

Australian Capital Territory

# **Territory Records (Records Disposal Schedule – Disability, Housing and Community Services Records) Approval 2005 (No 1)**

**Notifiable instrument NI2005—94**

made under the

**Territory Records Act 2002, s 19 (Approval of schedules for the disposal of records)**

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## **1. Name of Instrument**

This instrument is the Territory Records (Records Disposal Schedule – Disability, Housing and Community Services Records) Approval 2005 (No 1)

## **2. Approval**

I approve the Records Disposal Schedule – Disability, Housing and Community Services Records.

## **3. Commencement**

This instrument commences on the day after notification.

David Wardle  
Director of Territory Records  
23 February 2005



*Records Disposal Schedule  
Disability, Housing and Community Services  
Records*

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## INTRODUCTION

The Records Disposal Schedule – Disability, Housing and Community Services Records is the official authority for the disposal of records relating to Disability, Housing and Community Services Records.

It is one of a series of Records Disposal Schedules authorised by the Director of Territory Records in accordance with the provisions of the *Territory Records Act 2002*. It is to be used in conjunction with the Territory Administrative Records Disposal Schedule (TARDiS).

## PURPOSE

The purpose of this Records Disposal Schedule is to provide for the authorised disposal of Disability, Housing and Community Services Records created or maintained by ACT Government agencies.

## SCOPE

This Records Disposal Schedule applies to all ACT Government agencies as defined in the *Territory Records Act 2002*.

It applies to records in any format, including electronic records.

## AUTHORITY

The Director of Territory Records, in consultation with stakeholders and the Territory Records Advisory Council, has approved this Records Disposal Schedule for use. The Schedule does not take effect until it has been incorporated into an agency's Records Management Program that has been signed off by the Principal Officer of the agency.

Even so, officers using this Records Disposal Schedule should apply it with caution. They should be aware that the authorisations for disposal are given in terms of the *Territory Records Act 2002* only. Officers must not dispose of records in contravention of this Records Disposal Schedule or other requirements.

This Records Disposal Schedule will remain in force until a new schedule supersedes it or the Director of Territory Records withdraws it from use.

## STRUCTURE AND RELATIONSHIP TO THE TERRITORY VERSION OF KEYWORD AAA

A Records Disposal Schedule generally specifies retention periods. That is, how long records are to be retained by the agency before being destroyed or retained as Territory Archives.

Retention periods set down in this schedule are minimum periods only and an agency may keep records for a longer period if considered necessary for business requirements. Reasons for longer retention could include legal requirements, administrative need or agency directives. **An agency must not dispose of any records where it is aware of possible legal action for which the records may be required as evidence.**

The Records Disposal Schedule – Disability, Housing and Community Services Records has a hierarchical structure that reflects its arrangement according to functions and activities, rather than by



subject, and its close relationship to the Territory Version of Keyword AAA. The Records Disposal Schedule is designed to be applicable to all Disability, Housing and Community Services Records regardless of titling conventions used, so that records, which have not been titled using the terminology represented by this Records Disposal Schedule, may still be sentenced with relative ease.

### **TERRITORY VERSION OF KEYWORD AAA**

The Territory Version of Keyword AAA is the general administrative thesaurus produced by the Territory Records Office. The structure and terms used in this Records Disposal Schedule are closely related to those used in the Territory Version of Keyword AAA, which is based on functional analysis of business activity. This methodology (i.e. the analysis of business activity) produces a hierarchical model of an organisation's business activity. The hierarchical model also represents a classification scheme for the records that documents functions, activities and transactions.

The disposal actions listed in this Records Disposal Schedule were determined through the process of appraisal in accordance with Territory Records Office Standard for Records Management No.2 - Appraisal. Appraisal is based upon the same type of analysis of business activity employed in the classification scheme used in the Territory Version of Keyword AAA. Essentially, appraisal involves attaching record retention periods and disposal decisions (and even records creation requirements and rules) to the same classification scheme.

## **GUIDELINES FOR USE**

### **COVERAGE OF AUTHORITY**

The Records Disposal Schedule – Disability, Housing and Community Services Records covers all Disability, Housing and Community Services records.  
is intended to cover most Disability, Housing and Community Services records common to all ACT Government agencies;  
is intended to be used in conjunction with TARDiS;  
specifies the minimum period records should be kept (retention periods);  
specifies whether, upon the expiry of the retention periods, the records may be destroyed or are required as Territory Archives; and  
is applicable to records created and maintained in any format, including electronic or formats such as microfiche.

### **Layout of the schedule**

This Records Disposal Schedule begins with an introduction incorporating definitions and the business classification scheme. Then each of the functions and activity disposal sets or ‘disposal classes’ relating to the functions are described. These are followed by a composite list of classes designated ‘Retain as Territory Archives’. The functions and activity disposal sets show the following details:

#### **Function**

This is the broad level business function and is displayed in bold capital letters at the top of each page. It is the highest level in the business classification scheme. It is followed by the scope note, which provides definitions of the function and a collective view of the business activities that make that function unique.

#### **Activity**

Activities are the processes or operations that make up the business function. They are set in bold and italics below the function statement. This is the second level of the business classification scheme. The scope of the activity encompasses all of the transactions that take place in relation to this activity. Activities can relate to many functions with the scope notes covering all of these relationships (eg the activity ‘Policy’ is linked to all of the functions. However, each function and activity set represents a unique unit.

#### **Entry No.**

This is the disposal class number allocated based on the function and activity set and the class number of the record. The barcode is the same as the Entry No. and may be used in an automated recordkeeping system.

#### **Description of Records**

This is the description of the records documenting the business function, activity and transactions. The descriptions can relate to one record such as a register or a group of records documenting a particular set of transactions.

#### **Disposal Action**

This is the minimum period a record must be kept for and is the trigger event from which the disposal date can be calculated.

## **FORMAT OF RECORD**

This Records Disposal Schedule is applicable to any record that performs the function prescribed, irrespective of format. Records may include:

cards,  
registers,  
files,  
microfilm,  
microfiche,  
COM (computer output microfiche),  
electronic records, including various electronic media, and  
any other formats.

## **ELECTRONIC RECORDS**

Refers to records created, communicated and maintained by means of electronic equipment. Information could be maintained/stored in a number of ways - on the database (the main database or a special archives database); on magnetic media; on optical disks or on separate hardcopy (paper, COM).

Electronic records must be readily accessible for the length of the specified retention period. Routine treatment (such as wiping, updating, alterations or rerecording) does constitute disposal.

## **DESTRUCTION OF RECORDS**

When the approved disposal date for the destruction of records has been reached, appropriate arrangements for their destruction should be made. It is the responsibility of each agency to ensure that its records are destroyed in a secure and appropriate manner as indicated in the agency Records Management Program.

## **UPDATING THE RECORDS DISPOSAL SCHEDULE**

Records Disposal Schedules are reviewed and updated from time to time. For suggested amendments or alterations to this schedule please contact the Director of Territory Records.

## **ASSISTANCE IN USING THE RECORDS DISPOSAL SCHEDULE**

Agencies requiring any assistance in the interpretation or implementation of any Records Disposal Schedule are encouraged to contact the Director of Territory Records.

## **RELATED LEGISLATION**

The following legislation is related to the record classes covered by this Records Disposal Schedule:

*Disability Discrimination Act 1992*  
*Disability Services Act 1991*  
*Evidence Act 1971*  
*Executive Documents Release Act 2001*  
*Financial Management Act 1996*  
*Freedom of Information Act 1989*  
*Government Contractual Debt (Interest) Act 1994*  
*Government Procurement Act 2001*  
*Health Records (Privacy and Access) Act 1997*  
*Housing Assistance Act 1987*  
*Occupational Health and Safety Act 1989*  
*Privacy Act 1998 (Commonwealth)*  
*Public Interest Disclosure Act 1994*  
*Public Sector Management Act 1994*  
*Recovery of Lands Act 1929*  
*Residential Tenancies Act 1997*  
*Territory Records Act 2002*  
*Unclaimed Moneys Act 1997*

## **DEFINITIONS**

### **AGENCY**

The Executive, an ACT Court, the Legislative Assembly Secretariat, an administrative unit, a Board of Inquiry, a Judicial or Royal Commission, any other prescribed authority, or an entity declared under the regulations of the *Territory Records Act 2002* to be an agency.

### **APPRAISAL**

The process of evaluating business activities to:

- determine which records need to be captured;
- how long the records need to be kept to meet business needs; and
- meet the requirements of organisational accountability and community expectations.

### **BUSINESS CLASSIFICATION SCHEME**

A hierarchical scheme for identifying and defining the functions, activities and transactions an agency performs in the conduct of its business, and the relationships between them.

### **PRINCIPAL OFFICER**

The Chief Executive of an administrative unit, or its equivalent in other types of agencies.

### **RECORDS**

Information created, received, and maintained as evidence and information by an organisation or person, in pursuance of legal obligations or in the transaction of business. This recorded information must be maintained or managed by the agency to provide evidence of their business activities. Records can be in written, electronic or any other form.

### **RECORDS OF AN AGENCY**

Records, in writing, electronic or any other form, under the control of an agency or to which it is entitled to control, kept as a record of its activities, whether it was created or received by the agency.

### **RECORDS DISPOSAL SCHEDULE**

A document approved by the Director of Territory Records, which sets out the types of records an agency must make and how long they must be kept.

