p>Articles (prepared by the organization or by organization personnel, incorporated into external publications) – master copies</p>	A	5 years after last action
13.1.3	<p>Organization publications – other copies</p>	D	When reference ceases

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
13.1.4	Legal deposit arrangements	D	7 years after last action
13.2	CORPORATE STYLE Style requirements (e.g. writing style, graphic design) to be adhered to in the production of organization documents and publications.		
13.2.1	Corporate style (including letterheads, layout, and logos) – development and implementation	D	5 years after last action
13.2.2	Style manuals	D	When superseded or when reference ceases
13.3	DISTRIBUTION Arrangements for the dissemination of publications.		
13.3.1	Distribution and supply of organization publications – arrangements (including subscriptions and distribution lists)	D	3 years after last action
13.3.2	Distribution and subscriptions – financial records		Refer to GDAFA
13.4	DRAFTING Activities associated with preparing drafts of publications. See <i>COMMON ACTIVITIES – Policy</i> and <i>COMMON ACTIVITIES - Procedures</i> for drafting of policies and procedures.		
13.4.1	Drafts of publications (including notes and reference material)	D	3 years after last action
13.4.2	Working copies with annotations	D	2 years after last action

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
13.4.3	Proposed amendments to publications	D	2 years after last action
13.5	ENQUIRIES Enquiries from external parties regarding publications.		
13.5.1	Enquiries and requests - regarding publications	D	2 years after last action
13.6	PRODUCTION Activities associated with producing organization publications. <i>See TECHNOLOGY AND TELECOMMUNICATIONS – Application Development for the technical aspects of developing electronic publications.</i>		
13.6.1	Production of publications – aspects (e.g. binding, desktop publishing, design, printing, layout, filming)	D	2 years after last action
13.6.2	Proofs, mock-ups and artwork	D	2 years after last action
14	<u>STRATEGIC MANAGEMENT</u> Activities involved in the broad systematic management planning of an organization, and activities related to long term strategic and managerial objectives. Includes business plans, operational plans, mission statements, and the development and amendment of legislation providing the legislative basis for the organization.		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	See <i>COMMON ACTIVITIES – Policy</i> for policy development and implementation.		
14.1	AUDIT Records relating to internal and external audits of the organization.		
14.1.1	Audits – organizational functions or activities, resulting in changes to policy or procedures	A	5 years after last action
14.1.2	Audits – organizational functions or activities, not resulting in changes to policy or procedures	D	7 years after last action
14.1.3	Audits – accounting		Refer to GDAFA
14.1.4	Audits – occupational health and safety		Refer to GDAHRM
14.2	CODE OF CONDUCT Codes of behaviour that are to be adhered to by employees of the organization. NB: Codes of Conduct signed by individuals are to be placed on the relevant personal file.		
14.2.1	Code of Conduct – development	D	5 years after last action
14.2.2	Code of Conduct – if published		Lodge four copies with J.S. Batty Library of West Australian History as per Premier’s Circular 8/01

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
14.2.3	Code of Conduct – master copy, if not published	A	5 years after last action
14.3	<p>CUSTOMER SERVICE The planning, development, and monitoring of services for customers, at the strategic level.</p> <p>See <i>COMMUNITY RELATIONS – Customer Service</i> and <i>INFORMATION MANAGEMENT – Customer Service</i> for the development and management of specific customer service facilities.</p> <p>See <i>COMMUNITY RELATIONS - Enquiries</i> for requests for information.</p>		
14.3.1	Customer service strategies – development and implementation	A	5 years after last action
14.4	<p>EVALUATION Activities associated with the evaluation and ongoing monitoring of potential or existing organization programs.</p> <p>See <i>STRATEGIC MANAGEMENT – Audit</i> for formal audits of organizational functions or programs.</p>		
14.4.1	Evaluation – organization programs or services	D	5 years after last action
14.4.2	Evaluation – employees		Refer to GDAHRM
14.4.3	Performance indicators – development	D	5 years after last action
14.5	<p>LEGISLATION Records relating to the development of organization legislation, as well as</p>		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>comments made by the organization regarding other legislation.</p> <p>See <i>LEGAL SERVICES</i> for legal services provided to the organization, including legal advice and the handling of legal action.</p>		
14.5.1	<p>Development of legislation (including Acts, Bills, regulations and amendments) forming the legislative basis for the organization, including:</p> <ul style="list-style-type: none"> • proposals, • consultations, • reviews, • submissions, • drafts, and • explanatory notes 	A	5 years after last action
14.5.2	Legislation – requests for interpretation (e.g. legal advice)	A	5 years after last action
14.5.3	Other legislation affecting organization functions – significant comments and contributions	A	5 years after last action
14.5.4	Other legislation affecting organization functions – minor comments and contributions	D	10 years after last action
14.5.5	Other legislation , not affecting organization functions – comments and contributions	D	10 years after last action
14.6	<p>PERFORMANCE MANAGEMENT</p> <p>Activities relating to the strategic-level development of practices for identifying, evaluating and developing corporate and employee work performance.</p>		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<p>See also <i>STRATEGIC MANAGEMENT – Evaluation</i> for the evaluation of organizational programs or services, including the development of performance indicators.</p> <p>Refer to the <i>General Disposal Authority for Human Resource Management Records</i> for records relating to performance management as applied to individual organization personnel.</p>		
14.6.1	Performance management practices – development	D	5 years after last action
14.7	<p>PLANNING Records relating to planning to achieve organizational objectives. Includes contributions to whole-of-government planning.</p> <p>See <i>PROPERTY MANAGEMENT – Planning</i> for planning and development related to property or land.</p> <p>See <i>STRATEGIC MANAGEMENT – Risk Management</i> for records relating to risk management and disaster recovery plans.</p>		
14.7.1	Organization-wide strategic, corporate and business plans – development, final plan and implementation	A	5 years after last action
14.7.2	Operational or administrative plans , including sectional or unit plans derived from organization-wide plans – development, final plan and implementation	D	5 years after superseded
14.7.3	Whole-of-government planning – significant organizational contributions	A	5 years after last action

