

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8



PROS 07/01 VAR 8

Retention and Disposal Authority for Records of Common Administrative Functions

Issued Date: 19/03/2024

Retention and Disposal Authority for Records of Common Administrative Functions

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Introduction

Limitation of Scope

Authority covers records of common administrative functions that may be performed by the Government of Victoria. It does not authorise the disposal of records of functions that are unique to an agency(s). An agency specific Retention and Disposal Authority (RDA) is required for the authorised disposal of functionally unique records. Where there is conflict between this Authority and an agency specific RDA or where there are unique retention requirements, please contact PROV for advice. Throughout this Authority, cross-references to specific RDAs are highlighted. If there is a lead agency responsible for a particular function or activity, the Authority indicates to the relevant lead agency to use its own specific RDA. For example, class 7.4.0 indicates that for records of Cabinet Secretariat, the Department of Premier and Cabinet RDA is to be used.

Replacement of existing disposal coverage

This Authority replaces PROS 96/13, General Retention and Disposal Authority for Common Administrative Records. If your agency's specific RDA covers records of common administrative functions, consult Public Record Office Victoria for advice regarding which RDA is to be used.

Records already sentenced using PROS 96/13

After April 2007, PROS 96/13 may not be used to sentence any records. If records have been already sentenced for destruction before the issue of this Authority, the sentences may remain and agencies need not re-sentence those records. However, all records held by the agency which are sentenced as Permanent or that must be retained for over 30 years (e.g. Consolidated Employment History Files) must be re-sentenced using the new Authority.

Retention and Disposal Authority for Records of Common Administrative Functions

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Public Records Act 1973 (Section 12)

General Retention and Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to the records of common administrative functions, issued as Public Record Office Standard (PROS) 07/01 on 23 April 2007, as follows:

- Extension of scope to include municipalities. This Standard now applies to all Victorian government agencies.
- Revision of function 14.0.0 Property Management to provide coverage for property management activities undertaken by municipalities, including the addition of the following new record classes for this function:
 - 14.3.2 Records of activities undertaken to manage properties identified as having local significance.
Permanent - Retain as State Archives.
 - 14.7.2 Records of the installation of equipment intended for exclusive use by the public.
Temporary - Destroy 25 years after removal or replacement of equipment
 - 14.11.9 Records of the structural maintenance of property equipment intended for exclusive or extensive use by the public.
Temporary- Destroy 7 years after action completed
- Addition of new activity 5.13.0 Loans Management and the following new record class:
 - 5.13.1 Records relating to the borrowing of money by an agency.
Temporary - Destroy 7 years following finalisation of the loan.

This Variation shall have effect from its date of issue.

[signed]

Justine Heazlewood Director and Keeper of Public Records

Date of issue: 21 August 2009

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Variation 2

Public Records Act 1973 (Section 12)

General Retention and Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to the records of common administrative functions, issued as Public Record Office Standard (PROS) 07/01 on 23 April 2007, as follows:

7.4.0 GOVERNMENT RELATIONS - Cabinet Business Management

The following changes to record classes under this activity have been made:

- Class 7.4.2 - description and disposal action has been amended;
- Class 7.4.3 - additional new class;
- Classes 7.4.4 & 7.4.5 - these are additional new classes to replace what was previously class 7.4.3.

19.5.0 TECHNOLOGY & TELECOMMUNICATIONS - Control

The following changes to record classes under this activity have been made:

- Class 19.5.2 - description and disposal action amended. The internet access logs have been removed from this class and placed into class 19.5.6
- Class 19.5.6 - additional new class

This Variation shall have effect from its date of issue.

[signed]

Justine Heazlewood Director and Keeper of Public Records

Date of issue: 28 June 2013

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Variation 3

Public Records Act 1973 (Section 12)

General Retention and Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to the records of common administrative functions, issued as Public Record Office Standard (PROS) 07/01 on 23 April 2007, as follows:

Inclusion of the following new classes:

- 5.1.9 Records containing cardholder data captured as part of an electronic financial transaction including information printed, processed, transmitted or stored in any form on a payment card.

Temporary - Destroy 3 months after last business, legal and/or regulatory action.

- 5.1.10 Records containing sensitive cardholder authentication data captured as part of an electronic financial transaction.

Temporary - Destroy after action completed.

This Variation shall have effect from date of issue.

[signed]

Justine Heazlewood Director and Keeper of Public Records

Date: 21 July 2015

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Variation 4

Public Records Act 1973 (Section 12)

General Retention and Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to the records of common administrative functions, issued as Public Record Office Standard (PROS) 07/01 on 23 April 2007, as follows:

- Inclusion of the following new classes:
 - 7.5.2 Duplicate copies of submissions to an inquiry held by the agency for reference until the work of the inquiry is complete.
Temporary - Destroy after the inquiry's final report is tabled or submitted.

 - 7.5.5 Duplicate copies of records documenting inquiries with no direct relation to the agency's core function and where the agency made a minor contribution.
Temporary - Destroy after the inquiry's final report is tabled or submitted.

- Class 7.5.2 renumbered as 7.5.3.

- Class 7.5.3 and 7.5.4 renumbered as 7.5.4 and 7.5.6.

- Removal of caveats from the description category to allow broader application of the RDA.

This Variation shall have effect from date of issue.

[signed]

Justine Heazlewood Director and Keeper of Public Records

Date: 6 March 2017

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Variation 5

Public Records Act 1973 (Section 12)

Retention & Disposal Authority for Records of Common Administrative Functions (PROS 07/01)

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to records of Common Administrative Functions, issued as Public Record Office Standard (PROS 07/01) on 23/04/2007, as follows:

Extension of the application of this Authority until varied or revoked.

The addition of the following text to the scope of the RDA and across the body of the RDA as a footer:

This Retention and Disposal Authority **must not be used** for records about child sexual abuse incidents, allegations nor an agency's prevention, identification and response to such incidents and allegations. This includes records of this nature created through an agency's reporting, oversight or regulatory relationships with other agencies.

Instead **agencies must use PROS 19/08** Retention and Disposal Authority for Records of Organisational Response to Child Sexual Abuse Incidents and Allegations.

This Variation shall have effect from its date of issue.

[signed]

Justine Heazlewood Director and Keeper of Public Records

Date of issue: 02/09/2019

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Variation 6

Public Records Act 1973 (Section 12)

General Retention and Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to records of Common Administrative Functions, issued as Public Record Office Standard (PROS 07/01) on 23/04/2007, as follows:

Inclusion of the following new activity and classes:

- **Activity 11.13:** Public Health Compliance - Adherence to recordkeeping requirements established by government authorities to protect and improve the public health of the community.
- **Class 11.13.1:** Register or record of contact tracing information - Records documenting attendees at a premises to enable contact tracing if required for public health reasons. Includes a register or record of the names of all persons (including staff) attending an agency premise, their contact information, and the date and time they visited the premises.
Temporary - Destroy in accordance with the Directions issued by the public health authority (e.g. Department of Health and Human Services).
- **Class 12.5.8:** Drug and alcohol testing of employees - Records documenting drug and alcohol testing of agency employees. This includes records of consent by an employee to undertake drug and/or alcohol testing on-the-job, and the results stemming from testing of employees.
Temporary - Destroy 7 years after action completed.

This Variation shall have effect from its date of issue.

[signed]

Justine Heazlewood

Director and Keeper of Public Records

Date of issue: 01/07/2020

Retention and Disposal Authority for Records of Common Administrative Functions

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Variation 7

Public Records Act 1973 (Section 12)

General Retention and Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to records of Common Administrative Functions, issued as Public Record Office Standard (PROS 07/01) on 23/04/2007, as follows:

Adding text to existing classes:

- **11.13.1:** "Also includes records of staff attestations, which attest staff are fit and healthy to work prior to commencing a shift or day's work such as indications they are free from symptoms. Attestations may be presented in verbal or written form, and can include results from testing."
- **12.5.4:** "Includes the recording of evidence that is required relating to conditions of employment that are mandated by an employer or mandated by relevant legislation, such as public health orders."

Inclusion of the following new class:

- **12.5.9:** "Records collected relating to conditions of employment that are mandated by an employer or mandated by relevant legislation, such as public health orders. Includes copies of records pertaining to staff vaccine certification, medical exemptions, and any other records which are provided by an employee to an employer to demonstrate compliance with public health orders." Temporary – Destroy after compliance with employment condition is verified

This Variation shall have effect from its date of issue.

[Approved]

Justine Heazlewood

Director and Keeper of Public Records

Date of issue: 23/11/2021

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Variation 8

Public Records Act 1973 (Section 12) Retention & Disposal Authority for Records of Common Administrative Functions

Public Record Office Standard (PROS) 07/01

In accordance with section 12 of the *Public Records Act 1973* (as amended), I hereby vary the Standard applying to records of Common Administrative Functions, issued as Public Record Office Standard (PROS 07/01) on 23/04/2007, as follows:

Four functions and their corresponding disposal classes, described in the table below, are removed in their entirety from PROS 07/01 and replaced in full by PROS 24/03 Human Resources Management Function.

PROS 07/1 Functions removed	Replaced by
Function 8 Industrial Relations	PROS 24/03 Function 3 Industrial Relations
Function 11 Occupational, Health & Safety	PROS 24/03 Function 2 Health, Wellbeing and Safety
Function 12 Personnel Management	PROS 24/03 Function 1 Employment Management and PROS 24/03 Function 5 Volunteer Management
Function 17 Staff Development	PROS 24/03 Function 3 Staff Development

All cross-references to any of the above Functions are removed from PROS 07/01 and replaced by a cross-reference to PROS 24/03.

This Variation shall have effect from its date of issue.

[Approved]

Justine Heazlewood, Director and Keeper of Public Records

Date of issue: 19/03/2024

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

Retention and Disposal Authority for Records of Common Administrative Functions

Retention and Disposal Authority No	PROS 07/01 VAR 8
Scope	<p>The scope of this Standard is the common administrative functions for all Victorian government agencies, including municipalities.</p> <p>This Retention and Disposal Authority must not be used for records about child sexual abuse incidents, allegations nor an agency's prevention, identification and response to such incidents and allegations. This includes records of this nature created through an agency's reporting, oversight or regulatory relationships with other agencies. Instead agencies must use PROS 19/08 Retention and Disposal Authority for Records of Organisational Response to Child Sexual Abuse Incidents and Allegations.</p>
Status	Issued by Keeper
Issue Date	19 March 2024

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

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List of Functions and Activities covered

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Introduction

Purpose of this Authority

The purpose of this Authority is to provide a mechanism for the disposal of public records in accordance with the *Public Records Act 1973*. The Authority:

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

Context of this Authority

Public Record Office Victoria Standards

This Authority should be used in conjunction with the Standards issued by the Keeper of Public Records under Section 12 of the *Public Records Act 1973*. Copies of all relevant PROV standards, specifications and regulatory advice can be downloaded from www.prov.vic.gov.au. These documents set out the procedures that must be followed by Victorian public offices.

Disposal of records identified in the Authority

Disposal of public records identified in this Authority must be undertaken in accordance with the requirements of Public Record Office Standard - *Disposal*.

It is a criminal offence to unlawfully destroy a public record under s 19(1) of the *Public Records Act 1973*.

The destruction of a public record is not unlawful if done in accordance with a Standard established under s 12 of the *Public Records Act 1973*.

This Standard (also known as an Authority) authorises the disposal of public records as described within its provisions. However, disposal is **not** authorised under this Standard if it is reasonably likely that the public record will be required in evidence in a current or future legal proceeding.

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For the purposes of this Retention and Disposal Authority, a 'legal proceeding' has the same meaning as the *Evidence (Miscellaneous Provisions) Act 1958*, and includes any civil, criminal or mixed proceeding and any inquiry in which evidence is or may be given before any court or person acting judicially, including a Royal Commission or Board of Inquiry under the *Inquiries Act 2014*.

Under PROS 22/04 Disposal Standard, authorisation to destroy public records is WITHDRAWN and NOT GIVEN (even if specified in an RDA or other authorised disposal instrument) if:

- it is reasonably likely that they will be needed in a current or future legal proceeding. This includes any civil or criminal proceeding or an inquiry where evidence may be given before a court or person acting judicially such as a Royal Commission or Board of Inquiry
- they are required for meeting any Freedom of Information (FOI) applications which are not finalised
- they are required for audits or investigations which are not yet finalised; and/or
- they are subject to disposal freezes applied by government or by the organisation.

If the public office identifies that public records must be retained under other applicable legislation for a period that exceeds the retention period specified under the Standards, then the longer retention period must apply.

Normal Administrative Practice

PROS 22/04 Disposal Standard authorises the destruction of some public records under Normal Administrative Practice (NAP) principles. Low value facilitative records described below are authorised for destruction by *PROS 22/04* under NAP principles:

- working documents, such as notes or calculations, used to assist in the preparation of other records
- minor drafts and transitory documents, where the content is reproduced elsewhere, and the information will not be needed to show how the work has progressed or actions approved
- minor updates of content, such as those in databases, which will not be needed to show actions, decisions, or approvals
- communications for the purpose of making minor arrangements
- duplicate copies

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- periodic backups of records, information, data, software and settings for recovery in case of technical failure and/or catastrophe and are duplicate copies of official business records/data that is held elsewhere on a managed system.