### **RECORDS MANAGEMENT PROGRAM**

A document which complies with section 16 of the *Territory Records Act 2002* by setting out the means by which an agency will manage its records, and is approved by the agency's Principal Officer.

### **RECORDKEEPING SYSTEMS**

Information systems that capture, maintain and provide access to records over time. While the term is often associated with computer software, Recordkeeping Systems also encompass policies, procedures, practices and resources which are applied within an agency to ensure that full and accurate records of business activity are made and kept.

**SCOPE NOTE**

An explanation of terms used in describing the records and the context in which they were made and used.

**SENTENCING**

The process of applying appraisal decisions to individual records by determining the part of a Records Disposal Schedule which applies to the record and assigning a retention period consistent with that part.

**TERRITORY ARCHIVES**

Records preserved for the benefit of present and future generations.

## **BUSINESS CLASSIFICATION SCHEME**

## **ACCOMMODATION SUPPORT SERVICES**

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

### **Advocacy Services**

The activities involved in providing services designed to enable people who have a range of developmental delays to increase the control they have over their lives through the representation of their interests and views in the community. Includes group, citizen, individual and system advocacy. Also includes providing accessible information to people with developmental delays, carers, family and related professionals.

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

### **Appeals (decisions)**

The activities involved in the process of appeals against decisions by application to a higher authority.

### **Assessing**

The activities associated with processing applications, proposals or submissions to determine eligibility for government accommodation. Includes re-assessments.

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services. Includes community meetings.

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.



## **Enquiries**

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

## **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 the given situation. Includes systems analysis and ongoing monitoring.

## **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

## **Implementation**

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

## **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

## **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

## **Marketing**

The process of analysing, creating and selling products and services. Includes market research, advertising, media releases, promotion and product evaluation.

## **Meetings**

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

## **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

## **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

## **Program Development**

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

## **Public Reaction**

The process of handling public reaction to an organisation's policies or services. Includes anonymous letters, letters of complaint and letters of congratulations or appreciation received from the public.

## **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

## **Respite Services**

The activities associated with arranging and coordinating short term and time limited breaks for families and other voluntary care givers of people with developmental delays, to assist in supporting and maintaining the primary care giving relationship.

## **Reviewing**

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

### **Reviewing (decisions)**

The activities associated with responding to claimants or recipients requests to internally review an original decision made by the organisation concerning their entitlements and/or recovery of debt. Includes disputed decisions.

### **Reviewing (entitlements)**

The processes involved in conducting periodic circumstance and entitlement reviews. Includes compliance reviews that are selected because there is a justified, documented risk of fraud, misrepresentation, error or omission on the part of the recipient. Also includes processing changes to a person's circumstances when notified.

## **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

## **Tendering**

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate.

## **COMMUNITY ACCESS SERVICES**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services.

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

### **Enquiries**

The activities associated with the handling of requests for information about the agency and its services by the general public, agency employees or another agency.

### **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 the given situation. Includes systems analysis and ongoing monitoring.

### **Functions (social)**

The process of organising and managing an official or formal social occasion conducted by the agency to enhance its internal and external relationships, or to promote its services and image.

### **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

## **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

## **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

## **Meetings**

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

## **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

## **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

## **Program Development**

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

## **Public Reaction**

The process of handling public reaction to an organisation's policies or services. Includes anonymous letters, letters of complaint and letters of congratulations or appreciation received from the public.

## **Referring**

The activities associated with referring people who have additional needs for other services to external government agencies and/or community based organisations.

## **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

### **Respite Services**

The activities associated with arranging and coordinating short term and time limited breaks for families and other voluntary care givers of people with developmental delays, to assist in supporting and maintaining the primary care giving relationship.

### **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

### **Tendering**

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

## **COMMUNITY CONCESSION SERVICES**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

### **Advocacy Services**

The activities involved in providing services designed to enable people with developmental delays to increase the control they have over their lives through the representation of their interests and views in the community. Includes group, citizen, individual and system advocacy. Also includes providing accessible information to people with developmental delays, carers, family and related professionals.

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services. Includes community meetings.

### **Concession Claims**

The processes involved in receiving and assessing claims from a person in order to reach a decision for concessions on a range of essential services such as water, spectacles, public transport, electricity, etc.

### **Concession Payments**

The activities involved in the preparation and payment of money for essential services concession entitlements.

### **Enquiries**

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

## **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 the given situation. Includes systems analysis and ongoing monitoring.

## **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

## **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

## **Meetings**

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

## **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

## **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

## **Program Development**

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

## **Public Reaction**

The process of handling public reaction to an organisation's policies or services. Includes anonymous letters, letters of complaint and letters of congratulations or appreciation received from the public.

## **Referring**

The activities associated with referring people who have additional needs for other services to external government agencies and/or community based organisations.

## **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

## **Reviewing (decisions)**

The activities associated with responding to claimants or recipients requests to internally review an original decision made by the organisation concerning their entitlements and/or recovery of debt. Includes disputed decisions.

## **Reviewing (entitlements)**

The processes involved in conducting periodic circumstance and entitlement reviews. Includes compliance reviews that are selected because there is a justified, documented risk of fraud, misrepresentation, error or omission on the part of the recipient. Also includes processing changes to a person's circumstances when notified.

## **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

## **Tendering**

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.



## **HEALTH PROFESSIONAL SERVICES**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

### **Addresses (presentations)**

The activity of giving addresses for training, professional, community relations or sales purposes. Includes speeches and multi-media presentations.

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

### **Audit**

The activities associated with officially checking financial, quality assurance and operational records to ensure they have been kept and maintained in accordance with agreed or legislated standards and correctly record the events, processes and business of the organisation in a specified period. Includes compliance audits, financial audits, operational audits, recordkeeping audits, skills audits, system audits and quality assurance audits.

### **Authorisations**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services.

### **Counselling Services**

The activities associated with providing guidance and support to groups engaged in the provision of services to people with developmental delays and/or who are disadvantaged.

### **Consulting Services**

The activities involved in providing Consulting Services to external organisations such as early intervention playgroups, education units, child care programs and respite care. Includes determining needs, providing professional advice and follow up recommendations.

## **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using bureau services. Includes outsourcing.

## **Educating**

The activities associated with informing and educating the community about people living with a range of developmental delays and/or who are disadvantaged. Includes developing education programs, strategies and information handouts.

## **Enquiries**

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

## **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 the given situation. Includes systems analysis and ongoing monitoring.

## **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

## **Implementation**

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

## **In-Service Training**

The activities associated with training people engaged in the provision of services and/or other people who provide care for or assistance to people with developmental delays. Includes developing training programs, course content, handouts and rehabilitation aids.

## **Installation**

The activities involved in placing equipment in position and connecting and adjusting it for use.

## **Intake Services**

The processes involved in determining eligibility for the provision of health professional services to people who have developmental delays. Includes providing information about services offered, referring people to other appropriate services and registering eligible referrals and requests for in-service from external agencies. Also includes maintaining a register of interstate referrals and waiting lists for agency health professional services.

## **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

## **Leasing-out**

The activities involved in leasing out items, equipment, accommodation, premises or real estate to another agency or person for a specified period and agreed price. Includes formal documentation setting out conditions, rights, responsibilities, etc of both parties. Also includes subleasing.

## **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

## **Meetings**

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

## **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

## **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

## **Program Development**

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

## **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

## **Representatives**

The activities associated with the nomination, appointment or resignation of individuals or groups of personnel appointed by the organisation or their co-workers as official representatives to organisations, offices, unions, workers participation committees, councils or groups. Includes organisational legal representatives.

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

## **Reviewing**

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

## **Standards**

The process of implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the organisation.

## **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

## **Tendering**

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

## **PROPERTY SERVICES**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

### **Acquisition**

The process of gaining ownership or use of property and other items or the provision of services required in the conduct of business through purchase or requisitions.

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

### **Appeals (decisions)**

The activities involved in the process of appeals against decisions by application to a higher authority.

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

### **Claims**

The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury or death or denial of rights of a person or damage to or destruction of property. Includes disputes over rights and ownership and recompense sought for stolen or lost property.

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

### **Construction**

The process of making or building something.

### **Designing**

The activities associated with formulating development plans, drawings, sketches, etc for work to be undertaken. Includes preparing and submitting building and development applications and other documentation to another organisation for planning and land use approval.

## **Disposal**

The process of disposing of property no longer required by the agency, by sale, transfer, termination of lease, auction, donation or destruction. Includes destruction or transfer and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into storage.

## **Enquiries**

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

## **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 the given situation. Includes systems analysis and ongoing monitoring.

## **Fit-outs**

The process of establishing or refurbishing a workplace. Includes painting, floor coverings, furnishings, furniture, partitions/walls, fittings and equipment.

## **Implementation**

The activities associated with carrying out or putting into action plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

## **Installation**

The activities involved in placing equipment in position and connecting and adjusting it for use.

## **Insurance**

The process of taking out premiums to cover loss or damage to property or premises and to cover customers and staff against injury or death resulting from incidents on the agency's premises or whilst engaged during employment.

## **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

## **Leasing**

The activities involved in leasing items, equipment, accommodation, premises or real estate from another agency. Includes the process of chartering.

## **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

## **Maintenance**

The activities associated with the upkeep, repair, servicing, modification and preservation of internal/external conditions of premises, equipment, vehicles, etc.

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

## **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

## **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

## **Property Audits**

The activities involved in officially checking and examining the condition of government owned community facilities such as community centres, community houses, community halls and neighbourhood centres. Includes occupational, health and safety assessments and preparing property condition reports.