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
14.7.4	Whole-of-government planning – non-significant organizational contributions	D	5 years after last action
14.7.5	Plans – financial (e.g. budgeting)		Refer to GDAFA
14.7.6	Reference materials used in developing plans	D	When reference ceases
14.8	REPORTING Formal reporting against organization business, corporate, operational, or strategic plans. See <i>COMMON ACTIVITIES – Reporting</i> for records relating to statistics and surveys.		
14.8.1	Reports – functional activities , not reproduced elsewhere	A	5 years after last action
14.8.2	Reports – functional activities , reproduced elsewhere (e.g. in the annual report)	D	7 years after last action
14.8.3	Reports – financial and accounting (e.g. Treasurer’s reports, financial statements)	D	Refer to GDAFA
14.8.4	Reporting – other activities	D	5 years after last action
14.9	RISK MANAGEMENT The identification of risk and the implementation of appropriate practices to reduce the impact of material and economic loss arising from an incident, and allow the organization to continue providing essential services.		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	See also <i>INFORMATION MANAGEMENT – Conservation</i> for the conservation and preservation of information resources.		
14.9.1	Risk management plans (including disaster recovery) – development, final copy and implementation	D	7 years after plan superseded
14.9.2	Risk management plans (including disaster recovery) – implementation of plan following major disasters or serious incidents	A	5 years after last action
14.9.3	Risk management plans (including disaster recovery) – implementation of plan following other incidents	D	5 years after last action
14.10	<p>STANDARDS Refers to standards produced by the organization.</p> <p>See <i>COMMON ACTIVITIES – Compliance</i> for organization compliance with external or internal standards.</p> <p>See <i>PUBLICATION</i> for the production of organizational standards as publications.</p>		
14.10.1	Standards – if published		Lodge four copies with J.S. Batty Library of West Australian History as per Premier’s Circular 8/01
14.10.2	Standards – master copies (if not published)	A	5 years after last action
14.10.3	Standards – development	D	5 years after last action

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
14.10.4	Supplementary material (e.g. drafts, working papers)	D	3 years after last action
15	<p><u>TECHNOLOGY AND TELECOMMUNICATIONS</u> The acquisition, management and disposal of information technology systems and services: hardware, software, equipment, applications, databases, and the technical aspects of Internet use, intranets and web sites developed or implemented by the organization. Includes the management of communication systems such as voice mail, electronic mail, and facsimile.</p> <p>NB: The categories listed under this keyword refer to records of the systems, data or applications used by the organization, and NOT the systems, data or applications themselves.</p> <p>See also <i>INFORMATION MANAGEMENT</i> for records relating to information resources .</p>		
15.1	<p>ACQUISITION Acquisition of technology or telecommunications equipment, systems, or applications.</p> <p>Refer to the <i>General Disposal Authority for Financial and Accounting Records</i> for financial records relating to acquisition.</p>		
15.1.1	<p>Systems or applications that become operational – non-financial records relating to:</p> <ul style="list-style-type: none"> • feasibility studies, 	D	7 years after system discontinued or superseded

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	<ul style="list-style-type: none"> • investigations, • selection, • analysis, • modification, and • purchase 		
15.1.2	Systems that do not become operational – non-financial records relating to: <ul style="list-style-type: none"> • feasibility studies, • investigations, and • analysis 	D	3 years after last action
15.1.3	Acquisition – equipment, communications systems, software (including software licences and upgrades)		Refer to GDAFA
15.1.4	Warranties and guarantees – equipment, communications systems, software	D	Until item disposed of
15.2	ALLOCATION Records relating to assigning technology or telecommunications services to employees.		
15.2.1	Allocation – services (e.g. email accounts)	D	2 years after last action
15.3	APPLICATION DEVELOPMENT The development or modification of software and programming code to perform business applications. Includes development of web sites. NB: Original software should only be discontinued/destroyed if data and associated metadata that needs to be retained has been migrated,		