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Transfer of records to Public Record Office Victoria

Contact Public Record Office Victoria for further information on procedures for transferring permanent records to archival custody.

Use of Other Authorities

In applying the disposal sentences set out in this Authority, reference should be made to other current Authorities where applicable. Where there is a conflict between two Authorities (for instance this Authority and the General Retention and Disposal Authority for Records of Common Administrative Functions), consult the Public Record Office Victoria for advice.

Explanation of Authority Headings

Class Number

The class number or entry reference number provides citation and ease of reference.

Description

The description of each record class is specified in this entry. A record class is a group of records that relate to the same activity, function or subject and require the same disposal action.

Status

This entry provides the archival status of each class - either permanent or temporary.

Custody

This entry specifies whether the records are to be retained by the public office or transferred to the Public Record Office Victoria. Permanent records must be managed and transferred in accordance with PROV Standards.

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Establishment of Standard

Pursuant to Section 12 of the *Public Records Act 1973*, I hereby establish these provisions as a Standard (also known as a Retention and Disposal Authority) applying to Public Offices, all. This standard as varied or amended from time to time, shall have effect from the date of issue unless revoked.

Justine Heazlewood, Keeper of Public Records

Date of Issue: 23 April 2007

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
1	COMMITTEES	<p>The activities associated with the management of committees that include elected or appointed management bodies.</p> <p>[For meetings not held by committee, refer to the relevant function and activity the meeting was held to support.]</p> <p>[For records of pecuniary interests, use <i>FINANCIAL MANAGEMENT - Pecuniary interests.</i>]</p> <p>[For records documenting pre-appointment security checks (vetting), use PROS 24/03 RDA for the Human Resources Management Function.]</p> <p>[For records associated with government Inquiries, refer to <i>GOVERNMENT RELATIONS - Inquiries.</i>]</p>		
1.1	Advisory committees	Committees that perform an advisory role relating to the agency's operations and consist of external stakeholders.		
1.1.1		Records relating to the establishment of an advisory committee, including successful appointments and resignations of members.	Permanent	Retain as State archives

This Retention and Disposal Authority **must not be used** for records about child sexual abuse incidents, allegations nor an agency's prevention, identification and response to such incidents and allegations. This includes records of this nature created through an agency's reporting, oversight or regulatory relationships with other agencies.

Instead agencies **must use PROS 19/08** Retention and Disposal Authority for Records of Organisational Response to Child Sexual Abuse Incidents and Allegations.

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMITTEES - Advisory committees</i>				
1.1.2		Records documenting unsuccessful nominations / appointments of members to advisory committees.	Temporary	Destroy 2 years after action completed.
1.1.3		Master set of minutes, agenda, reports, submissions and other meeting papers.	Permanent	Retain as State archives
1.1.4		Duplicate copies of minutes, agenda, reports, submissions and other meeting papers.	Temporary	Destroy after administrative use has concluded.
1.2	Boards	Elected or appointed management bodies established as a requirement of, or under legislation.		
1.2.1		Records relating to the establishment and ongoing membership of the board. This includes the appointment and resignation of board members.	Permanent	Retain as State archives
1.2.2		Records documenting unsuccessful nominations or applications for board membership.	Temporary	Destroy 2 years after action completed.
1.2.3		Master set of minutes, agendas, reports, submissions and other meeting papers.	Permanent	Retain as State archives
1.2.4		Reference or duplicate copies of minutes, agendas, reports, submissions and other meeting papers.	Temporary	Destroy after reference ceases.

This Retention and Disposal Authority **must not be used** for records about child sexual abuse incidents, allegations nor an agency's prevention, identification and response to such incidents and allegations. This includes records of this nature created through an agency's reporting, oversight or regulatory relationships with other agencies.

Instead agencies **must use PROS 19/08** Retention and Disposal Authority for Records of Organisational Response to Child Sexual Abuse Incidents and Allegations.

Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMITTEES - External committees – convened by the agency</i>				
1.3	External committees – convened by the agency	External or inter-agency committees which have been convened by the agency or where the agency provides the Secretariat.		
1.3.1		Records relating to the establishment of the committee, including the appointment of members.	Permanent	Retain as State archives
1.3.2		Master set of minutes, agenda, reports, submissions and other meeting papers.	Permanent	Retain as State archives
1.3.3		Duplicate copies of minutes, agenda, reports, submissions and other meeting papers.	Temporary	Destroy after administrative use has concluded.
1.4	External committees – not convened by the agency	External or inter-agency committees which have not been convened by the agency or where the agency does not provide the Secretariat.		
1.4.1		Records relating to the establishment of the committee, including the appointment of members.	Temporary	Destroy 2 years after action completed.
1.4.2		Copies of minutes, agenda, reports, submissions and other meeting papers.	Temporary	Destroy 2 years after action completed.
1.5	Facilitation of meetings	The activities associated with arranging and facilitating meetings of all boards or committees.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMITTEES - Facilitation of meetings</i>				
1.5.1		Records of a general administrative nature relating to the management of boards and committees, including the preparation and circulation of minutes to members, use of premises where the meetings take place and travel arrangements for members to attend meetings. Includes attendance arrangements, facility arrangements, and expressions of thanks. [For financial records relating to the facilitation of meetings, use <i>FINANCIAL MANAGEMENT - Accounting</i> .]	Temporary	Destroy after administrative use has concluded.
1.6	Internal committees – operational	Internal committees established for operational purposes that do not determine policy direction or strategic planning of agency. Includes working groups, adhoc committees and staff meetings of units or work areas within the agency.		
1.6.1		Master and duplicate copies of minutes, agenda, reports, submissions and other meeting papers.	Temporary	Destroy after administrative use has concluded.
1.7	Internal committees – strategic	Internal committees established to determine policy and for planning purposes, including meetings of senior management within the agency.		
1.7.1		Master set of minutes, agenda and related papers.	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMITTEES - Internal committees – strategic</i>				
1.7.2		Duplicate copies of minutes, agenda and related papers.	Temporary	Destroy after administrative use has concluded.
2	COMMUNITY RELATIONS	The function of establishing relations with the community and raising and maintaining the organisation's broad public profile. Includes marketing, advertising, media liaison, exhibitions, celebrations, ceremonies, speeches, official representation at functions and participation in community activities. Also includes relationships with professional bodies and industry, the management of customer services, handling reactions to those services, customer consultation and feedback.		
2.1	Addresses (presentations)	The activity of giving addresses for community relations purposes. [For records relating to the administrative arrangements for addresses, use <i>COMMUNITY RELATIONS - Celebrations, ceremonies and functions.</i>]		
2.1.1		Final version of addresses made at major public occasions which are a significant event to the business of the agency. May include addresses on policy, strategic direction or new services, products or partnerships of the agency. Includes addresses	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Addresses (presentations)</i>				
		made by a Minister or senior agency officers. Includes addresses that were never presented.		
2.1.2		Final version of addresses delivered or intended to be delivered on the routine promotion of the agency's service or products.	Temporary	Destroy 2 years after last action.
2.1.3		Working papers documenting the development of all addresses.	Temporary	Destroy after reference ceases.
2.2	Celebrations, ceremonies and functions	The activities associated with arranging and managing festivities to honour a particular event. Includes launches, closures, award ceremonies, etc.		
2.2.1		Records relating to the administrative arrangements for events including invitations, acceptances, guest lists, catering, venue. [For associated financial records, use <i>FINANCIAL MANAGEMENT - Accounting</i> .]	Temporary	Destroy 2 years after action completed.
2.3	Complaints	Enquiries and correspondence about complaints received from members of the public or clients of the agency. NOTE: PROS 07/01 does not authorise the disposal of Complaints records of those agencies for which the handling and investigation of complaints is a major function, e.g. Ombudsman Victoria, Office of		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Complaints</i>				
		Police Integrity. An agency specific Retention and Disposal Authority must be used.		
2.3.1		Records documenting complaint processes and procedures.	Temporary	Destroy 7 years after action completed.
2.3.2		Records documenting the receipt and response to complaints which result in changes to agency or government policy or procedures.	Permanent	Retain as State archives
2.3.3		Records documenting the receipt and response to individual complaints which require a detailed response on agency actions, policy or procedures.	Temporary	Destroy 5 years after administrative use has concluded.
2.3.4		Records documenting the receipt and response to individual complaints which require routine responses on agency actions, policy or procedures. Includes standard responses.	Temporary	Destroy 2 years after administrative use has concluded.
2.4	Conferences	<p>The activities involved in arranging conferences or seminars. Includes management of registrations for participants, publicity and evaluations by participants.</p> <p>[For records of staff attending conferences arranged by other organisations, use PROS 24/03 RDA for the Human Resources Management Function.]</p>		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Conferences</i>				
2.4.1		Master copies of transcripts and speeches, proceedings and reports presented at conferences convened by the agency.	Permanent	Retain as State archives
2.4.2		Duplicate copies of transcripts and speeches, proceedings and reports presented at conferences convened by the agency.	Temporary	Destroy after reference ceases.
2.4.3		Records documenting arrangements to hold conferences including program development, arranging speakers, promotion, registration management and venue bookings. Includes draft programs, publicity, invitations, venue accommodation and catering arrangements. [For associated financial records, use <i>FINANCIAL MANAGEMENT - Accounting</i> .]	Temporary	Destroy 2 years after action completed.
2.4.4		Papers presented by agency staff to conferences convened by other organisations and which address the agency's policy, strategic direction or new services, products or partnerships. NOTE: If a paper is presented at multiple conferences, only one version is to be retained as State Archives.	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Conferences</i>				
2.4.5		Papers presented by agency staff to conferences as part of their own professional development.	Temporary	Destroy after reference ceases.
2.5	Customer service	The activities associated with the planning, monitoring and evaluation of customer services provided to clients by the agency. [For the records documenting the development and review of customer service strategies, including customer service charters, use <i>STRATEGIC MANAGEMENT - Customer service strategy.</i>]		
2.5.1		Records documenting the management of specific customer services provided to the public, e.g. managing an enquiry desk, a telephone information service or interpreter service. Includes planning, monitoring and evaluation of services, e.g. carrying out customer surveys.	Temporary	Destroy 2 years after action completed.
2.6	Donations	The activities associated with managing money, items, artefacts or property donated or bequeathed to the agency, or by the agency to charities, etc. Includes managing unsolicited donations. [For records documenting the financial management of donated items, use <i>FINANCIAL MANAGEMENT - Accounting.</i>]		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Donations</i>				
2.6.1		Records documenting the receipt and management of items, artefacts or real property that have a value that impacts on the whole of government or the broader community. Includes approaches for donations or bequests and acknowledgments.	Permanent	Retain as State archives
2.6.2		Records documenting the receipt, management and disposal of donations of money, items, artefacts or objects which do not have value that impacts on the whole of government or the broader community. Includes approaches for donations and acknowledgments.	Temporary	Destroy 7 years after action completed.
2.6.3		Records documenting the refusal of donations. Includes the return of items not accepted by the agency.	Temporary	Destroy 7 years after action completed.
2.6.4		Records documenting donations of money, items and services by the agency to public organisations and groups, including charities.	Temporary	Destroy 7 years after donation was made.
2.7	Enquiries and public reaction	Enquiries and correspondence of appreciation or suggestions from members of the public or clients of the agency. Includes enquiries received in relation to an agency's core functions.		
2.7.1		Records documenting the enquiry process and procedures.	Temporary	Destroy 7 years after action completed.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Enquiries and public reaction</i>				
2.7.2		Records documenting the receipt and response to individual enquiries and public reaction which result in changes to agency or government policy or procedures.	Permanent	Retain as State archives
2.7.3		Records documenting the receipt and response to individual enquiries and public reaction which require a detailed response on agency actions, policy or procedures but do not result in changes to agency or government policy or procedures.	Temporary	Destroy 5 years after administrative use has concluded.
2.7.4		Records documenting the receipt and response to individual enquiries and public reaction which require routine responses on agency actions, policy or procedures. Includes standard responses.	Temporary	Destroy 2 years after administrative use has concluded.
2.8	Exhibitions	The activities associated with using agency material in mounting displays for the purpose of informing or educating the viewer, or promoting the activities, services, projects or programs of the agency.		
2.8.1		Records relating to the design, setting up and ongoing upkeep of exhibitions. Includes drafts, background information, unused material, (e.g. reproductions of photographs, etc.).	Temporary	Destroy 2 years after action completed.
2.8.2		Records relating to the administrative arrangements for the opening and publicising of exhibitions.	Temporary	Destroy 2 years after action completed.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Fundraising</i>				
		[For associated financial records, use <i>FINANCIAL MANAGEMENT - Accounting.</i>]		
2.9	Fundraising	The activities carried out by an agency to receive money or a benefit through donations. [For the management of money received as a result of a fundraising activity, use <i>FINANCIAL MANAGEMENT - Fundraising.</i>]		
2.9.1		The records associated with investigating possible fundraising activities.	Temporary	Destroy 2 years after action completed.
2.9.2		Records associated with the planning and organising of fundraising events by an agency.	Temporary	Destroy 5 years after action completed.
2.10	Grant allocation	Relates to the allocation of financial assistance provided by an agency for various grants and funding programs.		
2.10.1		Summary record of grant applications that identifies the nature of the application and reasons for acceptance or rejection.	Permanent	Retain as State archives
2.10.2		Records documenting grant allocation procedures. Includes selection criteria.	Temporary	Destroy 7 years after action completed.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Grant allocation</i>				
2.10.3		Records of successful applications for grants. Includes records of the ongoing monitoring of the allocated grant.	Temporary	Destroy 7 years after grant activity has ceased.
2.10.4		Records of unsuccessful applications for grants.	Temporary	Destroy 2 years after action completed.
2.11	Grant funding received	The activities associated with the application for and receipt of grants by an agency from a government or non-government source. [For grant applications made <u>to</u> an agency, use <i>COMMUNITY RELATIONS - Grant allocation</i> .]		
2.11.1		Records documenting the identification and selection of grant funding opportunities.	Temporary	Destroy 2 years after action completed.
2.11.2		Records documenting successful applications made by the agency for grant funding received from a government or non-government source.	Temporary	Destroy 7 years after action completed.
2.11.3		Records documenting unsuccessful applications made by the agency for grant funding from a government or non-government source.	Temporary	Destroy 2 years after action completed.
2.12	Greetings	The activities associated with preparing, sending and receiving letters of appreciation or condolence.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Greetings</i>				
2.12.1		Records documenting the preparation, dispatch and receipt of letters of introduction, appreciation, condolence and greeting cards. Includes mailing lists.	Temporary	Destroy after administrative use has concluded.
2.13	Liaison	The activities associated with maintaining regular general contact between the agency and professional associations, professionals in related fields, private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects.		
2.13.1		Records documenting liaison activities undertaken with professional associations, private sector organisations and community groups. Does not include liaison carried out for regulatory purposes.	Temporary	Destroy 5 years after action completed.
2.14	Marketing	The process of analysing and selling products and services. Includes market research, sales forecasting, advertising, media releases, promotion, pricing and product evaluation. [For policy records, see <i>POLICY</i> .] [For records of the drafting of marketing material, use <i>PUBLICATIONS - Drafting</i> .]		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Marketing</i>				
		[For financial records, use <i>FINANCIAL MANAGEMENT - Accounting.</i>]		
2.14.1		Records documenting the planning and final products of major marketing campaigns relating to an agency's activities. Includes activities such as re-branding after agency mergers or restructuring or major awareness campaigns. [For records associated with other facets of an agency restructure, use PROS 24/03 RDA for the Human Resources Management Function.]	Permanent	Retain as State archives
2.14.2		Records documenting the planning and final products of minor marketing campaigns relating to an agency's activities. Includes records covering arrangements for advertising campaigns, public launches and promotional images.	Temporary	Destroy 7 years after action completed.
2.14.3		Records of a facilitative nature used for the preparation of all marketing campaigns and administrative arrangements.	Temporary	Destroy after reference ceases.
2.15	Media relations	The activities associated with establishing a relationship between the media and an agency. Includes cultivating media contacts, coordinating access to the media, authorising and issuing press		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Media relations</i>				
		releases and briefings, and organising media interviews		
2.15.1		Master set of agency media releases.	Permanent	Retain as State archives
2.15.2		Records relating to administrative arrangements with the media. Includes the issuing of media releases, organising interviews, and providing information and assistance to support media coverage of an event or promotion of the agency's services or products.	Temporary	Destroy 2 years after action completed.
2.15.3		Items collected from external media sources. Includes copies of news cuttings and transcripts and items from media monitor services, including those specifically relating to the agency's operations.	Temporary	Destroy after reference ceases.
2.15.4		Media releases received from other agencies.	Temporary	Destroy after reference ceases.
2.16	Security	The activities associated with measures taken to protect people from accidental or intentional harm or embarrassment. [For security issues relating to personnel and occupational health and safety, use PROS 24/03 RDA for the Human Resources Management Function.]		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Security</i>				
		[For security issues relating to property, use <i>PROPERTY MANAGEMENT - Security.</i>]		
2.16.1		Records documenting security arrangements for visits to the agency by dignitaries and the general public.	Temporary	Destroy 7 years after action completed.
2.17	Sponsorship	The activities associated with the provision and receipt of sponsorship for programs and events. Includes financial support and the provision of other resources.		
2.17.1		Records relating to sponsorship received by the agency from another organisation.	Temporary	Destroy 7 years after action completed.
2.17.2		Records relating to sponsorship provided by the agency to another organisation. Includes sponsorship for sporting or cultural events.	Temporary	Destroy 7 years after action completed.
2.18	Visits and tours	The activities involved in arranging visits by other organisations, the public and students to the agency, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by staff to other organisations. [For financial records associated with visits and tours, use <i>FINANCIAL MANAGEMENT - Accounting.</i>]		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>COMMUNITY RELATIONS - Visits and tours</i>				
		[For visits by agency representatives to other government offices and agencies, including overseas visits, use <i>GOVERNMENT RELATIONS - Visits.</i>]		
2.18.1		Records documenting arrangements for visits or tours to the agency.	Temporary	Destroy 2 years after last action.
2.18.2		Records documenting comments or suggestions or expressions of gratitude provided by visitors attending an agency's premises.	Temporary	Destroy after administrative use has concluded.
2.18.3		Security records documenting visitor attendance at an agency's premises.	Temporary	Destroy 7 years after action completed.
2.18.4		Records documenting visits by agency representatives to community organisations to promote the image or services of the agency. Include visit reports.	Temporary	Destroy 2 years after last action.
3	CONTRACTING-OUT	<p>The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant. Also referred to as out-sourcing. Includes the administrative arrangements regarding the engagement of consultants and contractors.</p> <p>NOTE: For the records that result from the actual work or services provided by an external contractor</p>		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>CONTRACTING-OUT - Consultants</i>				
		or consultant, refer to the function and activity to which they specifically relate.		
3.1	Consultants	<p>The activities associated with managing the use of consultants for services by an agency. A consultancy refers to an arrangement where an individual or organisation is engaged:</p> <ul style="list-style-type: none"> • to provide expert analysis and advice that facilitates decision-making; • to perform a specific, one-off task or set of tasks; or • to perform a task involving skills or perform a task involving skills or perspectives that would not normally be expected to reside with the agency. 		
3.1.1		Records relating to the engagement and use of consultants. Includes copies of the specification, quotations, copies of contract and summaries of consultant evaluations.	Temporary	Destroy 7 years after contract expired.
3.2	Contractors	The activities associated with the management of the use of contractors and suppliers for services by an agency.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>CONTRACTING-OUT - Contractors</i>				
		<p>A contractor is an individual or organisation engaged:</p> <ul style="list-style-type: none"> • to provide goods, works or services which implement a decision; • to perform all or part of a new or existing ongoing function to assist an agency carry out its defined activities and operational functions; or • to perform a function involving skills that would normally be expected to reside within an agency but which are not currently available. 		
3.2.1		Records relating to the engagement and use of contractors, suppliers and service providers. Includes registers of contractors and suppliers.	Temporary	Destroy 7 years after terms of the contract expires.
3.3	Contracts	<p>The processes associated with the establishment, maintenance, review and negotiation of agreements and contracts.</p> <p>[For records relating to tendering, use <i>CONTRACTING-OUT - Tendering.</i>]</p>		
3.3.1		Summary records for all contracts managed by an agency. Includes contract registers and systems.	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>CONTRACTING-OUT - Contracts</i>				
3.3.2		Records that document the formulation and execution of contracts for significant government commitments, such as large-scale government infrastructure projects and public private partnerships (PPPs).	Permanent	Retain as State archives
3.3.3		Records of contracts for smaller-scale activities which are under seal (specialty contracts). Includes records associated with the negotiation process, excluding tender records.	Temporary	Destroy 15 years after contract has expired.
3.3.4		Records of contracts for smaller-scale activities which are not under seal (simple contracts). Includes records associated with the negotiation process, excluding tender records.	Temporary	Destroy 7 years after contract has expired.
3.3.5		Records documenting the preliminary drafting process for contracts. Used for internal purposes only and not subject to formal negotiations.	Temporary	Destroy after administrative use has concluded.
3.4	Tendering	The activities involved in receiving and assessing tenders for the supply, sale or purchase of goods and services. Tendering refers to the process of inviting parties to submit an offer by advertisement, followed by evaluation of offers and selecting a successful bidder.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>CONTRACTING-OUT - Tendering</i>				
		[For records relating to the contracts, use <i>CONTRACTING-OUT - Contracts.</i>]		
3.4.1		Records documenting the development and issue of tender documentation. Includes statement of requirements, request for proposals, requests for expressions of interest, request for tender (RFT), draft contracts, specifications and quotations. Also includes records documenting the development of the evaluation and selection criteria for the tender.	Temporary	Destroy 7 years after tender process is completed.
3.4.2		Routine enquiries and arrangements for the advertising of tenders.	Temporary	Destroy 2 years after action completed.
3.4.3		Copies of tender specifications produced by the agency for distribution.	Temporary	Destroy after administrative use has concluded.
3.4.4		Evaluation of tenders received against selection criteria. Includes evaluation reports, recommendations, final reports, and public notices.	Temporary	Destroy 7 years after tender process completed.
3.4.5		Records documenting post-offer negotiations and due diligence checks. Includes successful tender submission records.	Temporary	Destroy 7 years after tender process completed.
3.4.6		Records of unsuccessful tenders or a tender process where there is no suitable bidder, or where the	Temporary	Destroy 2 years after tender process

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>EQUIPMENT & STORES</i>				
		tender process has been discontinued. Includes submissions; notifications of outcomes.		completed or decision made not to continue with the tender.
4	EQUIPMENT & STORES	The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores stocked and used by the agency. Items of equipment include instruments, implements, tools, machines, computers, plant, furniture, furnishings, fixtures and fittings. Stores include chemicals, hardware items, kitchen/cleaning items, medical supplies and stationery.		
4.1	Acquisition	The process of gaining ownership or use of equipment and stores.		
4.1.1		Records documenting the acquisition of equipment and stores where there is no tender or contracting-out process. Includes formal requests for quotations, orders, handover reports, and correspondence relating to the acquisition. [For acquisitions requiring tenders or contracts, see <i>CONTRACTING-OUT</i> .]	Temporary	Destroy 7 years after action completed.
4.1.2		Research into acquisitions of equipment and stores <u>not</u> proceeded with.	Temporary	Destroy after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>EQUIPMENT & STORES - Acquisition</i>				
4.1.3		Information provided by vendors relating to equipment and stores.	Temporary	Destroy after reference ceases.
4.2	Allocation	The process of assigning equipment and stores to employees within an agency.		
4.2.1		Records relating to the allocation of equipment or stores to employees within an agency. Includes records documenting requests for equipment or stores.	Temporary	Destroy 2 years after action completed.
4.3	Delivery	The activities involved in the delivery of equipment and stores.		
4.3.1		Records documenting arrangements for the delivery of equipment and stores to an agency.	Temporary	Destroy after administrative use has concluded.
4.4	Disposal	The process of disposing of equipment and stores no longer required by the agency, by sale, transfer, termination of lease, auction, donation or destruction.		
4.4.1		Records documenting the disposal of equipment and stores leased or owned by the agency.	Temporary	Destroy 7 years after action completed.

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No	Function/Activity	Description	Status	Disposal Action
<i>EQUIPMENT & STORES - Maintenance</i>				
4.5	Maintenance	The activities associated with the upkeep, repair, servicing, modification and preservation of internal/external condition of equipment.		
4.5.1		Records documenting the maintenance of equipment and stores. Includes service and maintenance records.	Temporary	Destroy 7 years after action completed.
4.6	Security	The activities associated with measures taken to protect equipment and stores from accidental or intentional damage or from unauthorised access.		
4.6.1		Records documenting the activities undertaken to protect equipment and stores. Includes investigations into theft or intentional damage and referral of an alleged incident to law enforcement authorities.	Temporary	Destroy 7 years after action completed.
4.6.2		Records documenting lock combinations and/or keys for equipment or plant such as safes and filing cabinets. Includes key registers.	Temporary	Destroy after reference ceases.
4.7	Stocktake	The activities associated with the examination, counting and valuing of goods in the agency with the view to reassessing the need for replacing those goods, and to identify missing items and determine the condition of the existing items.		