## **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

## **Reviewing**

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

## **Standards**

The process of implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the agency.

## **Stock Administration**

The activities associated with the counting and valuing of the government's public housing and accommodation portfolio. Includes maintaining an inventory of stock numbers and dwelling types.

## **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

## **Tendering**

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate.

## **TENANCY MANAGEMENT**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

### **Celebrations**

The activities associated with arranging and managing festivities to honour a particular activity.

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

### **Debt Management**

The processes involved in managing the recovery of legally recoverable debts such as repayments of rental arrears, sundry debts, prosecution debts through the courts, vacated debts, third party debts, rental bond loans, tenant responsible maintenance, etc.

### **Enquiries**

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

### **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 the given situation. Includes systems analysis and ongoing monitoring.

### **Implementation**

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.



## **Inspections**

The process of official examinations of facilities, equipment and items to ensure compliance with agreed standards and objectives.

## **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

## **Leasing-out**

The activities involved in leasing out items, equipment, accommodation, premises or real estate to another agency or person for a specified period and agreed price. Includes formal documentation setting out conditions, rights, responsibilities, etc of both parties. Also includes subleasing.

## **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

## **Meetings**

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

## **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

## **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

## **Public Reaction**

The process of handling public reaction to an organisation's policies or services. Includes anonymous letters, letters of complaint and letters of congratulations or appreciation received from the public.

## **Rental Processing**

The activities involved in processing the receipt of rental payments.

## **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

## **Reviewing**

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

## **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

## **Tenancy Register**

The activities involved in recording in a subsidiary register all government owned residencies that are leased out to the community. Includes date of occupation and vacancy, and address of the property.

## **Tendering**

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate.

## **RECORDS DISPOSAL SCHEDULE**

## **Accommodation Support Services**

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*

*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*


*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*

*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

*For responding to questions from the public for information about available accommodation and related services, use ACCOMMODATION SUPPORT SERVICES – Enquiries.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.1.1 	Records documenting the receipt and provision of advice relating to the accommodation support services function. Includes: advice to other agencies minutes providing advice to the Minister ministerial statements.	Destroy 7 years after action completed

## Accommodation Support Services

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*

*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*

*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*


*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### Advocacy Services

The activities involved in providing services designed to enable people who have a range of developmental delays to increase the control they have over their lives through the representation of their interests and views in the community. Includes group, citizen, individual and system advocacy. Also includes providing accessible information to people with developmental delays, carers, family and related professionals.

*For responding to an action or decision, use ACCOMMODATION SUPPORT SERVICES – Advice.*

*For handling requests for information about the organisation's services, use ACCOMMODATION SUPPORT SERVICES – Enquiries.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.2.1 	Records documenting the interests and views of people in the wider community who have developmental delays	Destroy 5 years after action completed

## **Accommodation Support Services**

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*

*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*

*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*

*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

*For Joint Venture agreements, use ACCOMMODATION SUPPORT SERVICES – Joint Ventures.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.3.1 ■■■■■■■■■■■■■■■■■■■■	Final versions of agreements made to support the accommodation support services function. Includes: funding agreements service contracts	Destroy 7 years after expiry or other termination of agreement.
1.3.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting negotiations, establishment, maintenance and review of agreements.	Destroy 7 years after expiry or other termination of agreement.

## **Accommodation Support Services**

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

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### ***Appeals (decisions)***

The activities involved in the process of appeals against decisions by application to a higher authority.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
1.4.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting appeals lodged by an individual against a public housing decision made by the agency where the outcome resulted in new whole of government policies or procedures.	Retain as Territory Archives
1.4.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting appeals lodged by an individual against a public housing decision made by the agency, eg, applications for early allocation, transfers or market rents.	Destroy 15 years after action completed
1.4.3 ■■■■■■■■■■■■■■■■■■■■	Records documenting appeals lodged by an individual with the Housing Review Committee or a Tribunal. Includes appeals by the agency.	Destroy 10 years after action completed

## **Accommodation Support Services**

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### **Assessing**

The activities associated with processing applications, proposals or submissions to determine eligibility for government accommodation. Includes re-assessments.

*For determining eligibility for entitlements to concessions on a range of essential services such as electricity, transport etc, use COMMUNITY CONCESSION SERVICES - Concession Claims.*

*For monitoring program funding payments to external organisations, use ACCOMMODATION SUPPORT SERVICES - Funding Administration.*

*For policies on eligibility for public housing assistance and rental rebates, use ACCOMMODATION SUPPORT SERVICES - Policy.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.5.1 	Records relating to the processes involved in assessing eligible applications for allocation of public housing and accommodation. Includes: registration for assistance forms interview notes reviews of entitlements early allocation applications questionnaires changes of address rent rebate applications reminder letters renewal applications offers of accommodation rental rebate calculations letters of advice eligibility criteria joint applications housing size – entitlement charts	Destroy 7 years after residence vacated.



## **Accommodation Support Services**

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*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

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*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*

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*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### **Assessing (Continued)**

The activities associated with processing applications, proposals or submissions to determine eligibility for government accommodation. Includes re-assessments.

*For determining eligibility for entitlements to concessions on a range of essential services such as electricity, transport etc, use COMMUNITY CONCESSION SERVICES - Concession Claims.*

*For monitoring program funding payments to external organisations, use ACCOMMODATION SUPPORT SERVICES - Funding Administration.*

*For policies on eligibility for public housing assistance and rental rebates, use ACCOMMODATION SUPPORT SERVICES - Policy.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.5.2 ■■■■■■■■■■■■■■■■■■■■	Records relating to updating applicant/waiting lists of eligible applicants.	Destroy 7 years after last entry
1.5.3 ■■■■■■■■■■■■■■■■■■■■	Records relating to ineligible applications and supporting documentation for the allocation of public housing and accommodation. Includes: registration for assistance forms early allocation applications rent rebate applications renewal applications	Destroy when reference ceases



## **Accommodation Support Services**

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### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

*For forums and meetings of individuals or groups that are not considered committees, use ACCOMMODATION SUPPORT SERVICES – Meetings.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.7.1 ■■■■■■■■■■	Records of internal committees formed to consider specific matters in support of the accommodation support services function. Includes: documents establishing the committee final versions of minutes reports recommendations supporting documents such as briefing papers and discussion papers.	Destroy 10 years after action completed
1.7.2 ■■■■■■■■■■	Records of external or inter-agency committees formed to consider accommodation support services matters where the agency is a member. Includes: documents establishing the committee appointment of members minutes supporting documents such as briefing papers and discussion papers.	Destroy 5 years after action completed.
1.7.3 ■■■■■■■■■■	Working papers documenting the conduct and administration of all committees that consider matters relating to the accommodation support services function. Includes: agenda notice of minutes draft of minutes	Destroy after action completed

## **Accommodation Support Services**

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### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services. Includes community meetings.

*For committees that have been established and managed by the agency and include community representatives, use ACCOMMODATION SUPPORT SERVICES – Committees.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.8.1 	Records documenting community opinions and comments that lead to the development of agency frameworks, programs, policies, strategies, guidelines, etc. Includes: written submissions reports background papers position papers draft proposals minutes agenda handout notes consultation programs	Destroy 2 years after action completed





## **Accommodation Support Services**

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### **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

*For formalising funding agreements with non-government organisations, use ACCOMMODATION SUPPORT SERVICES - Agreements*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.12.1 ■■■■■■■■■■■*	Records documenting successful funding applications made by external organisations and individuals to implement agency programs and services that relate to the accommodation support services function. Includes: advertising notices funding proposals funding submissions acknowledgement letters funding criteria copies of funding agreements performance reports milestone reports breaches of conditions funding acquittals	Destroy 7 years after action completed
1.12.2 ■■■■■■■■■■■	Records documenting unsuccessful funding applications made by external organisations and individuals to implement agency programs and services that relate to the accommodation support services function. Includes: funding proposals funding submissions funding criteria acknowledgement letters	Destroy 2 years after action completed.



## **Accommodation Support Services**

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### **Implementation**

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
1.13.1 	Records documenting the implementation of government responses, frameworks, policies, plans and strategies.	Destroy 10 years after action completed
1.13.2 	Records documenting the implementation of agency plans, policies, programs, procedures, and systems.	Destroy 6 years after action completed.



## **Accommodation Support Services**

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### ***Joint Ventures***

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

*For establishing and maintaining agreements not related to joint ventures, use ACCOMMODATION SUPPORT SERVICES – Agreements*

*For collaboration that is not considered a joint venture, use ACCOMMODATION SUPPORT SERVICES – Liaison*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
1.14.1 ■■■■■■■■■■	Records documenting important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers in support of the establishment, negotiation and management of joint ventures.	Destroy 10 years after action completed
1.14.2 ■■■■■■■■■■	Records documenting other less important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers supporting the establishment, negotiation and management of joint ventures.	Destroy 7 years after action completed.







## **Accommodation Support Services**

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### **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
1.19.1 ████████████████	Records documenting the development and establishment of the agency's key public housing and accommodation policies. Includes: research papers final policy documents.	Retain as Territory Archives
1.19.2 ████████████████	Records documenting the development and establishment of the agency's public housing and accommodation policies. Includes: policy proposals results of consultations supporting reports major drafts	Destroy 5 years after policy is superseded
1.19.3 ████████████████	Records documenting comments made on the development of government-wide accommodation support services policies.	Destroy 1 year after promulgation of new policy
1.19.4 ████████████████	Working papers documenting the development of all accommodation support services policies.	Destroy 1 year after promulgation of new policy.
1.19.5 ████████████████	Copies of policy documents and supporting papers.	Destroy when reference ceases.