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Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	or can be read and/or manipulated by subsequent systems.		
15.3.1	Applications that become operational – development and design	D	7 years after application discontinued or superseded
15.3.2	Applications that do not become operational – development and design	D	3 years after last action
15.4	AUDIT Audits of technology or communications systems.		
15.4.1	Audits – technology or communication systems	D	7 years after last action
15.4.2	Audits – financial		Refer to GDAFA
15.5	CONTROL The creation, maintenance and evaluation of control mechanisms and change requests for systems. NB: Records relating to systems supporting specific organization functions should be sentenced in accordance with the organization's functional Retention and Disposal Schedule.		
15.5.1	System control mechanisms (e.g. authenticity, version control) - development and maintenance	D	7 years after system discontinued
15.5.2	System logs – showing history of access or changes to data	D	7 years after last action
15.5.3	System logs – not showing history of access or changes to data	D	3 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
15.5.4	<p>Metadata – allocation and maintenance</p> <p>NB: This category refers to records about metadata, NOT the metadata itself.</p>	D	3 years after last action
15.5.5	Lists (e-mail, telephone etc.) – maintenance	D	When reference ceases
15.6	<p>DATABASE MANAGEMENT Records relating to the building, prototyping, and testing of databases.</p> <p>See <i>INFORMATION MANAGEMENT – Data Administration</i> for activities associated with the maintenance of data in a system (electronic or manual).</p>		
15.6.1	Databases – development (including usage protocols), modification and design	D	7 years after database discontinued
15.6.2	<p>Database management – routine reports (on matters such as testing, monitoring and backups of data)</p> <p>NB: This category refers to reporting on database management only, and does NOT include backup tapes.</p>	D	3 years after last action
15.7	<p>DISPOSAL Records relating to disposal of technology or communications equipment.</p>		
15.7.1	Disposal – hardware, software or communications equipment	D	7 years after disposal of equipment
15.8	<p>EVALUATION The process of determining whether systems or applications meet the needs</p>		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
	of the organization. See <i>TECHNOLOGY AND TELECOMMUNICATIONS – Reviewing</i> for the re-evaluating of systems or equipment held by the organization.		
15.8.1	Systems or applications investigated and purchased – feasibility studies, investigations, analysis	D	7 years after system discontinued
15.8.2	Systems or applications investigated but not purchased – feasibility studies, investigations, analysis	D	3 years after last action
15.9	IMPLEMENTATION Implementation of applications or systems in the organization.		
15.9.1	Implementation of applications or systems (including monitoring and post-implementation reviews)	D	5 years after system discontinued or superseded
15.10	INSTALLATION Records relating to installing technology and telecommunications equipment.		
15.10.1	Installation – hardware and software	D	5 years after last action
15.11	MAINTENANCE Repairs or maintenance carried out on the organization’s information technology or communications equipment. See also <i>COMMON ACTIVITIES – Contracting-Out/Tendering</i> for maintenance contracts or service agreements.		

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
15.11.1	Repairs – major	D	7 years after last action
15.11.2	Repairs and maintenance – minor or routine	D	2 years after last action
15.12	<p>OPERATIONS The day-to-day operation of systems.</p> <p>See <i>COMMON ACTIVITIES – Contracting</i> for maintenance contracts.</p>		
15.12.1	Systems support mechanisms – management	D	5 years after last action
15.12.2	Support services records (e.g. help desks, fault reports)	D	2 years after last action
15.12.3	Operation manuals and documentation	D	After system or application is discontinued or superseded
15.12.4	System usage records (e.g. Internet services logs)	D	2 years after last action
15.13	<p>REVIEWING The process of re-evaluating of systems or equipment held by the organization.</p> <p>See <i>TECHNOLOGY AND TELECOMMUNICATIONS – Evaluation</i> for the process of determining whether systems or applications meet the needs of the organization.</p>		
15.13.1	Reviewing – systems or equipment	D	5 years after last action

GENERAL DISPOSAL AUTHORITY FOR ADMINISTRATIVE RECORDS

Ref No.	Description of Records	Disposal Action A = Archive D = Destroy R = Retain	Recommended Custody
15.14	<p>SECURITY Security measures to protect systems or information from accidental or intentional damage or from unauthorised access.</p> <p>See <i>PROPERTY MANAGEMENT – Security</i> for the security of organizational property (access to premises, etc.)</p>		
15.14.1	Security arrangements of systems	D	5 years after arrangements revoked or superseded
15.14.2	Security restrictions (for different levels of access and use of system, e.g. user IDs, passwords, codes)	D	5 years after revoked or superseded
15.14.3	Security breaches – reports and investigations	D	7 years after last action
15.14.4	Applications for user accounts (electronic mail, etc.)	D	2 years after suspended or revoked

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