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No	Function/Activity	Description	Status	Disposal Action
<i>EQUIPMENT & STORES - Stocktake</i>				
4.7.1		Records documenting the stocktake of equipment and stores.	Temporary	Destroy 2 years after action completed.
4.8	Storage	The activities associated with the storing of equipment and stores.		
4.8.1		Records documenting the storage of equipment and stores (excluding hazardous materials) within an agency. Includes records documenting location management and stock control.	Temporary	Destroy after reference ceases.
4.8.2		Records documenting the storage of hazardous equipment and stores within an agency. Includes records documenting location management and stock control and identifying substance properties and details of their condition. [For the environmental monitoring of hazardous substances, use PROS 24/03 RDA for the Human Resources Management Function]	Temporary	Destroy 10 years after action completed.
4.9	Usage	The activities involved in using equipment and stores.		
4.9.1		Instructions for the use of equipment and stores. Includes equipment manuals and operating instructions.	Temporary	Destroy after equipment or stores disposed of.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT</i>				
5	FINANCIAL MANAGEMENT	The function of managing the agency's financial resources. Includes establishing, operating and maintaining accounting systems, controls and procedures, financial planning, framing budgets and budget submissions, obtaining grants, managing funds in the form of allocations from the Consolidated Fund and revenue from charging, trading and investments. Also includes the monitoring and analysis of assets to assist the delivery of economic and social services to government, industry and the community.		
5.1	Accounting	The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the agency.		
5.1.1		Principal accounting records and associated supporting records related to managing the agency's revenue and expenditure. Includes sales and purchase invoices, receipts, orders for the payment of money, bills of exchange, cheques, promissory notes, credit notices, petty cash records, cash books, journals, ledgers and other records of prime entry.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Accounting</i>				
5.1.2		Records documenting the establishment of agency bank accounts. Includes records that document the closure of the bank account.	Temporary	Destroy 7 years after account has been closed.
5.1.3		Records documenting the management of banking activities. Includes deposit records, bank statements, bank reconciliation statements, investment and dividend statements, and records documenting use of credit cards.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.
5.1.4		Records documenting the management of debt recovery.	Temporary	Destroy 7 years after action completed.
5.1.5		Records documenting the management of incidental benefits received by agency personnel, e.g. frequent flyer points.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.
5.1.6		Records documenting the administrative process in handling money and financial records, i.e. records which do not document agency revenue and expenditure.	Temporary	Destroy 2 years after completion of the financial year in which the record was created.
5.1.7		Records documenting the management of surplus, obsolete or damaged accountable forms.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Accounting</i>				
5.1.8		Records documenting the agency's chart of accounts.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.
5.1.9		Records containing cardholder data captured as part of an electronic financial transaction including information printed, processed, transmitted or stored in any form on a payment card.	Temporary	Destroy 3 months after last business, legal and/or regulatory action.
5.1.10		Records containing sensitive cardholder authentication data captured as part of an electronic financial transaction.	Temporary	Destroy after action completed.
5.2	Asset register	The activities involved in recording in a subsidiary ledger all fixed assets owned by the agency. Includes the date of purchase, depreciation expense, written down value as well as stocktaking and auditing notations.		
5.2.1		Summary record listing an agency's assets such as an asset register.	Permanent	Retain as State archives
5.2.2		Records documenting asset valuation and asset management processes, including requests for inclusion on the asset register.	Temporary	Destroy 7 years after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Asset register</i>				
5.2.3		Records associated with listing and preparing lists of items and assets in the possession of the agency.	Temporary	Destroy 2 years after administrative use has concluded.
5.3	Audit	The activities associated with officially checking financial records to ensure they have been kept and maintained in accordance with agreed or legislated standards.		
5.3.1		Final report of an internal or external (e.g. undertaken by the Victorian Auditor-General's Office or a private accountancy firm) financial audit that results in major or significant changes to agency practices.	Temporary	Destroy 10 years after audit is completed.
5.3.2		Final report of an internal or external (e.g. undertaken the Victorian Auditor-General's Office or a private accountancy firm) financial audit that results in no changes or only minor or routine changes to agency practices.	Temporary	Destroy 5 years after audit is completed.
5.3.3		Records documenting the planning and conduct of internal and external financial audits.	Temporary	Destroy 2 years after audit is completed.
5.4	Authorisation	The process of delegating power to authorise a financial activity.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Authorisation</i>				
5.4.1		Delegations of power to agency staff to authorise financial activities and transactions (e.g. delegation to approve expenditure or appointment of an officer to countersign cheques).	Temporary	Destroy 7 years after delegation is superseded or cancelled.
5.5	Budgeting	The process of planning the use of expected income and expenditure over a specified period.		
5.5.1		Budget estimates and associated records prepared for external approval (e.g. approval from the parent department of an agency or Ministerial approval).	Temporary	Destroy 7 years after completion of the financial year in which the record was created.
5.5.2		Budget estimates produced for internal use by the agency.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.
5.5.3		Budget estimates produced for adhoc funding submissions (i.e. funding requests that fall outside core budget) made to the Expenditure Review Committee (ERC) of Cabinet or equivalent committees.	Temporary	Destroy 7 years after completion of the financial year in which the record was created.
5.5.4		Background records used for the production of whole of agency budget estimates.	Temporary	Destroy 5 years after completion of the financial year in which the record was created.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Budgeting</i>				
5.5.5		Records documenting the input by individual departments within an agency to the whole of agency budget estimates.	Temporary	Destroy 2 years after completion of the financial year in which the record was created.
5.5.6		Records documenting spending progress or revenue collection against allocations within budget estimates.	Temporary	Destroy 2 years after completion of the financial year in which the record was created.
5.6	Financial statements	The process of compiling annual financial statements showing income and expenditure for the current financial year and assets and liabilities at the end of the year, with comparative figures for the previous financial year, as required by the <i>Financial Management Act 1994</i> . [For reports that refer to financial expenditure of public funds, see <i>REPORTING</i> .]		
5.6.1		Annual financial statements and associated background documentation. Includes balance sheets, operating statements, cash flow statements and accompanying notes.	Permanent	Retain as State archives
5.6.2		Interim financial statements including balance sheets and operating statements. Includes mid-year and quarterly financial reporting statements.	Temporary	Destroy 7 years after completion of the

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Financial statements</i>				
				financial year in which the record was created.
5.6.3		Working papers and calculations relating to the preparation of all financial statements.	Temporary	Destroy 5 years after action completed.
5.7	Fraud	The activities associated with the disclosure of fraud. Includes fraudulent activities carried out by those within and outside of the agency. [For records documenting the misconduct by employees, use PROS 24/03 RDA for the Human Resources Management Function.]		
5.7.1		Records documenting the identification of major instances of fraud that were resolved internally.	Temporary	Destroy 15 years after administrative use has concluded.
5.7.2		Records documenting the identification of minor instances of fraud that were resolved internally.	Temporary	Destroy 7 years after administrative use has concluded.
5.7.3		Records documenting the identification of <u>major</u> instances of fraud that resulted in liaison with external bodies. Includes the report and investigation of fraudulent activities and records documenting liaison with law enforcement authorities.	Temporary	Destroy 15 years after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Fraud</i>				
5.7.4		Records documenting the identification of <u>minor</u> instances of fraud that resulted in liaison with external bodies. Includes the report and investigation of fraudulent activities and records documenting liaison with law enforcement authorities.	Temporary	Destroy 7 years after administrative use has concluded.
5.8	Fundraising	The activities carried out by an agency to receive money or a benefit through donations. [For records relating to the administrative arrangements of fundraising activities, use <i>COMMUNITY RELATIONS - Fundraising</i>].		
5.8.1		Records documenting the receipt and disbursement of money received through fundraising events and activities.	Temporary	Destroy 7 years after administrative use has concluded.
5.9	Pecuniary interests	Activities associated with the disclosure of pecuniary interests of employees or members of boards or committees.		
5.9.1		Records documenting an individual's company, trust and property holdings as well as any other pecuniary interests. Includes pecuniary returns made upon appointment as well as any regular updates.	Temporary	Destroy 3 years after an individual ceases to hold office.

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No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Procedures</i>				
5.10	Procedures	Standard methods for financial management operations laid down by an agency according to formulated policy. [For all procedures other than those relating to the Financial Management function, use <i>POLICY - Procedures.</i>]		
5.10.1		Master set of agency manuals, handbooks, directives etc. detailing procedures supporting the financial management function.	Permanent	Retain as State archives
5.10.2		Records documenting the development of agency procedures supporting the financial management function.	Temporary	Destroy 2 years after administrative use has concluded.
5.11	Salaries	The process of managing the payment of salaries to personnel.		
5.11.1		Records documenting the processing of payment of salaries to personnel. [For records such as group certificates, tax declaration forms, and overtime use PROS 24/03 RDA for the Human Resources Management Function.]	Temporary	Destroy 7 years after completion of the financial year in which the record was created.

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No	Function/Activity	Description	Status	Disposal Action
<i>FINANCIAL MANAGEMENT - Taxation</i>				
5.12	Taxation	The activities involved with administering taxation matters. [For taxation records specific to an employee, such as group certificates and tax declaration forms, use PROS 24/03 RDA for the Human Resources Management Function.]		
5.12.1		Records documenting the taxation matters of an agency e.g. administration of Goods & Services Tax (GST).	Temporary	Destroy 5 years after completion of the financial year in which the record was created.
5.12.2		Records relating to organisational income taxation records including records relating to the payment of payroll taxes.	Temporary	Destroy 5 years after completion of the financial year in which the record was created.
5.13	Loans Management	The activity of acquiring financial loans to the agency for the provision of services and the financing of agency programs. Includes the administration of borrowing by the agency.		
5.13.1		Records relating to the borrowing of money by an agency.	Temporary	Destroy 7 years after finalisation of the loan.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FLEET MANAGEMENT</i>				
		Includes, loan agreements, repayment records, interest rate agreements and other associated records.		
6	FLEET MANAGEMENT	The function of acquiring, managing, maintaining, repairing and disposing of vehicles. Vehicles are any means of conveyance owned or used by the organisation to transport people or items.		
6.1	Accidents	The activities involved in dealing with mishaps causing damage to vehicles. [For records of accidents where personal injuries have occurred, use PROS 24/03 RDA for the Human Resources Management Function.]		
6.1.1		Records relating to accidents in which vehicles used or maintained by the agency are involved.	Temporary	Destroy 7 years after vehicle is disposed of.
6.2	Acquisition	The process of gaining ownership or use of vehicles required in the conduct of business through purchase.		
6.2.1		Records relating to the acquisition of vehicles via purchase.	Temporary	Destroy 7 years after sale or disposal of the vehicle.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FLEET MANAGEMENT - Allowances</i>				
6.3	Allowances	Payments to individuals relating to the use of vehicles. [For employee entitlements use PROS 24/03 RDA for the Human Resources Management Function]		
6.4	Disposal	The process of disposing of vehicles no longer required by the organisation, by sale, transfer, termination of lease, auction, donation or destruction.		
6.4.1		Records relating to the disposal of vehicles via sale, transfer, auction etc.	Temporary	Destroy 7 years after sale or disposal of the vehicle.
6.5	Infringements	The activities associated with handling breaches of rules. Includes driving or traffic infringements		
6.5.1		Records relating to traffic infringements involving vehicles used or maintained by the agency.	Temporary	Destroy 7 years after action completed.
6.6	Insurance	The process of taking out insurance policies to cover loss or damage to vehicles and to cover the agency against damage to another organisation's property.		
6.6.1		Vehicle insurance policies.	Temporary	Destroy 7 years after policy expires.

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No	Function/Activity	Description	Status	Disposal Action
<i>FLEET MANAGEMENT - Insurance</i>				
6.6.2		Records relating to annual renewal of insurance policies.	Temporary	Destroy 2 years after action completed.
6.6.3		Records documenting insurance claims.	Temporary	Destroy 7 years after action completed.
6.7	Leasing	The activities involved in leasing vehicles from another organisation. Includes the process of hiring vehicles by chartering, which is a contractual arrangement.		
6.7.1		Records documenting the acquisition, administration and management of leased vehicles. Includes fuel billing reports and vehicle exception reports.	Temporary	Destroy 7 years after lease expires or is terminated.
6.7.2		Records documenting the administration of short term rental vehicles.	Temporary	Destroy 7 years after action completed.
6.8	Maintenance	The activities associated with the upkeep, repair, servicing, modification, registration and preservation of vehicles.		
6.8.1		Records relating to repairs and ongoing maintenance of vehicles. Includes servicing records.	Temporary	Destroy 2 years after action completed.
6.8.2		Records documenting the registration of vehicles. Includes inspections and renewals.	Temporary	Destroy after registration is renewed

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>FLEET MANAGEMENT - Usage</i>				
				or when administrative use has concluded.
6.9	Usage	The activities involved in monitoring the use of vehicles.		
6.9.1		Vehicle booking records.	Temporary	Destroy 2 years after administrative use has concluded.
6.9.2		Vehicle running sheets/log books. Includes records generated by global positioning systems.	Temporary	Destroy 2 years after administrative use has concluded.
7	GOVERNMENT RELATIONS	The function of administering the formal relationship between the agency and wider government. Includes the agency's relationship with Ministers and members of Parliament and the political processes of government; liaison with bodies carrying out investigations and participating in formal inquiries and investigations, and relationships with other State and Territory Governments, the Commonwealth or overseas Governments.		
7.1	Addresses (presentations)	The activity of giving addresses and presentations at government occasions.		