## Accommodation Support Services

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### Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

*For market research, use ACCOMMODATION SUPPORT SERVICES – Marketing.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.24.1 ████████████████	Records documenting detailed research carried out to support the accommodation support services function.	Retain as Territory Archives
1.24.2 ████████████████	Records documenting routine research carried out to support the accommodation support services function.	Destroy when reference ceases.

### Respite Services

The activities associated with arranging and coordinating short term and time limited breaks for families and other voluntary care givers of people with developmental delays, to assist in supporting and maintaining the primary care giving relationship.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.25.1 ████████████████	Records documenting the arrangements for providing and coordinating respite services.	Destroy 7 years after action completed.

## **Accommodation Support Services**

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### **Reviewing**

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

*For evaluation and monitoring of potential or existing programs, equipment, systems or services, use ACCOMMODATION SUPPORT SERVICES – Evaluation.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.26.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting reviews of agency processes, products and programs relating to the accommodation support services function. Includes: terms of reference final report action plans	Destroy 10 years after action completed.
1.26.2 ■■■■■■■■■■■■■■■■■■■■	Working papers developed in support of reviews of agency processes, products and programs relating to the accommodation support services function.	Destroy 3 years after action completed

## **Accommodation Support Services**

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### **Reviewing (decisions)**

The activities associated with responding to claimants or recipients requests to internally review an original decision made by the organisation concerning their entitlements and/or recovery of debt. Includes disputed decisions.

*For the process of appeals against decisions by application to a higher authority such as a Court, Tribunal or Housing Review Committee, use ACCOMMODATION SUPPORT SERVICES – Appeals (decisions)*

*For programs and compliance reviews of recipients in receipt of entitlements, use ACCOMMODATION SUPPORT SERVICES – Reviewing (entitlements)*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.27.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the review by an independent body, of original decisions made by the agency, eg. public housing and accommodation applications for early allocation, transfers, market rents etc that were upheld. Includes: requests for review notifications of review review decisions and recommendations working papers	Destroy 10 years after action completed.
1.27.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting the review by an independent body, of original decisions made by the agency eg. public housing and accommodation applications for early allocation, transfers, market rents etc that were not upheld.	Destroy 5 years after action completed

## Accommodation Support Services

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### **Reviewing (entitlements)**

The processes involved in conducting periodic circumstance and entitlement reviews. Includes compliance reviews that are selected because there is a justified, documented risk of fraud, misrepresentation, error or omission on the part of the recipient. Also includes processing changes to a person's circumstances when notified.

*For the recovery of a legally recoverable debt, use TENANCY MANAGEMENT - Debt Management.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.28.1 ■■■■■■■■■■	Records documenting reviews of recipient's entitlements which are referred to an external body for further investigation.	Destroy 10 years after action completed.
1.28.2 ■■■■■■■■■■	Records documenting periodic circumstance and entitlement reviews.	Destroy 7 years after action completed
1.28.3 ■■■■■■■■■■	Records documenting reviews of recipient's entitlements where no further action is taken.	Destroy 3 years after action completed
1.28.4 ■■■■■■■■■■	Records documenting the disclosure of alleged wrongdoing by claimants or recipients where no investigation is undertaken.	Destroy 90 days after action completed

## **Accommodation Support Services**

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*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*

*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*

*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*

*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

## **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
1.29.1 ■■■■■■■■■■■■■■■■■■■■	Final version of submissions relating to controversial issues.	Retain as Territory Archives
1.29.2 ■■■■■■■■■■■■■■■■■■■■	Working papers used to develop submissions relating to controversial issues.	Retain as Territory Archives
1.29.3 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the development of agency submissions. Includes draft submissions.	Destroy when reference ceases

## **Accommodation Support Services**

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*

*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*

*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*

*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### ***Tendering***

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate.

*For managing the performance of work or the provision of services by an external contractor or consultant use, ACCOMMODATION SUPPORT SERVICES – Contracting out.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
1.30.1 ■■■■■■■■■■	Records documenting the development and issue of tender documentation. Includes: statement of requirements request for proposals expression of interest request for tender draft contract	Destroy 7 years after tender process completed
1.30.2 ■■■■■■■■■■	Assessment of tenders received against selection criteria. Includes: arrangements for carrying out the assessment process assessment report recommendations final report public notices	Destroy 7 years after tender process completed
1.30.3 ■■■■■■■■■■	Records documenting post offer negotiations and due diligence checks.	Destroy 7 years after tender process completed





## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.1.1 ■■■■■■■■■■	Records documenting the receipt and provision of advice relating to the community access services function. Includes: advice to other agencies minutes providing advice to the Minister and ministerial statements	Destroy 7 years after action completed

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.2.1 ■■■■■■■■■■	Final versions of agreements made to support the community access services function. Includes funding agreements and service contracts	Destroy 7 years after expiry or other termination of agreement.
2.2.2 ■■■■■■■■■■	Records documenting negotiations, establishment, maintenance and review of agreements.	Destroy 7 years after expiry or other termination of agreement

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.3.1 ■■■■■■■■■■	Delegations of power to agency staff to authorise administrative action in support of the community access services function.	Destroy 10 years after delegation expires or is superseded.
2.3.2 ■■■■■■■■■■	Authorisations for administrative actions in support of the community access services function.	Destroy 7 years after authorisation expires or is superseded



## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

*For forums and meetings of individuals or groups that are not considered committees, use COMMUNITY ACCESS SERVICES – Meetings.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.4.1 ■■■■■■■■■■■■■■■■■■■■	Records of internal committees formed to consider specific matters in support of the community access services function. Includes: documents establishing the committee final versions of minutes reports recommendations supporting documents such as briefing papers and discussion papers.	Destroy 10 years after action completed
2.4.2 ■■■■■■■■■■■■■■■■■■■■	Records of external or inter-agency committees formed to consider community access services matters where the agency is a member. Includes: documents establishing the committee appointment of members minutes supporting documents such as briefing papers and discussion papers.	Destroy 5 years after action completed.
2.4.3 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the conduct and administration of all committees that consider matters relating to the community access services function. Includes: agenda notice of minutes draft of minutes	Destroy after action completed

## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services.

*For committees that have been established and managed by the agency and include community representatives, use COMMUNITY ACCESS SERVICES – Committees.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.5.1 ■■■■■■■■■■	Records documenting community opinions and comments that lead to the development of agency frameworks, programs, policies, strategies, guidelines, etc. Includes: written submissions reports background papers position papers draft proposals minutes agenda handout notes consultation programs	Destroy 2 years after action completed

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.6.1 ■■■■■■■■■■	Records documenting contract management that involves significant litigation or complaint.	Destroy 15 years after dispute resolved and/or action completed.
2.6.2 ■■■■■■■■■■	Records documenting contract management that does not involve significant litigation or complaint.	Destroy 7 years after action completed

## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### **Enquiries**

The activities associated with the handling of requests for information about the agency and its services by the general public, agency employees or another agency.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.7.1 ■■■■■■■■■■	Records documenting the handling of public enquiries about the agency and its programs, products and services in support of the community access services function.	Destroy 2 years after action completed

### **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 the given situation. Includes systems analysis and ongoing monitoring.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.8.1 ■■■■■■■■■■	Records documenting the evaluation of potential or existing programs and services relating to the community access services function.	Destroy 7 years after action completed
2.8.2 ■■■■■■■■■■	Records documenting systems analysis and ongoing monitoring.	Destroy 5 years after action completed

### **Functions (social)**

The process of organising and managing an official or formal social occasion conducted by the agency to enhance its internal and external relationships, or to promote its services and image.

*For addresses made at functions, use COMMUNITY RELATIONS - Addresses*

*For managing financial transactions supporting functions, use FINANCIAL MANAGEMENT - Accounting and/or FINANCIAL MANAGEMENT - Payments.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.9.1 ■■■■■■■■■■	Records documenting the organisation and management of an official or formal social occasion. Includes venue bookings, guest lists, invitations and catering.	Destroy 2 years after action completed

## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

*For formalising funding agreements with non-government organisations, use COMMUNITY CONCESSION SERVICES - Agreements*

<i><b>Entry No.</b></i>	<i><b>Description of Records</b></i>	<i><b>Disposal Action</b></i>
2.10.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting successful funding applications made by external organisations and individuals to implement agency programs and services that relate to the community access services function. Includes: advertising notices funding proposals funding submissions acknowledgement letters funding criteria copies of funding agreements performance reports milestone reports breaches of conditions funding acquittals	Destroy 7 years after action completed
2.10.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting unsuccessful funding applications made by external organisations and individuals to implement agency programs and services that relate to the community access services function. Includes: funding proposals funding submissions funding criteria acknowledgement letters	Destroy 2 years after last action.

## Community Access Services

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### Joint Ventures

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

*For formal advisings, use COMMUNITY ACCESS SERVICES – Advice*

*For other collaboration between organisations that are not considered Joint Ventures, use COMMUNITY ACCESS SERVICES – Liaison*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.11.1 ■■■■■■■■■■	Records documenting important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers in support of the establishment, negotiation and management of joint ventures.	Retain as Territory Archives
2.11.2 ■■■■■■■■■■	Records documenting other less important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers supporting the establishment, negotiation and management of joint ventures.	Destroy 7 years after action completed

### Liaison

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

*For formal advice, use COMMUNITY ACCESS SERVICES – Advice.*

*For collaboration that involves contracts and joint contributions of time and/or funding, use COMMUNITY ACCESS SERVICES– Joint Ventures.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.12.1 ■■■■■■■■■■	Records documenting liaison activities undertaken with professional associations, private sector organisations and community groups. Includes collaboration on projects and exchange of information.	Destroy 3 years after action completed

## Community Access Services

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### Meetings

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

*For meetings of committees and task forces, use COMMUNITY ACCESS SERVICES – Committees.*

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
2.13.1 ■■■■■■■■■■■■■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held in support of the community access services function.	Destroy 3 years after action completed
2.13.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the conduct and administration of all meetings in support of the community access services function.	Destroy after minutes finalised

### Planning

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
2.14.1 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives
2.14.2 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and have no impact on cross-portfolio administration and/or have no far reaching social and economic implications.	Destroy 6 years after plan superseded
2.14.3 ■■■■■■■■■■■■■■■■■■■■	Working papers created in the development of all plans. Includes: draft plans working reports internal agency comments	Destroy 1 year after adoption of the final plan.

## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.15.1 ■■■■■■■■■■	Records documenting the development and establishment of the agency's community access services policies. Includes: policy proposals research papers results of consultations supporting reports major drafts final policy documents	Destroy 5 years after policy is superseded.
2.15.2 ■■■■■■■■■■	Records documenting comments made on the development of government-wide community access services policies.	Destroy 1 year after promulgation of new policy
2.15.3 ■■■■■■■■■■	Working papers documenting the development of all community access services policies.	Destroy 1 year after promulgation of new policy
2.15.4 ■■■■■■■■■■	Copies of policy documents and supporting papers.	Destroy when reference ceases







## Community Access Services

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
2.21.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting detailed research carried out to support the community access services function.	Retain as Territory Archives
2.21.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting routine research carried out to support the community access services function.	Destroy when reference ceases.

### Respite Services

The activities associated with arranging and coordinating short term and time limited breaks for families and other voluntary care givers of people with developmental delays, to assist in supporting and maintaining the primary care giving relationship.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
2.22.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the arrangements for providing and coordinating respite services.	Destroy 7 years after action completed

### Submissions

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
2.23.1 ■■■■■■■■■■■■■■■■■■■■	Final version of agency submissions made to other agencies and community organisations.	Destroy 7 years after action completed
2.23.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the development of agency submissions. Includes draft submissions.	Destroy when reference ceases

## **Community Access Services**

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### ***Tendering***

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

*For managing the performance of work or the provision of services by an external contractor or consultant use, COMMUNITY ACCESS SERVICES – Contracting out.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
2.24.1 ■■■■■■■■■■	Records documenting the development and issue of tender documentation. Includes: statement of requirements request for proposals expression of interest request for tender draft contract	Destroy 7 years after tender process completed.
2.24.2 ■■■■■■■■■■	Assessment of tenders received against selection criteria. Includes: arrangements for carrying out the assessment process assessment report recommendations final report public notices	Destroy 7 years after tender process completed.
2.24.3 ■■■■■■■■■■	Records documenting post offer negotiations and due diligence checks.	Destroy 7 years after tender process completed
2.24.4 ■■■■■■■■■■	Contract register.	Destroy 7 years after last entry
2.24.5 ■■■■■■■■■■	Tender register.	Destroy 7 years after last entry
2.24.6 ■■■■■■■■■■	Signed simple contracts and agreements resulting from tenders and supporting records.	Destroy 7 years after completion or other termination of contract.
2.24.7 ■■■■■■■■■■	Records of unsuccessful tenders or a tender process where there has been no suitable bidder or where the tender process has been discontinued. Includes: submissions notification of outcome reports on debriefing sessions	Destroy 2 years after the tender process completed or decision made not to continue with the tender process

## Community Concession Services

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### Advice

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

For responding to questions from the public on information about available concessions and related services, use *COMMUNITY CONCESSION SERVICES – Enquiries*.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
3.1.1 ■■■■■■■■■■	Records documenting the receipt and provision of advice relating to the community concession services function. Includes: advice to other agencies minutes providing advice to the Minister ministerial statements	Destroy 7 years after action completed

### Advocacy Services

The activities involved in providing services designed to enable people with developmental delays to increase the control they have over their lives through the representation of their interests and views in the community. Includes group, citizen, individual and system advocacy. Also includes providing accessible information to people with developmental delays, carers, family and related professionals.

For responding to an action or decision, use *COMMUNITY CONCESSION SERVICES – Advice*.

For handling requests for information about the organisation's services, use *COMMUNITY CONCESSION SERVICES – Enquiries*.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
3.2.1 ■■■■■■■■■■	Records documenting the interests and views of people in the wider community who have developmental delays.	Destroy 5 years after action completed

### Agreements

The processes associated with the establishment, maintenance, review and negotiation of agreements.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
3.3.1 ■■■■■■■■■■	Final versions of agreements made to support the community concession services function. Includes funding agreements and service contracts	Destroy 7 years after expiry or other termination of agreement.
3.3.2 ■■■■■■■■■■	Records documenting negotiations, establishment, maintenance and review of agreements.	Destroy 7 years after expiry or other termination of agreement

## Community Concession Services

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### Authorisation

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
3.4.1 ████████████████	Delegations of power to agency staff to authorise administrative action in support of community concession services.	Destroy 10 years after delegation expires or is superseded
3.4.2 ████████████████	Authorisations for administrative actions in support of community concession services	Destroy 7 years after authorisation expires or is superseded

### Committees

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

*For forums and meetings of individuals or groups that are not considered committees, use HEALTH CONCESSION SERVICES – Meetings.*

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
3.6.1 ████████████████	Records of internal committees formed to consider specific matters in support of the community concession services function. Includes: documents establishing the committee final versions of minutes reports recommendations and supporting documents such as briefing papers and discussion papers.	Destroy 10 years after action completed
3.6.2 ████████████████	Records of external or inter-agency committees formed to consider community concession services matters where the agency is a member. Includes: documents establishing the committee appointment of members minutes and supporting documents such as briefing papers and discussion papers.	Destroy 5 years after action completed.
3.6.3 ████████████████	Working papers documenting the conduct and administration of all committees that consider matters relating to the community concession services function. Includes agenda, notice of minutes and draft of minutes	Destroy after action completed

## Community Concession Services


The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### Community Liaison

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services. Includes community meetings.

*For committees that have been established and managed by the agency and include community representatives, use HEALTH CONCESSION SERVICES – Committees.*


<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
3.7.1 	Records documenting community opinions and comments that lead to the development of agency frameworks, programs, policies, strategies, guidelines, etc. Includes: written submissions reports background papers position papers draft proposals minutes agenda handout notes consultation programs	Destroy 2 years after action completed

### Concession Claims

The processes involved in receiving and assessing claims from a person in order to reach a decision for concessions on a range of essential services such as water, spectacles, public transport, electricity, etc.

*For the preparation and payment of money to eligible claimants, use COMMUNITY CONCESSION SERVICES – Concession payments.*

*For responding to an enquiry for information about rates of payments, etc, use COMMUNITY CONCESSION SERVICES – Enquiries.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
3.8.1 	Records relating to the processes involved in assessing applications to determine eligibility for expenditure support. Includes: rebate applications entitlement criteria interview notes reviews of entitlements questionnaires change of address reminder letters renewal applications	Destroy 7 years after action completed

## **Community Concession Services**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### ***Concession Payments***

The activities involved in the preparation and payment of money for essential services concession entitlements.

*For assessing a person's entitlement to a concession for essential services such as electricity, etc, use COMMUNITY CONCESSION SERVICES – Concession Claims.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.9.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the preparation and payment of money for essential services concession entitlements.	Destroy 7 years after action completed

### ***Contracting out***

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.5.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting contract management that involves significant litigation or complaint.	Destroy 15 years after dispute resolved and/or action completed.
3.5.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting contract management that does not involve significant litigation or complaint.	Destroy 7 years after action completed

### ***Enquiries***

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.10.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the handling of public enquiries about the agency and its programs, products and services in relation to the community concession services function.	Destroy 2 years after action completed

## **Community Concession Services**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### **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 the given situation. Includes systems analysis and ongoing monitoring.