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Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Advice</i>				
		[Use <i>COMMUNITY RELATIONS</i> Addresses - (presentations).]		
7.2	Advice	The activities associated with the offering of opinions by or to the agency as to an action or judgement.		
7.2.1		Advice provided by the agency to the portfolio Minister and government agencies on controversial public issues shown to have far-reaching social, economic and Statewide implications. Includes records documenting the development of the advice.	Permanent	Retain as State archives
7.2.2		Advice provided by the agency to the portfolio Minister and government agencies on matters which have not been shown to have far reaching impact on the social, economic and national standing of the State. Includes records documenting the development of the advice.	Temporary	Destroy 5 years after administrative use has concluded.
7.3	Appointments	The activities associated with the nomination, appointment or resignation of individuals or groups as official representatives to government bodies. [For records relating to appointments to boards or committees, see <i>COMMITTEES</i> .] [For records relating to the appointment of individuals or groups to the position of Occupational		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Appointments</i>				
		Health & Safety representative, use PROS 24/03 RDA for the Human Resources Management Function.] [For records of the financial interests of appointees, use <i>FINANCIAL MANAGEMENT - Pecuniary interests.</i>] [For records documenting pre-appointment security checks (vetting), use PROS 24/03 RDA for the Human Resources Management Function.]		
7.3.1		Records documenting successful nominations for statutory positions which are administered by the agency. Includes the associated appointment, resignation and termination records.	Permanent	Retain as State archives
7.3.2		Records documenting unsuccessful nominations for statutory positions which are administered by the agency.	Temporary	Destroy 2 years after action completed.
7.4	Cabinet business management	The activities associated with the preparation and submission of advice and reports to Cabinet and Cabinet Committees. This class refers to the Cabinet-in-Confidence records created or received by agencies.		

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No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Cabinet business management</i>				
		NOTE: The records of the Cabinet Secretariat are covered by the <i>Retention and Disposal Authority for Records of the Department of Premier and Cabinet</i> .		
7.4.1		Preparation of Cabinet-in-Confidence papers including submissions and supporting attachments, background materials, drafts, comments received, briefing notes, memos and speaking notices.	Permanent	Retain as State Archives
7.4.2		Duplicate copies of Cabinet-in-Confidence agendas, minutes, briefs, submissions, decision extracts and any other documents distributed to Departments by the Cabinet Office for reference purposes pertaining to Cabinet and Cabinet Committee meetings and to which reference has concluded prior to commencement of the caretaker period. NOTE: Original set of cabinet-in-confidence records are held by the Cabinet Secretariat. These records are covered by the <i>Retention and Disposal Authority for Records of the Department of Premier and Cabinet</i> .	Temporary	Destroy in accordance with advice issued by the Cabinet Office.
7.4.3		Duplicate copies of Cabinet-in-Confidence agendas, minutes, briefs, submissions, decision extracts and any other documents distributed to Departments by the Cabinet Office for reference purposes pertaining to Cabinet and Cabinet Committee meetings and	Temporary	Destroy in accordance with advice issued by the Cabinet Office.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Cabinet business management</i>				
		<p>which are still required for reference purposes upon commencement of the caretaker period.</p> <p>NOTE: Original set of cabinet-in-confidence records are held by the Cabinet Secretariat. These records are covered by the <i>Retention and Disposal Authority for Records of the Department of Premier and Cabinet</i>.</p>		
7.4.4		Notes made by agency officials attending Cabinet or Cabinet committee meetings to give advice and reference to these records has concluded prior to commencement of the caretaker period.	Temporary	Destroy in accordance with advice issued by the Cabinet Office.
7.4.5		Notes made by agency officials attending Cabinet or Cabinet committee meetings to give advice and reference to these notes is still required for reference purposes upon commencement of the caretaker period.	Temporary	Destroy in accordance with advice issued by the Cabinet Office.
7.5	Inquiries	The activities associated with liaising with bodies carrying out inquiries, and participating in them. Inquiries are investigations carried out by persons or bodies that have been empowered to inquire and report on a subject. These include inquiries carried out by Royal Commissions, Parliament and the Ombudsman. Includes the agency's participation in		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Inquiries</i>				
		the inquiry by providing evidence in the form of records, submissions or staff.		
7.5.1		Records of continuing value documenting an agency's contribution and involvement in an inquiry directly related to its functions. Includes agency statements and submissions, responses to final reports, and transcripts of oral evidence given by agency officers. Includes working and supporting papers.	Permanent	Retain as State archives
7.5.2		Duplicate copies of submissions to an inquiry held by the agency for reference until the work of the inquiry is complete.	Temporary	Destroy after the inquiry's final report is tabled or submitted.
7.5.3		Records documenting the implementation by the agency of the recommendations that were made as part of an inquiry.	Permanent	Retain as State archives
7.5.4		Records documenting inquiries with no direct relation to the agency's core function and where the agency made a minor contribution.	Temporary	Destroy 5 years after final report of inquiry is released.
7.5.5		Duplicate copies of records documenting inquiries with no direct relation to the agency's core function and where the agency made a minor contribution.	Temporary	Destroy after the inquiry's final report is tabled or submitted.
7.5.6		Records documenting inquiries with no direct relation to the agency's core function and where the agency	Temporary	Destroy after reference ceases.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Joint ventures</i>				
		provided no contribution nor had any involvement in the inquiry.		
7.6	Joint ventures	The activities involved in managing joint operations between departments, either within the agency or with other agencies, or with the interstate governments where there is a contract, joint contribution of funds and / or time. Includes ventures with the private sector and co-research or collaboration between departments or agencies. Includes the development of Memorandums of Understanding. [For records relating to the management of other contracts, see <i>CONTRACTING-OUT</i> .]		
7.6.1		Final signed version of joint venture agreements or Memorandums of Understanding of major significance to the State such as large-scale government infrastructure projects and public private partnerships (PPPs). Includes records documenting the development of these agreements.	Permanent	Retain as State archives
7.6.2		Final versions of joint venture agreements or Memorandums of Understanding of small-scale significance to the State. Includes records documenting the development of these agreements.	Temporary	Destroy 7 years after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Legislation</i>				
7.7	Legislation	The process of making laws. Includes Acts, Bills and subsections to Acts, and amendments to each.		
7.7.1		Records documenting the development of Regulatory Impact Statements that directly relate to an agency's functions.	Permanent	Retain as State archives
7.7.2		Records relating to the development of legislation and regulations concerning the operations and functions of the agency. Includes drafting instructions, draft legislation, regulation and amendments, submissions to the Minister, reports, comments received from other agencies and any other papers containing substantial input from the agency.	Permanent	Retain as State archives
7.7.3		Records documenting detailed responses or submissions to requests for comment on legislation other than that directly relating to the agency's functions.	Permanent	Retain as State archives
7.7.4		Records documenting a minor response to a request for comment on legislation other than that directly relating to the agency's functions.	Temporary	Destroy 5 years after administrative use has concluded.
7.7.5		Records documenting a "nil" response to a request for comment on legislation other than that directly relating to the agency's functions.	Temporary	Destroy after reference ceases.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Representations (includes parliamentary questions)</i>				
7.8	Representations (includes parliamentary questions)	The activities involved in preparing responses to questions raised in Parliament by Members on behalf of their constituents. Also includes preparation of responses to questions directed to Ministers from individuals, community groups or industry bodies that are not raised in Parliament. [For enquiries that are managed by agencies directly, use <i>COMMUNITY RELATIONS - Enquiries and public reaction.</i>]		
7.8.1		Records documenting responses to questions raised in Parliament which originated from peak industry bodies, community groups and individuals concerning issues of a contentious nature which are of major significance to the agency and/or the community at large. Includes records documenting the approach and any associated petitions.	Permanent	Retain as State archives
7.8.2		Records documenting responses to questions raised in Parliament which originated from peak industry bodies, community groups and individuals which are of a routine nature concerning issues which are of no major significance to the agency and/or the community at large. Includes any associated petitions and the final response provided.	Temporary	Destroy 5 years after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Representations (includes parliamentary questions)</i>				
7.8.3		Records documenting approaches received by the Minister from peak industry bodies, community groups and individuals concerning issues of a contentious nature which are of major significance to the agency and/or the community at large. Includes any associated petitions and the final response provided.	Permanent	Retain as State archives
7.8.4		Records documenting approaches received by the Minister from the public of a routine nature concerning issues which are of no major significance to the agency and/or the community at large. Includes any associated petitions and the final response provided.	Temporary	Destroy 5 years after administrative use has concluded.
7.8.5		Requests for and copies of information supplied to other agencies to answer parliamentary questions.	Temporary	Destroy 2 years after administrative use has concluded.
7.8.6		Records documenting Questions on Notice and Possible Parliamentary Questions (PPQs) that were considered to be contentious or that relate to a core function of the agency.	Permanent	Retain as State archives
7.8.7		Records documenting Questions on Notice and Possible Parliamentary Questions (PPQs) that were not considered to be particularly contentious and are of a routine nature.	Temporary	Destroy 5 years after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Submissions</i>				
7.9	Submissions	The preparation and submission of a formal statement (e.g. reports, statistics, etc.) supporting a case or opinion held by an agency to an internal or external body.		
7.9.1		Submissions (other than Cabinet submissions) made to the Premier, Minister, and government bodies on issues directly relating to the agency's functions, concerning controversial issues with far-reaching social, economic and interstate implications relating to the functional responsibilities of the agency. Includes records documenting the development of submissions.	Permanent	Retain as State archives
7.9.2		Submissions (other than Cabinet submissions) made to Premier, Minister, and government bodies on issues directly relating to agency's functions, concerning other matters with no far-reaching impact on the social, economic and interstate standing of the State. Includes submissions concerning administrative matters. Includes records documenting the development of submissions.	Temporary	Destroy 10 years after administrative use has concluded.
7.10	Visits	The activities involved in arranging visits by the Premier, Ministers and agency representatives within the State, interstate or overseas.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>GOVERNMENT RELATIONS - Visits</i>				
		[For records of visits to an agency, use <i>COMMUNITY RELATIONS - Visits and tours.</i>] [For records of visits to community organisations, use <i>COMMUNITY RELATIONS - Visits and tours.</i>]		
7.10.1		Official reports of fully funded overseas fact-finding tours by the Premier, Ministers, Members of Parliament or agency representatives that relate to the core functions of the agency.	Permanent	Retain as State archives
7.10.2		Official reports of overseas tours by agency representatives that do not specifically relate to the core functions of the agency.	Temporary	Destroy 7 years after administrative use has concluded.
7.10.3		Records documenting the arrangement of visits by the Premier, Ministers and agency representatives both within Australia and overseas. Includes invitations, travel and accommodation arrangements, itineraries and programs, letters of thanks.	Temporary	Destroy 7 years after administrative use has concluded.
7.10.4		Records documenting visits by agency representatives to other government agencies in Australia. Includes reports on the visit.	Temporary	Destroy 7 years after administrative use has concluded.
8	INDUSTRIAL RELATIONS	This function has been replaced. Please see PROS 24/03 RDA for Records of the Human Resources		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT</i>				
		Management Function: Function 3 Industrial Relations.		
9	INFORMATION MANAGEMENT	<p>The function of managing the agency's information resources. Includes systems used for creating, capturing, registering, indexing, storing, retrieving and disposing of records and the developing of strategies to manage records. Also includes the acquisition, control and disposal of library and other information products and services.</p> <p>Includes the handling of issues under legislation such as the <i>Information Privacy Act 2000</i> and <i>Freedom of Information Act 1982</i>.</p> <p>[For records associated with the management of website content, see <i>PUBLICATIONS</i>.]</p>		
9.1	Acquisition	The process of gaining ownership or use of information resources or the provision of information services through purchases.		
9.1.1		Records documenting the acquisition of library, information and records management materials and/or services where there is no tender or contracting-out process. Includes orders and subscriptions.	Temporary	Destroy 7 years after action completed.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Audit</i>				
		[For records documenting acquisitions carried out by contract, use <i>CONTRACTING-OUT - Contracts.</i>] [For records documenting information resources acquired by donations, use <i>COMMUNITY RELATIONS - Donations.</i>]		
9.2	Audit	The activities associated with officially checking records to ensure they have been kept and maintained in accordance with agreed or legislated standards. [For records associated with audits carried out on information technology systems, use <i>TECHNOLOGY AND TELECOMMUNICATIONS - Audit.</i>]		
9.2.1		Records associated with audits carried out to check compliance (and to investigate any breaches) with recordkeeping policies, procedures and systems.	Temporary	Destroy 7 years after administrative use has concluded.
9.2.2		Records associated with the routine checking and review of the locations of files, documents and other information resources. Includes file census.	Temporary	Destroy after administrative use has concluded.
9.3	Conservation	The activities involved in the preservation, protection, maintenance, restoration and enhancement of information resources and artefacts.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Conservation</i>				
9.3.1		Records documenting routine preservation activities undertaken on agency records and, library and information resources both electronic and paper copy. Also includes preservation on artefacts and objects.	Temporary	Destroy after reference ceases.
9.3.2		Records documenting very specific or prescribed preservation activities undertaken on records, library and information resources.	Temporary	Destroy after resource is disposed of.
9.4	Control	The activities associated with creating and maintaining control of information. Includes classification, indexing, registration, forms design, etc. to ensure maximum control over records and recordkeeping systems. Also includes control mechanisms for other information resources and systems.		
9.4.1		Master control records for agency recordkeeping systems. Includes registers, indexes, configuration manuals and records management systems.	Permanent	Retain as State archives
9.4.2		Master copy of file classification systems or an agency's business classification schemes. Includes records management procedures such as document titling protocols.	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Control</i>				
9.4.3		Control records documenting library collections, e.g. library catalogue.	Temporary	Destroy after collection is disposed of.
9.5	Customer service	The activities associated with the planning, monitoring and evaluation of services provided to customers by the agency.		
9.5.1		Records documenting the day to day operations of a library or a records management unit enquiry desk.	Temporary	Destroy after reference ceases.
9.6	Disposal	The activities involved in the destruction or transfer of records to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into storage. [For the records associated with the disposal of library collections, use <i>EQUIPMENT & STORES - Disposal</i> .]		
9.6.1		Records documenting internal agency business rules or procedures regarding the use of retention and disposal authorities.	Temporary	Destroy after administrative use has concluded.
9.6.2		Agency copies of ongoing records retention and disposal authorities issued by Public Record Office Victoria (PROV).	Temporary	Destroy after reference ceases.