*For re-evaluating processes after implementation, use and monitoring, use COMMUNITY CONCESSION SERVICES – Reviewing.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
3.11.1 ████████████████	Records documenting the evaluation of potential or existing programs and services relating to the community concession services function.	Destroy 7 years after action completed
3.11.2 ████████████████	Records documenting systems analysis and ongoing monitoring.	Destroy 5 years after action completed

### **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

*For formalising funding agreements with non-government organisations, use COMMUNITY CONCESSION SERVICES - Agreements*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
3.12.1 ████████████████	Records documenting successful funding applications made by external organisations and individuals to implement agency programs and services that relate to the community concession services function. Includes: advertising notices funding proposals funding submissions acknowledgement letters funding criteria copies of funding agreements performance reports milestone reports breaches of conditions funding acquittals	Destroy 7 years after action completed
3.12.2 ████████████████	Records documenting unsuccessful funding applications made by external organisations and individuals to implement agency programs and services that relate to the community concession services function. Includes: funding proposals funding submissions funding criteria acknowledgement letters	Destroy 2 years after action completed



## Community Concession Services

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### *Liaison*

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

*For formal advice, use COMMUNITY CONCESSION SERVICES – Advice.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.13.1 ■■■■■■■■■■	Records documenting liaison activities undertaken with professional associations, private sector organisations and community groups. Includes collaboration on projects and exchange of information.	Destroy 3 years after action completed

### *Meetings*

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

*For meetings of committees and task forces, use COMMUNITY CONCESSION SERVICES – Committees.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.14.1 ■■■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held in support of the community concession services function.	Destroy 3 years after action completed
3.14.2 ■■■■■■■■■■	Working papers documenting the conduct and administration of all meetings in support of the community concession services function.	Destroy after minutes finalised

### *Planning*

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.15.1 ■■■■■■■■■■	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives
3.15.2 ■■■■■■■■■■	Final version of plans that support key government initiatives and have no impact on cross-portfolio administration and/or have no far reaching social and economic implications.	Destroy 6 years after plan superseded
3.15.3 ■■■■■■■■■■	Working papers created in the development of all plans. Includes: draft plans working reports internal agency comments	Destroy 1 year after adoption of the final plan.

## **Community Concession Services**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### ***Policy***

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.16.1 ████████████████	Records documenting the development and establishment of the agency's community concession services policies. Includes: policy proposals research papers results of consultations supporting reports major drafts final policy documents	Destroy 5 years after policy is superseded.
3.16.2 ████████████████	Records documenting comments made on the development of government-wide community concession services policies.	Destroy 1 year after promulgation of new policy
3.16.3 ████████████████	Working papers documenting the development of all community concession services policies.	Destroy 1 year after promulgation of new policy
3.16.4 ████████████████	Copies of policy documents and supporting papers.	Destroy when reference ceases

### ***Procedures***

Standard methods of operating laid down by an organisation according to formulated policy.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.17.1 ████████████████	Master set of agency manuals, handbooks, directives, etc.	Destroy when procedures are superseded.
3.17.2 ████████████████	Records documenting the development of agency procedures supporting the community access services function.	Destroy 1 year after production of procedures
3.17.3 ████████████████	Copies of manuals, handbooks, directives, etc.	Destroy when reference ceases

## **Community Concession Services**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### ***Program Development***

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

*For determining the suitability of potential or existing programs, use COMMUNITY ACCESS SERVICES – Evaluation.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.18.1 ████████████████	Records documenting the development of programs that have significant far reaching social and economic implications for the community.	Retain as Territory Archives.
3.18.2 ████████████████	Records documenting the development of programs that have no far reaching social and economic implications for the community.	Destroy 6 years after action completed

### ***Public Reaction***

The process of handling public reaction to an organisation's policies or services. Includes anonymous letters, letters of complaint and letters of congratulations or appreciation received from the public.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.19.1 ████████████████	Records documenting public reaction and agency responses.	Destroy 6 years after action completed

### ***Referring***

The activities associated with referring people who have additional needs for other services to external government agencies and/or community based organisations.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.20.1 ████████████████	Records documenting referrals to other specialist government and/or non-government organisations	Destroy 2 years after action completed



## **Community Concession Services**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### ***Reviewing (decisions)***

The activities associated with responding to claimants or recipients requests to internally review an original decision made by the organisation concerning their entitlements and/or recovery of debt. Includes disputed decisions.

*For programs and compliance reviews of recipients in receipt of entitlements, use COMMUNITY CONCESSION SERVICES – Reviewing (entitlements)*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.23.1 ████████████████████	Records documenting the review by an independent body of original decisions made by the agency that were upheld. Includes: requests for review notifications of review review decisions and recommendations working papers	Destroy 10 years after action completed
3.23.2 ████████████████████	Records documenting the review by an independent body of original decisions made by the agency that were not upheld.	Destroy 5 years after action completed

### ***Reviewing (entitlements)***

The processes involved in conducting periodic circumstance and entitlement reviews. Includes compliance reviews that are selected because there is a justified, documented risk of fraud, misrepresentation, error or omission on the part of the recipient. Also includes processing changes to a person's circumstances when notified.

*For the recovery of a legally recoverable debt, use TENANCY MANAGEMENT - Debt Management.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.24.1 ████████████████████	Records documenting reviews of recipient entitlements which are referred to an external body for further investigation.	Destroy 10 years after action completed
3.24.2 ████████████████████	Records documenting entitlement reviews to ensure that correct payments are made and persons receiving them remain eligible. Includes compliance reviews.	Destroy 7 years after action completed
3.24.3 ████████████████████	Records documenting reviews of recipient entitlements where no further action is taken	Destroy 3 years after action completed
3.24.4 ████████████████████	Records documenting the disclosure of alleged wrongdoing by claimants or recipients where no investigation is undertaken.	Destroy 90 days after action completed



## **Community Concession Services**



The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

### ***Tendering (Continued)***

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

*For managing the performance of work or the provision of services by an external contractor or consultant use,  
COMMUNITY CONCESSION SERVICES – Contracting out.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.26.6 	Signed simple contracts and agreements resulting from tenders and supporting records.	Destroy 7 years after completion or other termination of contract.
3.26.7 	Contract register.	Destroy 7 years after last entry

## **HEALTH PROFESSIONAL SERVICES**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### ***Addresses (presentations)***

The activity of giving addresses for training, professional, community relations or sales purposes. Includes speeches and multi-media presentations.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.1.1 ■■■■■■■■■■	Final version of addresses delivered by the portfolio minister or senior agency officers at public and other important events	Destroy 10 years after action completed
4.1.2 ■■■■■■■■■■	Final version of addresses delivered by agency staff other than senior officers at public and other important events	Destroy 5 years after action completed
4.1.3 ■■■■■■■■■■	Working papers documenting the development of all addresses including drafts	Destroy after action completed

### ***Advice***

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.2.1 ■■■■■■■■■■	Records documenting the receipt and provision of advice relating to the health professional services function. Includes: advice to other agencies minutes providing advice to the Minister ministerial statements	Destroy 7 years after action completed



## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

*For Joint Venture agreements, use HEALTH PROFESSIONAL SERVICES – Joint Ventures.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.3.1 ■■■■■■■■■■■■■■■■■■■■	Final versions of agreements made to support the health professional services function. Includes funding agreements and service contracts	Destroy 7 years after expiry or other termination of agreement
4.3.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting negotiations, establishment maintenance and review of agreements	Destroy 7 years after expiry or other termination of agreement

### **Audit**

The activities associated with officially checking financial, quality assurance and operational records to ensure they have been kept and maintained in accordance with agreed or legislated standards and correctly record the events, processes and business of the organisation in a specified period. Includes compliance audits, financial audits, operational audits, recordkeeping audits, skills audits, system audits and quality assurance audits.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.4.1 ■■■■■■■■■■■■■■■■■■■■	Final audit reports	Destroy 10 years after action completed.
4.4.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting the planning and conduct of audits. Includes: minutes of meetings notes taken at opening and exit interviews report comments	Destroy 5 years after action completed

## Health Professional Services

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### Authorisations

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
4.5.1 ■■■■■■■■■■■■■■■■■■■■	Delegations of power to agency staff to authorise administrative action in support of health professional services	Destroy 10 years after delegation expires or is superseded
4.5.2 ■■■■■■■■■■■■■■■■■■■■	Authorisations for administrative actions in support of health professional services	Destroy 7 years after authorisation expires or is superseded

## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

*For forums and meetings of individuals or groups that are not considered committees, use HEALTH PROFESSIONAL SERVICES – Meetings.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.6.1 ████████████████	Records of internal committees formed to consider specific matters in support of the health professional services function. Includes: documents establishing the committee final versions of minutes reports recommendations supporting documents such as briefing papers and discussion papers.	Destroy 10 years after action completed
4.6.2 ████████████████	Records of external or inter-agency committees formed to consider health professional services matters where the agency is a member. Includes: documents establishing the committee appointment of members minutes supporting documents such as briefing papers and discussion papers.	Destroy 5 years after action completed.
4.6.3 ████████████████	Working papers documenting the conduct and administration of all committees that consider matters relating to the health professional services function. Includes: agenda notice of minutes draft of minutes	Destroy after action completed

## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### **Community Liaison**

The process undertaken to formally seek opinions and comments which contribute to the development of agency programs, processes, products, projects, publications, policy, legislation, standards, guidelines and services.

*For committees that have been established and managed by the agency and include community representatives, use HEALTH PROFESSIONAL SERVICES – Committees.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.7.1 ■■■■■■■■■■	Records documenting community opinions and comments that lead to the development of agency frameworks, programs, policies, strategies, guidelines, etc. Includes: written submissions reports background papers position papers draft proposals minutes agenda handout notes consultation programs	Destroy 2 years after action completed

### **Consulting Services**

The activities involved in providing Consulting Services to external organisations such as early intervention playgroups, education units, child care programs and respite care. Includes determining needs, providing professional advice and follow up recommendations.

*For training people engaged in the provision of services to people with developmental delays, use HEALTH PROFESSIONAL SERVICES – In-Service Training.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.9.1 ■■■■■■■■■■	Records documenting the provision of consulting services by the agency to external organisations. Includes: notes taken at briefing interviews recommendations action plans progress reports working papers developed to support the provision of consultancy services.	Destroy 7 years after the completion or other termination of contract

## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### ***Contracting out***

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using bureau services. Includes outsourcing.

*For the process of receiving and assessing tenders from potential external consultants for services prior to the contract agreement, use HEALTH PROFESSIONAL SERVICES - Tendering.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.10.1 ████████████████	Records documenting contract management that involves significant litigation or complaint.	Destroy 15 years after dispute resolved and/or action completed.
4.10.2 ████████████████	Records documenting contract management that does not involve significant litigation or complaint	Destroy 7 years after action completed

### ***Counselling Services***

The activities associated with providing guidance and support to groups engaged in the provision of services to people with developmental delays and/or who are disadvantaged.

*For counselling given by social workers and/or psychologists to individual people, use HEALTH PROFESSIONAL SERVICES – Cases.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.8.1 ████████████████	Records documenting counselling services provided by the agency.	Destroy 2 years after action completed



## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### ***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 the given situation. Includes systems analysis and ongoing monitoring.

*For re-evaluating processes after implementation, use and monitoring, use HEALTH PROFESSIONAL SERVICES – Reviewing.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.13.1 	Records documenting the evaluation of potential or existing programs and services relating to the health professional services function.	Destroy 7 years after action completed.
4.13.2 	Records documenting systems analysis and ongoing monitoring	Destroy 5 years after action completed.

## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### **Funding Administration**

The activities associated with administering funding to external people and organisations to implement programs, projects and provide services on behalf of the agency. Includes advertising funding programs, receiving and appraising funding proposals, arranging for funds to be released, monitoring the ongoing performance of the funding activity, dealing with breaches of funding conditions and acquittal of funds.

*For formalising funding agreements with non-government organisations, use HEALTH PROFESSIONAL SERVICES - Agreements*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.14.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting successful funding applications made by external organisations and individuals to implement agency programs and services that relate to the community concession services function. Includes: advertising notices funding proposals funding submissions acknowledgement letters funding criteria copies of funding agreements performance reports milestone reports breaches of conditions funding acquittals	Destroy 7 years after action completed
4.14.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting unsuccessful funding applications made by external organisations and individuals to implement agency programs and services that relate to the community concession services function. Includes: funding proposals funding submissions funding criteria acknowledgement letters	Destroy 2 years after action completed



## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### **Implementation**

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.15.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the implementation of government responses, frameworks, policies, plans and strategies.	Destroy 10 years after action completed
4.15.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting the implementation of agency plans, policies, programs, procedures, and systems	Destroy 6 years after action completed

### **In-Service Training**

The activities associated with training people engaged in the provision of services and/or other people who provide care for or assistance to people with developmental delays. Includes developing training programs, course content, handouts and rehabilitation aids.

*For determining needs, providing professional advice and follow-up recommendations to early intervention units, playgroups, etc, use HEALTH PROFESSIONAL SERVICES – Consulting Services.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.16.1 ■■■■■■■■■■■■■■■■■■■■	Master set of training material for courses provided by the agency. Includes: training programs workbooks handouts presentation aids	Destroy when course is superseded or when training material is no longer relevant.
4.16.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the development of training programs provided by the agency. Includes: promotional flyers notes course evaluation forms	Destroy 1 year after action completed.

## Health Professional Services

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*


*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### ***In-Service Training (Continued)***

The activities associated with training people engaged in the provision of services and/or other people who provide care for or assistance to people with developmental delays. Includes developing training programs, course content, handouts and rehabilitation aids.


*For determining needs, providing professional advice and follow-up recommendations to early intervention units, playgroups, etc, use HEALTH PROFESSIONAL SERVICES – Consulting Services.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.16.3 	Records detailing the administrative arrangements supporting training courses provided by the agency. Includes: requests for service venue bookings hire of training equipment catering	Destroy 2 years after action completed

### ***Installation***

The activities involved in placing equipment in position and connecting and adjusting it for use.

*For checking systems to meets required standards, use HEALTH PROFESSIONAL SERVICES – Implementation.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.17.1 	Records documenting the installation of equipment	Destroy after replacement of equipment or transfer to new owner



## Health Professional Services

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*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### Joint Ventures

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

*For formal advisings, use HEALTH PROFESSIONAL SERVICES – Advice*

*For other collaboration between organisations that are not considered Joint Ventures, use HEALTH PROFESSIONAL SERVICES – Liaison*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.19.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers in support of the establishment, negotiation and management of joint ventures.	Destroy 10 years after action completed
4.19.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting other less important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers supporting the establishment, negotiation and management of joint ventures.	Destroy 7 years after action completed

### Leasing-out

The activities involved in leasing out items, equipment, accommodation, premises or real estate to another agency or person for a specified period and agreed price. Includes formal documentation setting out conditions, rights, responsibilities, etc of both parties. Also includes subleasing.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.20.1 ■■■■■■■■■■■■■■■■■■■■	Arrangements for the leasing -out of agency equipment to other bodies. Includes signed leases	Destroy 7 years after lease expires or is terminated

## **Health Professional Services**

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.

*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### ***Liaison***

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

*For formal advice, use HEALTH PROFESSIONAL SERVICES – Advice.*

*For collaboration that involves contracts and joint contributions of time and/or funding, use HEALTH PROFESSIONAL SERVICES– Joint Ventures.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.21.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting liaison activities undertaken with professional associations, private sector organisations and community groups. Includes collaboration on projects and exchange of information.	Destroy 3 years after action completed

### ***Meetings***

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

*For meetings of committees and task forces, use HEALTH PROFESSIONAL SERVICES – Committees.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.22.1 ■■■■■■■■■■■■■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held in support of the health professional services function.	Destroy 3 years after action completed
4.22.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the conduct and administration of all meetings in support of the health professional services function.	Destroy after minutes finalised.

## **Health Professional Services**

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*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
4.23.1 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives
4.23.2 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and have no impact on cross-portfolio administration and/or have no far reaching social and economic implications.	Destroy 6 years after plan superseded
4.23.3 ■■■■■■■■■■■■■■■■■■■■	Working papers created in the development of all plans. Includes: draft plans working reports internal agency comments	Destroy 1 year after adoption of the final plan.







## Health Professional Services

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*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### 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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

<i><b>Entry No.</b></i>	<i><b>Description of Records</b></i>	<i><b>Disposal Action</b></i>
4.27.1 ■■■■■■■■■■	Final version of internal formal reports and reports made to external agencies in relation to the health professional services function	Destroy 5 years after action completed
4.27.2 ■■■■■■■■■■	Final version of periodic internal reports on general administrative matters used to monitor and document recurring activities to support the health professional services function. Includes the collection and reporting of statistical information	Destroy 3 years after action completed.
4.27.3 ■■■■■■■■■■	Responses to surveys carried out to support the health professional services function.	Destroy 3 years after action completed
4.27.4 ■■■■■■■■■■	Working papers documenting the development of all reports. Includes drafts and comments received.	Destroy when reference ceases
4.27.5 ■■■■■■■■■■	Copies of health professional services reports.	Destroy when reference ceases

## Health Professional Services

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*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### Representatives

The activities associated with the nomination, appointment or resignation of individuals or groups of personnel appointed by the organisation or their co-workers as official representatives to organisations, offices, unions, workers participation committees, councils or groups. Includes organisational legal representatives.

*For legal advice furnished to the organisation by internal or external sources, use LEGAL SERVICES.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.28.1 ██████████████	Records documenting the nomination, appointment, resignation and/or termination of agency representatives on inter-governmental forums and non-government organisations, forums, working parties, etc.	Destroy 3 years after action completed
4.28.2 ██████████████	Records documenting the nomination, appointment resignation and/or termination of staff members on inter-governmental and non-government organisations, forums, working parties, etc	Destroy 3 years after end of appointment

### Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

*For research into the formulation of policy, use HEALTH PROFESSIONAL SERVICES – Policy.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.29.1 ██████████████	Records documenting detailed research carried out to support the health professional services function	Destroy 5 years after action completed
4.29.2 ██████████████	Records documenting routine research carried out to support the health professional services function	Destroy when reference ceases





## Health Professional Services

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*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

### Tendering

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
4.33.1 ████████████████	Records documenting the development and issue of tender documentation. Includes: statement of requirements request for proposals expression of interest request for tender draft contract	Destroy 7 years after tender process completed.
4.33.2 ████████████████	Assessment of tenders received against selection criteria. Includes: arrangements for carrying out the assessment process assessment report recommendations final report public notices	Destroy 7 years after tender process completed.
4.33.3 ████████████████	Records documenting post offer negotiations and due diligence checks.	Destroy 7 years after tender process completed
4.33.4 ████████████████	Tender register.	Destroy 7 years after last entry
4.33.5 ████████████████	Signed simple contracts and agreements resulting from tenders and supporting records.	Destroy 7 years after completion or other termination of contract.
4.33.6 ████████████████	Contract register.	Destroy 7 years after last entry
4.33.7 ████████████████	Records of unsuccessful tenders or a tender process where there has been no suitable bidder or where the tender process has been discontinued. Includes: submissions notification of outcome reports on debriefing sessions	Destroy 2 years after the tender process completed or decision made not to continue with the tender process

## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Acquisition**

The process of gaining ownership or use of property and other items or the provision of services required in the conduct of business through purchase or requisitions.