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No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Disposal</i>				
9.6.3		Agency copies of ad hoc disposal authorisation issued by Public Record Office Victoria (PROV).	Temporary	Destroy after records covered by the authority have been disposed of.
9.6.4		Records documenting public records that have been disposed of by means of an authorised disposal authority or by normal administrative practice.	Temporary	Destroy 30 years after administrative use has concluded.
9.6.5		Records documenting the transfer of permanent records to Public Record Office Victoria (PROV).	Temporary	Destroy after administrative use has concluded.
9.6.6		Records relating to the determination of access conditions relating to records transferred to Public Record Office Victoria (PROV).	Temporary	Destroy 5 years after access arrangements have been finalised.
9.6.7		Records documenting the actions carried out in relation to the physical destruction of public records.	Temporary	Destroy after administrative use has concluded.
9.7	Freedom of Information (FOI)	The activities involved in handling requests for access to records and documents under the <i>Freedom of Information Act 1982</i> . Includes requests which are granted and those that are refused. [For FOI requests that lead to litigation, use <i>LEGAL SERVICES - Litigation.</i>]		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Freedom of Information (FOI)</i>				
9.7.1		Records documenting FOI requests that set a precedent in how FOI requests are handled. Also includes FOI requests which lead to a change in how the agency operates (e.g. changes to the agency's policy or processes).	Permanent	Retain as State archives
9.7.2		Records documenting FOI requests that require a detailed response from the agency.	Temporary	Destroy 5 years after action concluded.
9.7.3		Records documenting FOI requests which are routine or which are not proceeded with (e.g. where requests are withdrawn, lapse because of non-payment of application fees or are referred to another agency).	Temporary	Destroy 2 years after action concluded.
9.8	Mail management	Records documenting the receipt and dispatch of agency mail.		
9.8.1		Records relating to bulk mail-outs.	Temporary	Destroy after administrative use has concluded.
9.8.2		Records relating to mail dispatch and receipt. Includes postal delivery receipts and courier dockets.	Temporary	Destroy after administrative use has concluded.
9.9	Privacy	The activities involved in ensuring agencies meet obligations under the <i>Information Privacy Act 2000</i> .		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Privacy</i>				
		[For records associated with development of agency policies for information privacy, use <i>POLICY - Agency-wide policy</i> .]		
9.9.1		The records associated with complaints made concerning breaches of the <i>Information Privacy Act 2000</i> that are <u>not</u> resolved by an agency and have been referred to the Office of the Victorian Privacy Commissioner.	Temporary	Destroy 15 years after action concluded.
9.9.2		The records associated with complaints made concerning breaches to the <i>Information Privacy Act 2000</i> that are resolved internally by an agency.	Temporary	Destroy 7 years after action concluded.
9.9.3		Records associated with requests made in relation to access to or correction of personal information held by an agency.	Temporary	Destroy after administrative use has concluded.
9.10	Security	The activities associated with measures taken to protect information from accidental or intentional damage or from unauthorised access. [For records associated with security for information technology systems, use <i>TECHNOLOGY & TELECOMMUNICATIONS - Security</i> .]		
9.10.1		Records relating to the physical security arrangements for records management systems.	Temporary	Destroy 5 years after action concluded.

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Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>INFORMATION MANAGEMENT - Security</i>				
9.10.2		Records associated with establishing and assigning security levels and caveats within records management systems.	Temporary	Destroy 5 years after action concluded.
9.11	Storage	The activities involved in storing information resources.		
9.11.1		Records relating to the use of on-site storage areas.	Temporary	Destroy 2 years after action concluded.
9.11.2		Records relating to the selection and use of off-site storage areas.	Temporary	Destroy 7 years after administrative use has concluded.
9.11.3		Records relating to security arrangements for records storage areas.	Temporary	Destroy 2 years after action concluded.
9.11.4		Records relating to the retrieval of records held by PROV and secondary storage providers including both physical and online retrieval.	Temporary	Destroy after administrative use has concluded.
10	LEGAL SERVICES	The function of providing legal services to the agency. Includes the interpretation and provision of advice to the agency regarding legal matters, the drawing up of legal agreements and the handling of legal actions and disputes. Also includes legal advice received from in-house consultants and external sources including the Victorian Government Solicitor.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>LEGAL SERVICES - Advice</i>				
		<p>Includes the handling of issues under the <i>Whistleblowers Protection Act</i>.</p> <p>[For records documenting the development of legislation, use <i>GOVERNMENT RELATIONS - Legislation</i>.]</p> <p>[For records documenting the handling of issues relating to Freedom of Information, use <i>INFORMATION MANAGEMENT - Freedom of Information (FOI)</i>.]</p> <p>[For records documenting the handling of issues relating to information privacy, use <i>INFORMATION MANAGEMENT - Privacy</i>.]</p>		
10.1	Advice	<p>The activities associated with the offering of opinions by or to the agency as to an action or judgement. Includes the process of advising.</p> <p>[For legal research not carried out by a legal service provider, use <i>LEGAL SERVICES - Research</i>.]</p>		
10.1.1		<p>Records documenting requests for and legal advice received from an internal or external legal service provider relating to: matters of major public interest or controversy, Cabinet matters, State security, agency-wide industrial issues, new or amended agency legislation and interpretation of an agency's</p>	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>LEGAL SERVICES - Advice</i>				
		own and other legislation. Includes advice from the Victorian Government Solicitor, and related records.		
10.1.2		Records documenting requests for and legal advice received from an internal or external legal provider that relate to matters of minor public interest or controversy; do not relate to Cabinet matters, State security nor agency-wide industrial issues; and do not relate to new or amended agency legislation nor interpretation of an agency's own or other legislation. Includes advice from the Victorian Government Solicitor and related records.	Temporary	Destroy 15 years after administrative use has concluded.
10.2	Compensation	The activities of providing compensation to personnel and visitors for damage to property where such damage is claimed as the agency's responsibility. [For claims relating to death or personal injury, use PROS 24/03 RDA for Records of the Human Resources Management Function]		
10.2.1		Records of claims for damage to property made by agency employees or members of the public.	Temporary	Destroy 7 years after claim resolved.
10.3	Intellectual property	The activities involved in managing the agency's intellectual property, both published and unpublished, and the use of material held by the agency in which the another party owns the intellectual property. Includes copyright, design,		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>LEGAL SERVICES - Intellectual property</i>				
		patents and trademarks, royalties and matters of confidentiality such as trade secrets that are not available to the public under FOI legislation.		
10.3.1		Records documenting the establishment and management of intellectual property either held or administered by the agency.	Temporary	Destroy 7 years after intellectual property lapses.
10.3.2		Records documenting unsuccessful or abandoned attempts to establish intellectual property rights.	Temporary	Destroy 2 years after administrative use has concluded.
10.4	Litigation	<p>The activities involved in managing lawsuits or legal proceedings between the agency and other parties in a court or other tribunal. Includes briefs for counsel, copies of documents required by or lodged with a court, consultation with the Attorney-General's department and other agencies, and records documenting compliance with court instructions, e.g. subpoenas and discovery orders.</p> <p>[For compensation claims relating to personal injury or death, use PROS 24/03 RDA for Records of the Human Resources Management Function.]</p> <p>[For compensation claims relating to damage to property, use <i>LEGAL SERVICES - Compensation</i>.]</p>		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>LEGAL SERVICES - Litigation</i>				
10.4.1		Records documenting litigation matters where legal precedents are set or lead to a change in agency or government-wide policies, or lead to the establishment or abolition of new government agencies.	Permanent	Retain as State archives
10.4.2		Records documenting litigation matters that do not set legal precedent, nor lead to a change in any agency or government-wide policies, nor lead to the establishment or abolition of new government agencies.	Temporary	Destroy 15 years after litigation has concluded.
10.4.3		Records created and received during legal discovery processes. Includes subpoenas and discovery orders.	Temporary	Destroy 7 years after action completed.
10.5	Research	The activities involved in investigating or enquiring into a legal or legislative subject or area of interest in order to discover facts, principles etc. Used to support the development of projects, standards, guidelines etc. and the business activities of the agency in general.		
10.5.1		Records documenting detailed research carried out to support the legal services function. Includes research of legislation and regulations. [For advice from a legal service provider, use <i>LEGAL SERVICES - Advice.</i>]	Temporary	Destroy 5 years after administrative use has concluded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>LEGAL SERVICES - Research</i>				
10.5.2		Records documenting routine research carried out to support the legal services function.	Temporary	Destroy after reference ceases.
10.6	Whistleblower's protection	The activities associated with the handling of disclosures about officers of the agency under the <i>Whistleblowers Protection Act 2001</i> .		
10.6.1		Investigations into disclosures made under the <i>Whistleblowers Protection Act 2001</i> .	Permanent	Retain as State archives
11	OCCUPATIONAL HEALTH & SAFETY (OH&S)	<p>This function has been replaced. Please see PROS 24/03 RDA for Records of the Human Resources Management Function: Function 2 Health, Wellbeing and Safety.</p> <p>[For committees established to investigate and advise on health and safety issues in the workplace, use <i>COMMITTEES - Internal committees operational</i> OR <i>COMMITTEES - Internal committees strategic</i>.]</p> <p>[For OH&S matters that result in litigation, use <i>LEGAL SERVICES - Litigation</i>.]</p>		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PERSONNEL MANAGEMENT</i>				
12	PERSONNEL MANAGEMENT	This function has been replaced. Please see PROS 24/03 RDA for Records of the Human Resources Management Function: Function 1 Employment Management and Function 5 Volunteer Management.		
13	POLICY	The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making or as the basis from which the agency's operating procedures are determined.		
13.1	Agency-wide policy	The formulation of policies which have an impact across the agency.		
13.1.1		Records documenting a policy, including its formulation, or functional activities, strategic planning and management matters affecting the whole agency.	Permanent	Retain as State archives
13.1.2		Records relating to the formulation of agency policy on administrative matters which prescribes the way the agency should operate. Includes policies relating to personnel, finance etc.	Permanent	Retain as State archives
13.1.3		Records relating to the formulation of policies that refer to administrative functions of minor significance.	Temporary	Destroy after superseded or updated.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>POLICY - Government-wide policy</i>				
13.2	Government-wide policy	The formulation of policies which impact on the whole of the Victorian Government.		
13.2.1		Records relating to the development of government-wide policy where the agency has played a leading role in the development of the policy.	Permanent	Retain as State archives
13.2.2		Records of government-wide policies where the agency has not played a leading role in the development of the policy. For example, agency versions of policies set by other agencies such as the Victorian Purchasing Board etc.	Temporary	Destroy after superseded or updated.
13.3	Procedures	Standard methods of operating laid down by an agency according to formulated policy.		
13.3.1		Records of an agency's procedures including manuals, handbooks, directives etc.	Temporary	Destroy 7 years after procedures are superseded.
13.3.2		Records documenting the development of agency procedures.	Temporary	Destroy 2 years after procedures are superseded.
14	PROPERTY MANAGEMENT	The function of managing land and working, storage, living or recreational space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting, and disposing of land,		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Accidents, damage and illegal entry</i>				
		facilities and premises. Includes buildings and land allotments owned, rented, leased or managed by the agency. Also includes the removal of pollutants and waste.		
14.1	Accidents, damage and illegal entry	The activities associated with managing accidents, damage and illegal entry to agency property.		
14.1.1		Records of accidents and damage occurring to property.	Temporary	Destroy 7 years after action is completed.
14.1.2		Records relating to illegal entry. Includes incidents of illegal entry resulting in damage and/or theft.	Temporary	Destroy 7 years after action is completed.
14.2	Acquisition	The process of gaining ownership or use of property through purchases, donation, bequest or other forms of acquisition.		
14.2.1		Records relating to the acquisition of property. Includes legal documents relating to a purchase / sale; particulars of sale documents; board of survey; licenses & rental revision; tender documents; conditions of contracts; certificates of approval. [For records relating to the leasing of property, use <i>PROPERTY MANAGEMENT - Leasing.</i>]	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Acquisition</i>				
14.2.2		Deeds and certificates for property owned by the agency.	Temporary	Transfer to new owner when property is disposed of.
14.2.3		Records documenting the negotiations for properties where the acquisition was not proceeded with.	Temporary	Destroy 7 years after purchase is suspended.
14.3	Conservation	The activities involved in the preservation, protection, restoration and enhancement of properties, including buildings and land.		
14.3.1		Records documenting the activities involved in the preservation, protection, restoration and enhancement of properties.	Temporary	Destroy after property is disposed of.
14.3.2		Records documenting the activities involved in the preservation, protection, restoration, enhancement, fitting out and renovation of properties owned leased or managed by the agency that are identified as having local significance within a municipal heritage study. Excludes records of properties identified on the World Heritage Register, the Register of the National Estate, or the Victorian Heritage Register.	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Construction and renovation</i>				
14.4	Construction and renovation	<p>The process of making or building a structure. Includes renovations that affect the overall structure of the property.</p> <p>[For refurbishments of properties which do not affect its overall structure, use <i>PROPERTY MANAGEMENT - Fit-outs.</i>]</p> <p>[For renovations of properties identified as having local heritage significance see 14.3.2]</p>		
14.4.1		Records documenting construction and renovation activities carried out on <u>government owned</u> properties. Includes "as built" construction plans.	Permanent	Retain as State archives
14.4.2		Records documenting construction and renovation activities carried out on non-government owned properties. Includes "as built" construction plans.	Temporary	Destroy 15 years after property is no longer occupied.
14.4.3		Records documenting construction and renovation activities for properties which are not proceeded with.	Temporary	Destroy 7 years after decision to suspend construction or renovation activities.
14.5	Disposal	The process of disposing of property no longer required by the agency, by sale, transfer, auction, donation or destruction.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Disposal</i>				
14.5.1		Records of the disposal of property.	Permanent	Retain as State archives
14.6	Fit-outs	<p>The process of refurbishing a workplace that does not affect the overall structure of the property. Includes painting, floor coverings, furnishings, furniture, partitions and wall fittings and equipment.</p> <p>[For changes to property that affect structure, use <i>PROPERTY MANAGEMENT - Construction & Renovation</i>].</p> <p>[For refurbishments of properties identified as having local heritage significance see 14.3.2]</p>		
14.6.1		<p>Records documenting fit-outs of properties.</p> <p>[For fit-outs where asbestos was present, use class 14.6.2.]</p>	Temporary	Destroy 15 years after fit-out is completed.
14.6.2		Records documenting fit-outs of properties where asbestos was present.	Temporary	Destroy 100 years after property is disposed of.
14.7	Installation	Activities involved in placing equipment in position and connecting and adjusting it for use.		
14.7.1		Records documenting installation of equipment (e.g. heating, plumbing, air-conditioning, security)	Temporary	Destroy after replacement of equipment.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Installation</i>				
		equipment and cabling) in properties. Includes arranging installations and location details.		
14.7.2		Records documenting the installation of equipment intended for exclusive or extensive use by the public.	Temporary	Destroy 25 years after removal or replacement of equipment.
14.8	Insurance	The process of taking out insurance policies to cover loss or damage to property and to cover the agency against damage to another organisation's property as well as injury to members of the public visiting agency property or using agency facilities.		
14.8.1		Records of insurance policies including property insurance and public liability insurance.	Temporary	Destroy 7 years after policy expires.
14.8.2		Records relating to annual renewal of insurance policies.	Temporary	Destroy 2 years after action completed.
14.8.3		Records documenting insurance claims.	Temporary	Destroy 7 years after action completed.
14.9	Leasing	The activities involved in leasing accommodation, premises or real estate from another organisation.		
14.9.1		Records documenting the leasing by the agency of property belonging to another organisation. Includes space and accommodation assessments;	Temporary	Destroy 7 years after lease expires or is terminated.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Leasing</i>				
		negotiations; cost-benefit analysis; assessments; signed leases.		
14.9.2		Records documenting ongoing administrative matters regarding the leasing arrangements for a property.	Temporary	Destroy 2 years after action completed.
14.10	Leasing-out	The activities involved in leasing-out accommodation, premises or real estate to another organisation or person for a specified period and agreed price. Includes the formal documentation setting out conditions, rights, responsibilities etc. of both parties. Also includes sub-leasing.		
14.10.1		Records relating to the leasing-out of premises belonging to the agency. Includes negotiations and signed leases.	Temporary	Destroy 7 years after expiry of lease.
14.10.2		Records documenting ongoing administrative matters regarding the leasing arrangements for a property.	Temporary	Destroy 2 years after action completed.
14.11	Maintenance	The activities associated with the upkeep and repair of internal / external conditions of premises.		
14.11.1		Records documenting routine upkeep, repair and maintenance activities, e.g. cleaning, painting, grounds maintenance and electrical maintenance.	Temporary	Destroy 2 years after action completed.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Maintenance</i>				
		For records of structural maintenance on property or equipment intended for exclusive or extensive use by the public see 14.11.9		
14.11.2		Records documenting the maintenance, repair and testing of cooling tower systems. Includes operating and maintenance manuals, test results and service log sheets for cooling towers.	Temporary	Destroy 7 years after action completed.
14.11.3		Records documenting major repairs made to properties after a disaster, e.g. fire, floods etc.	Temporary	Destroy after property is disposed of.
14.11.4		Records documenting the identification and restoration of contaminated land.	Permanent	Retain as State archives
14.11.5		Records documenting the removal and disposal of hazardous materials (including asbestos) from the fabric of the building.	Temporary	Destroy 100 years after removal of hazardous materials.
14.11.6		Records documenting the removal, storage and disposal of hazardous waste and materials that are <u>not</u> from the fabric of the building, e.g. chemicals or pesticides.	Temporary	Destroy 30 years after removal of hazardous waste.
14.11.7		Hazardous substance register (including asbestos register) identifying substance properties and details of their condition.	Temporary	Destroy 100 years after last entry.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Maintenance</i>				
14.11.8		Records documenting the removal of non-toxic waste.	Temporary	Destroy 2 years after action completed.
14.11.9		Records documenting the structural maintenance of property or equipment intended for exclusive or extensive use by the public. For records of routine maintenance on property or equipment, see 14.11.1.	Temporary	Destroy 7 years after action completed.
14.12	Moving	The process of relocation of an agency, business unit or workgroup.		
14.12.1		Records relating to the moving of business activities from one property to another. Includes inventories, costings, and removalist records.	Temporary	Destroy 7 years after action completed.
14.13	Pest control	The activities associated with the controlling, destroying or repelling of pests.		
14.13.1		Records relating to pest and infestation control.	Temporary	Destroy 7 years after action completed.
14.14	Planning	The process of formulating ways in which objectives can be achieved.		

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No	Function/Activity	Description	Status	Disposal Action
<i>PROPERTY MANAGEMENT - Planning</i>				
14.14.1		Records documenting the devising of disaster plans for disasters such as fire and floods to property both leased and owned.	Temporary	Destroy after plan superseded.
14.14.2		Records documenting the devising of plans (other than disaster plans) relating to property management. Includes plans devised for the management of worksites during renovation and other maintenance activities.	Temporary	Destroy 5 years after action completed.
14.15	Security	The activities associated with measures taken to protect property from accidental or intentional damage or from unauthorised access.		
14.15.1		Records documenting property guarding, surveillance and patrol operations. Includes records of electronic security systems, security reports and rosters.	Temporary	Destroy 7 years after action completed.
14.15.2		Surveillance camera footage.	Temporary	Destroy after administrative use has concluded.
15	PUBLICATIONS	The function of having works, irrespective of format, issued for sale or distribution internally or to the public. Includes websites and intranet sites. The function includes drafting, manual or electronic		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PUBLICATIONS - Agency photographs and films</i>				
		production (design, layout, typesetting, printing etc.), marketing and supply of publications by the agency		
15.1	Agency photographs and films	The activities associated with the creation and production of commissioned photographs and moving images on agency activities.		
15.1.1		Master set of commissioned photographs and moving images on agency activities.	Permanent	Retain as State Archives, Transfer to PROV
15.1.2		Duplicate copies of commissioned photographs and moving images on agency activities.	Temporary	Destroy after administrative use has concluded.
15.2	Agency publications	The activities associated with the production and dissemination of an agency's primary publications. These publications usually contain a variety of detailed information and can be published in any format. NOTE: Content from an agency's website or intranet should be sentenced according to the function and activity that the content documents.		
15.2.1		One copy of each of the agency's primary publications (including web publications but excluding websites) which have not been lodged with	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PUBLICATIONS - Agency publications</i>				
		the State Library of Victoria in compliance with the <i>Libraries Act 1988</i> .		
15.2.2		Duplicate copies of the agency's primary publications which have not been lodged with the State Library of Victoria in compliance with the <i>Libraries Act 1988</i> .	Temporary	Destroy after administrative use has concluded.
15.2.3		Copies of the agency's primary publications which have been lodged with the State Library of Victoria in compliance with the <i>Libraries Act 1988</i> .	Temporary	Destroy after administrative use has concluded.
15.2.4		Copies of publications intended to publicise or promote agency activities. Includes pamphlets and brochures.	Temporary	Destroy after administrative use has concluded.
15.3	Copyright (intellectual property)	The activities involved in managing the agency's copyright (intellectual property), both published and unpublished, and the use of material held by the agency in which another party owns the copyright (intellectual property). [For records of establishing intellectual property, use <i>LEGAL SERVICES - Intellectual property</i> .]		
15.3.1		Requests from the public and other agencies for permission to reproduce either published or unpublished material in which the agency retains copyright.	Temporary	Destroy 7 years after action completed.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PUBLICATIONS - Copyright (intellectual property)</i>				
15.3.2		Applications made by the agency to reproduce published material held under copyright by another agency, organisation or individual.	Temporary	Destroy 7 years after action completed.
15.3.3		Records documenting infringements or breaches of the agency's copyright which do not proceed to litigation. Includes investigations, notifications of breaches and negotiations. [For cases that proceed to litigation, use <i>LEGAL SERVICES - Litigation.</i>]	Temporary	Destroy 7 years after action completed.
15.4	Corporate style	The activity of compiling and administering guidelines on the consistency in written style, graphic design etc. within the agency's documents. Includes designing logos, letterhead, stationery, forms, and publications etc. that incorporate the corporate image of the agency. [For the promotion of the corporate image of the agency, use <i>COMMUNITY RELATIONS - Marketing.</i>]		
15.4.1		Agency style manuals.	Temporary	Destroy after superseded.
15.4.2		Records documenting the development, approval, implementation and administration of designs for	Temporary	Destroy after superseded.

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PUBLICATIONS - Corporate style</i>				
		agency logos, letterhead, stationery and publications incorporating the corporate image. [For the design of marketing campaigns, use <i>COMMUNITY RELATIONS - Marketing.</i>]		
15.4.3		Records documenting the development, approval, implementation and administration of designs for agency forms.	Temporary	Destroy after administrative use has concluded.
15.4.4		Records documenting rejected designs regarding corporate style.	Temporary	Destroy after reference ceases.
15.5	Distribution	The activities associated with disseminating publications through sales, deliveries, or other customer services.		
15.5.1		Records documenting the distribution activity for agency publications. Includes records of the monitoring of distribution, stock lists and address lists.	Temporary	Destroy after administrative use has concluded.
15.6	Drafting	The activities associated with preparing preliminary drafts or outlines of reports, articles, etc prior to publication.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PUBLICATIONS - Drafting</i>				
15.6.1		Records relating to all aspects of the drafting of agency publications. Includes drafts, background information, and unused material (such as duplicate photographs etc.). [For other photographs, use <i>PUBLICATIONS - Agency photographs and films.</i>]	Temporary	Destroy after administrative use has concluded.
15.7	Production	The process involved in turning material into a publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.		
15.7.1		Records documenting the production process.	Temporary	Destroy 3 years after administrative use has concluded.
15.7.2		Records documenting changes to content on an agency's website. Includes records of the approval process.	Temporary	Destroy after administrative use has concluded.
15.8	Stocktake	The activities associated with the examination, counting and valuing of goods in the agency with the view to reassessing the need for replacing those goods, and to identify missing items and determine the condition of the existing items.		

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>PUBLICATIONS - Stocktake</i>				
15.8.1		Records documenting stocktakes of the agency's publications. Includes recommendations for the reprint of a publication.	Temporary	Destroy after administrative use has concluded.
16	REPORTING	The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies), and to provide formal statements or findings of the results of an examination or investigation. [For financial statements and reports, use <i>FINANCIAL MANAGEMENT - Financial Statements.</i>]		
16.1	Administrative reporting	The activities associated with the reporting on an agency's administrative functions.		
16.1.1		Reports produced about the day to day internal administrative functions of an agency.	Temporary	Destroy 5 years after administrative use has concluded.
16.2	Annual reporting	The activities that produce an agency's annual report to Parliament.		
16.2.1		Annual reports.	Permanent	Retain as State archives

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Retention and Disposal Authority for Records of Common Administrative Functions

Authority number: PROS 07/01 VAR 8

No	Function/Activity	Description	Status	Disposal Action
<i>REPORTING - Functional reporting</i>				
16.3	Functional reporting	Reports of an agency's functions that detail performance against objectives, including legislated objectives. [For reports on overseas visits by agency representatives, use <i>GOVERNMENT RELATIONS - Visits.</i>]		
16.3.1		Consolidated reports on functional activities which are not reproduced elsewhere.	Permanent	Retain as State archives
16.3.2		Reports on functional activities which are reproduced elsewhere, e.g. in the annual report.	Temporary	Destroy 7 years after action completed.
16.4	Input to agency reports	Activities that support the preparation of all agency reports.		
16.4.1		Background information and reference materials supplied for reports and summaries.	Temporary	Destroy after administrative use has concluded.
17	STAFF DEVELOPMENT	This function has been replaced. Please see PROS 24/03 RDA for Records of the Human Resources Management Function: Function 4 Staff Development.		
18	STRATEGIC MANAGEMENT	The function of applying broad systematic management planning for the organisation.		

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No	Function/Activity	Description	Status	Disposal Action
<i>STRATEGIC MANAGEMENT - Customer service strategy</i>				
18.1	Customer service strategy	The activities associated with the planning, monitoring and evaluation of services provided to customers by the agency. [For other activities associated with customer service, use <i>COMMUNITY RELATIONS - Customer service.</i>]		
18.1.1		Records documenting the development of customer service strategies. Includes strategies and service charters.	Temporary	Destroy 5 years after strategies are superseded.
18.1.2		Records documenting the evaluation, monitoring and reporting of customer service provided.	Temporary	Destroy 5 years after administrative use has concluded.
18.2	Planning	The process of formulating ways in which objectives can be achieved. Includes determination of services, needs, and solutions to those needs. [For strategic or corporate reports, use <i>REPORTING - Functional reporting.</i>]		
18.2.1		Final version of agency-wide strategic or corporate plans.	Permanent	Retain as State archives

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No	Function/Activity	Description	Status	Disposal Action
<i>STRATEGIC MANAGEMENT - Planning</i>				
		[For agency-wide staff development plans, use PROS 24/03 RDA for Records of the Human Resources Management Function.]		
18.2.2		Duplicate copies of agency-wide strategic or corporate plans.	Temporary	Destroy after administrative use has concluded.
18.2.3		Final version of business unit level work plans. [For business unit staff development plans, use PROS 24/03 RDA for Records of the Human Resources Management Function.]	Temporary	Destroy 5 years after action completed.
18.2.4		Records documenting the development of all strategic, corporate or business unit level work plans.	Temporary	Destroy after administrative use has concluded.
18.3	Project management	The management of knowledge, skills, tools and techniques in order to meet the requirements of a project. NOTE: For the records of specific projects, use the disposal class that relates to the function and activity carried out by that project. [For records of project boards and committees, see <i>COMMITTEES.</i>]		

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No	Function/Activity	Description	Status	Disposal Action
<i>STRATEGIC MANAGEMENT - Project management</i>				
18.3.1		Summary documentation of projects. Includes project registers.	Permanent	Retain as State archives
18.3.2		Records documenting the development of a project management methodology and systems for reporting and monitoring of projects.	Temporary	Destroy after administrative use has concluded.
18.4	Restructuring	The reassessment of the activities, goals and structure of an agency. Includes consideration of the number of staff, their position descriptions, equipment, and other resources required by an agency.		
18.4.1		Records detailing significant reviews and restructures of an entire agency or major functional sections of it. Includes records documenting the establishment and development of a new agency structure.	Permanent	Retain as State archives
18.4.2		Records detailing only minor reviews and restructures affecting only particular sections of the agency and having little effect on the overall functioning of the agency.	Temporary	Destroy 10 years after administrative use has concluded.
18.4.3		Records documenting the administrative arrangements that result from agency restructures. Includes transfer of equipment, corporate files etc.	Temporary	Destroy 7 years after administrative use has concluded.

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No	Function/Activity	Description	Status	Disposal Action
<i>STRATEGIC MANAGEMENT - Risk management</i>				
18.5	Risk management	<p>The process involving the identification of risks, the likelihood and consequences of those risks and the implementation of appropriate practices and procedures to treat the risks.</p> <p>[For risk management activities relating to OH&S, use PROS 24/03 RDA for Records of the Human Resources Management Function.]</p>		
18.5.1		Records documenting risk management including each stage of the process, risk assessments, treatment schedules and action plans.	Temporary	Destroy 7 years after administrative use has concluded.
19	TECHNOLOGY & TELECOMMUNICATIONS	<p>The function of developing or acquiring, testing and implementing applications, systems and databases to support the business needs of the agency, and to capture, store, retrieve, transfer, communicate and disseminate information through automated systems. Includes the evaluation of software and hardware and the acquisition, leasing, licensing and disposal of systems. Also includes communication network systems such as video conferencing, voice mail and email and technical aspects of the Internet, Intranets and websites.</p> <p>[For financial records associated with the technology & telecommunications function, use <i>FINANCIAL MANAGEMENT - Accounting</i>.]</p>		

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No	Function/Activity	Description	Status	Disposal Action
<i>TECHNOLOGY & TELECOMMUNICATIONS - Acquisition</i>				
19.1	Acquisition	The activity of gaining ownership or use of technology and telecommunications through purchasing.		
19.1.1		Records documenting the acquisition of technology and telecommunication equipment, goods and services where there is no tender or contract process. Includes formal requests for quotes and orders. [For acquisitions carried out by contract, use <i>CONTRACTING-OUT - Contracts.</i>]	Temporary	Destroy 7 years after action completed.
19.1.2		Records documenting acquisitions that did not proceed for technology and telecommunication equipment, goods and services.	Temporary	Destroy after administrative use has concluded.
19.1.3		Information provided by technology and telecommunications vendors relating to products and services.	Temporary	Destroy after reference ceases.
19.2	Allocation	The process of assigning technological resources to employees or organisational units.		
19.2.1		Records documenting the allocation of software to individuals or organisational units.	Temporary	Destroy 2 years after administrative use has concluded.

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No	Function/Activity	Description	Status	Disposal Action
<i>TECHNOLOGY & TELECOMMUNICATIONS - Allocation</i>				
19.2.2		Records documenting the allocation of phone numbers and system usernames to individuals or organisational units.	Temporary	Destroy 2 years after administrative use has concluded.
19.3	Application development	The activities associated with developing software and programming codes, including ongoing developments, to run business applications. Includes specifications, testing, pilots, prototyping and metadata requirements.		
19.3.1		Records documenting the development and modification (including ongoing management) of specific applications which go into production. Includes feasibility studies; pilot studies; final versions of all system documentation, user and technical manuals; business rules; user requirements; system specifications; final sign-off.	Temporary	Destroy 7 years after system becomes defunct.
19.3.2		Records documenting the development and modification of specific applications which do not go into production.	Temporary	Destroy 2 years after last action.
19.3.3		Records documenting testing activities. Includes testing strategies, result forms, and test reports.	Temporary	Destroy 7 years after action completed.
19.4	Audit	The activities associated with officially checking systems to ensure they have been kept and maintained in accordance with agreed or legislated		

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No	Function/Activity	Description	Status	Disposal Action
<i>TECHNOLOGY & TELECOMMUNICATIONS - Audit</i>				
		standards and that any records contained in them correctly record the events, processes and business of an agency in a specified period.		
19.4.1		Records documenting audit activities carried out on systems.	Temporary	Destroy 7 years after action completed.
19.5	Control	The activities associated with creating, maintaining and evaluating control mechanisms.		
19.5.1		Records documenting the development of control mechanisms (e.g. authenticity and version control).	Temporary	Destroy 5 years after mechanism is superseded.
19.5.2		System logs which are used to show a history of access or change to data. Includes system access logs; system change logs; audit trails. [For internet access logs, use class 19.5.6]	Temporary	Destroy after agency's own requirements have ceased.
19.5.3		System logs which are not used to show a history of access or changes to data. Includes backup logs, tapes.	Temporary	Destroy after reference ceases.
19.5.4		Records documenting the allocation and maintenance of metadata in electronic systems.	Temporary	Destroy after reference ceases.

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<i>TECHNOLOGY & TELECOMMUNICATIONS - Control</i>				
19.5.5		Records documenting the maintenance of email address lists (internal and external) and / or telephone lists.	Temporary	Destroy after reference ceases.
19.5.6		Internet access logs.	Temporary	Destroy 2 years after last action.
19.6	Customer service	The activities associated with the planning, monitoring and evaluation of services provided to customers.		
19.6.1		Records relating to the provision of a help desk service. Includes: <ul style="list-style-type: none"> • minor maintenance and advice • technical assistance to an individual • requests to reset passwords • requests to recover data from backup tapes; and • ad-hoc requests for information from databases. 	Temporary	Destroy 2 years after administrative use has concluded.

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No	Function/Activity	Description	Status	Disposal Action
<i>TECHNOLOGY & TELECOMMUNICATIONS - Data administration</i>				
19.7	Data administration	The activities associated with maintaining and using the data that is held in a system, either automated or manual.		
19.7.1		Records relating to the migration of data between electronic systems and from one electronic medium to another. Includes strategies for the migration and quality assurance checks to confirm accuracy of the migration process.	Temporary	Destroy 1 year after migration.
19.8	Database management	The activities associated with the building, prototyping and testing of databases. Includes the management of user rules, passwords and monitoring usage and response times.		
19.8.1		Records documenting database management. Includes requests for changes to schemas, views and configuration management.	Temporary	Destroy 7 years after action completed.
19.9	Disposal	The process of disposing of technology and telecommunications equipment no longer required by the agency, by sale, transfer, termination of lease, auction, donation or destruction. [For records relating to the disposal of hardware, use <i>EQUIPMENT & STORES - Disposal.</i>]		

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No	Function/Activity	Description	Status	Disposal Action
<i>TECHNOLOGY & TELECOMMUNICATIONS - Evaluation</i>				
19.10	Evaluation	The process of determining the suitability of potential or existing programs, items of equipment, systems or services in relation to meeting the needs of a given situation. Includes systems analysis and ongoing monitoring.		
19.10.1		Records documenting analysis of business processes. Includes systems and business processes analysis.	Temporary	Destroy 7 years after action completed.
19.10.2		Records documenting the evaluation of potential or existing technology and telecommunications services and systems. Includes investigations into the feasibility of contracting out technology and telecommunications activities.	Temporary	Destroy 7 years after action completed.
19.11	Implementation and installation	The activities associated with carrying out or putting into action databases, applications or systems. Includes the installation of equipment and facilities.		
19.11.1		Records relating to the implementation, installation, configuration and relocation of technology and telecommunications equipment and facilities. [For associated training and education materials, use PROS 24/03 RDA for Records of the Human Resources Management Function.]	Temporary	Destroy 5 years after action completed.

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No	Function/Activity	Description	Status	Disposal Action
<i>TECHNOLOGY & TELECOMMUNICATIONS - Inspections</i>				
19.12	Inspections	The process of official examinations of equipment and items to ensure compliance with agreed standards and objectives.		
19.12.1		Records documenting the routine inspection of technology and telecommunications systems and facilities, i.e. to ensure that unauthorised software or equipment is not being used.	Temporary	Destroy 2 years after action completed.
19.13	Leasing	The activities involved in leasing technology and telecommunications items and equipment from another organisation.		
19.13.1		Records documenting the administration and management of leased technology and telecommunications equipment. Includes reports received from leasing companies.	Temporary	Destroy 7 years after lease expires or is terminated.
19.14	Licenses	The activities associated with giving permission or establishing a formal relationship to use software or a system.		
19.14.1		Records documenting the acquisition of licenses for software and systems from vendors. Includes negotiations relating to the terms and conditions of the license.	Temporary	Destroy 7 years after license has expired.

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<i>TECHNOLOGY & TELECOMMUNICATIONS - Licenses</i>				
19.14.2		Records documenting the monitoring and renegotiations of license agreements. Includes responses to any licensing infringements.	Temporary	Destroy 7 years after license has expired.
19.15	Maintenance	The activities associated with the upkeep, repair and servicing of technology and telecommunications assets.		
19.15.1		Records relating to the maintenance and upkeep of systems.	Temporary	Destroy 2 years after action completed.
19.16	Security	The measures taken to protect equipment or information from accidental or intentional damage or from unauthorised access. Includes responses to any security breaches.		
19.16.1		Records relating to the security of systems.	Temporary	Destroy 7 years after system has closed.
19.16.2		Records associated with the setting up of remote access to agency networks at individual's homes.	Temporary	Destroy 2 years after action completed.
19.16.3		Records associated with the use of filters in systems to control SPAM and viruses.	Temporary	Destroy 7 years after system has closed.
19.16.4		Records associated with the setting and management of digital signatures.	Temporary	Destroy after no longer required for verification purposes on the

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<i>TECHNOLOGY & TELECOMMUNICATIONS - Security</i>				
				electronic records the digital signature has been used on.

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