*For obtaining services of consultants and/or contractors, use PROPERTY SERVICES – Contracting out.*

*For leasing items, equipment, accommodation or property from another organisation, use PROPERTY SERVICES – Leasing.*

*For the process of receiving and assessing tenders, use PROPERTY SERVICES – Tendering.*

*Once the tender has been decided, the activity descriptor Acquisition may be used.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.1.1 ■■■■■■■■■■	Deeds and certificates of title for government owned properties such as public housing stock.	Transfer to new owner when property is disposed of
5.1.2 ■■■■■■■■■■	Signed contracts under seal resulting from tenders and supporting records for the acquisition of property when there is no tendering process	Destroy 12 years after disposal of property
5.1.3 ■■■■■■■■■■	Records documenting the acquisition of properties including compulsory acquisitions. Includes: investigations and reports on the property environmental impact statements budgetary estimates cost benefits analysis	Destroy 7 years after action completed
5.1.4 ■■■■■■■■■■	Records documenting the negotiations for other properties where the acquisition was not proceeded with	Destroy 7 years after purchase was suspended
5.1.5 ■■■■■■■■■■	Records documenting the acquisition of goods and services required for the support of the property services function where there is no tender or Contracting out process	Destroy 7 years after action completed

## **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

*For responding to questions from the public on information about available concessions and related services, use PROPERTY SERVICES – Enquiries.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.2.1 ■■■■■■■■■■	Records documenting the receipt and provision of advice relating to the property services function. Includes: advice to other agencies minutes providing advice to the Minister ministerial statements	Destroy 7 years after action completed

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.3.1 ■■■■■■■■■■	Final versions of agreements made to support the property services function. Includes: service contracts	Destroy 7 years after expiry or other termination of agreement
5.3.2 ■■■■■■■■■■	Records documenting negotiations, establishment, maintenance and review of agreements	Destroy 7 years after expiry or other termination of agreement
5.3.3 ■■■■■■■■■■	Records documenting agreements made with property owners relating to easement and right-of-way arrangements	Destroy 7 years after expiry or other termination of agreement

## **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### ***Appeals (decisions)***

The activities involved in the process of appeals against decisions by application to a higher authority.

*For the compulsory acquisition of property, use PROPERTY SERVICES – Acquisition*

*For claims made against the compulsory acquisition of property use, PROPERTY SERVICES – Claims*

*For legal advice and any litigation resulting from compulsory acquisition of property, use LEGAL SERVICES – Advice and Litigation*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.4.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting appeals made against the level of compensation for compulsory acquisition of property	Destroy 10 years after last action

### ***Authorisation***

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.5.1 ■■■■■■■■■■■■■■■■■■■■	Delegations of power to agency staff to authorise administrative action in support of property services	Destroy 10 years after delegation expires or is superseded
5.5.2 ■■■■■■■■■■■■■■■■■■■■	Authorisations for administrative actions in support of property services	Destroy 7 years after authorisation expires or is superseded



## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Claims**

The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury or death or denial of rights of a person or damage to or destruction of property. Includes disputes over rights and ownership and recompense sought for stolen or lost property.

*For compulsory acquisition of property, use PROPERTY SERVICES – Acquisition*

*For appeals made against compensation received for compulsory acquisition of property, use PROPERTY SERVICES – Appeals*

*For legal advice and any litigation resulting from compulsory acquisition of property, use LEGAL SERVICES – Advice and Litigation*

*For insurance policies and annual renewals, use PROPERTY SERVICES - Insurance*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.6.1 ████████████████████	Records documenting claims made against compulsory acquisition of property	Destroy 10 years after finalisation or withdrawal of claim
5.6.2 ████████████████████	Records documenting insurance claims for damage to and/or loss of property	Destroy 7 years after finalisation or withdrawal of claim

## **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

## **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.8.1 ■■■■■■■■■■	Records of internal committees formed to consider specific matters in support of the property services function. Includes: documents establishing the committee final versions of minutes reports recommendations supporting documents such as briefing papers and discussion papers.	Destroy 10 years after action completed
5.8.2 ■■■■■■■■■■	Records of external or inter-agency committees formed to consider property services matters where the agency is a member. Includes: documents establishing the committee appointment of members minutes supporting documents such as briefing papers and discussion papers.	Destroy 5 years after action completed
5.8.3 ■■■■■■■■■■	Working papers documenting the conduct and administration of all committees that consider matters relating to the property services function. Includes: agenda notice of minutes draft of minutes	Destroy after action completed

## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Construction**

The process of making or building something.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.9.1 ■■■■■■■■■■	Records documenting construction activities. Includes: records of consultations with local authorities or transfer to new owners specifications. building plans project management records	Destroy when property is disposed of
5.9.2 ■■■■■■■■■■	Records documenting construction activities not proceeded with. Includes: records of consultations with local authorities specifications building plans project management records	Destroy 7 years after decision to suspend construction activities
5.9.3 ■■■■■■■■■■	Working papers documenting construction activities in support of the property services function.	Destroy when reference ceases

### **Contracting out**

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.7.1 ■■■■■■■■■■	Records documenting contract management that involves significant litigation or complaint	Destroy 15 years after dispute resolved and/or action completed
5.7.2 ■■■■■■■■■■	Records documenting contract management that does not involve significant litigation or complaint	Destroy 7 years after action completed



## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### ***Enquiries***

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.12.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the handling of public enquiries about the agency and its programs, products and services in relation to the property services function	Destroy 2 years after action completed

### ***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 the given situation. Includes systems analysis and ongoing monitoring.

*For re-evaluating processes after implementation, use and monitoring, use PROPERTY SERVICES – Reviewing.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.13.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the evaluation of potential or existing programs and services relating to the property services function.	Destroy 7 years after action completed
5.13.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting systems analysis and ongoing monitoring	Destroy 5 years after action completed

### ***Fit-outs***

The process of establishing or refurbishing a workplace. Includes painting, floor coverings, furnishings, furniture, partitions/walls, fittings and equipment.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.14.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting fit-outs of government owned properties such as public housing stock; community centres, etc.	Destroy 7 years after fit-out completed

## Property Services

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*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*


### Implementation

The activities associated with carrying out or putting into action plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.15.1 	Records documenting the implementation of plans, policies and procedures relating to the property services function.	Destroy 5 years after action completed.



### Installation

The activities involved in placing equipment in position and connecting and adjusting it for use.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.16.1 	Records documenting installation of equipment (eg, heating, plumbing, air-conditioning, security equipment and cabling) in properties. Includes arranging installations and location details, eg, fire panels and alarm panels in government owned properties such as public housing stock, community centres, etc.	Destroy after replacement of equipment or transfer to new owner or lessee of property.

### Insurance

The process of taking out premiums to cover loss or damage to property or premises and to cover customers and staff against injury or death resulting from incidents on the agency's premises or whilst engaged during employment.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.17.1 	Property insurance policies	Destroy 7 years after policy expires.
5.17.2 	Records documenting the annual renewal of property insurance policies.	Destroy 1 year after action completed.

## **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

## **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

*For establishing and maintaining agreements not related to Joint Ventures, use PROPERTY SERVICES – Agreements*

*For collaboration that is not considered a Joint Venture, use PROPERTY SERVICES – Liaison*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.18.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers in support of the establishment, negotiation and management of joint ventures.	Destroy 10 years after action completed
5.18.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting other less important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers supporting the establishment, negotiation and management of joint ventures.	Destroy 7 year after action completed.

## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Leasing**

The activities involved in leasing items, equipment, accommodation, premises or real estate from another agency. Includes the process of chartering.

*For legal advice received on the leasing of property, use LEGAL SERVICES - Advice*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.19.1 ████████████████	Records documenting the leasing of property (i.e. where the agency is the lessee). Includes: space and accommodation assessments negotiations cost-benefit analysis assessments signed leases	Destroy 7 years after lease expires or is terminated.
5.19.2 ████████████████	Records documenting the on-going management of leases.	Destroy 7 years after lease expires or is terminated.

### **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

*For formal advice, use PROPERTY SERVICES – Advice.*

*For collaboration that involves contracts and joint contributions of time and/or funding, use PROPERTY SERVICES – Joint Ventures.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.20.1 ████████████████	Records documenting liaison with professional associations, private sector organisations and community groups. Includes collaboration on projects and exchange of information	Destroy 3 years after action completed.





## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

## **Planning**

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.22.1 ■■■■■■■■■■■■■■■■■■■■	Final version of plans relating to the property services function. Includes: counter disaster plan annual maintenance plan acquisition and disposal plans space usage plans strategic asset management plans	Destroy 6 years after plan is superseded.
5.22.2 ■■■■■■■■■■■■■■■■■■■■	Working papers used in developing all property services function plans. Includes: draft plans reports comments from other areas of the agency	Destroy 1 year after adoption of the final plan.
5.22.3 ■■■■■■■■■■■■■■■■■■■■	Copies of all plans.	Destroy when reference ceases.

## **Property Services**

The function of providing property services to ensure the government’s public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency’s office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Policy**

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation’s operating procedures are determined.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.23.1 ■■■■■■■■■■	Records documenting the development and establishment of the agency’s property services policies Includes: policy proposals research papers results of consultations supporting reports major drafts final policy documents	Destroy 5 years after policy is superseded.
5.23.2 ■■■■■■■■■■	Records documenting comments made on the development of government-wide property services policies property	Destroy 1 year after promulgation of new policy.
5.23.3 ■■■■■■■■■■	Working papers documenting the development of all property services policies.	Destroy 1 year after promulgation of new policy.
5.23.4 ■■■■■■■■■■	Copies of policy documents and supporting papers	Destroy when reference ceases.

### **Procedures**

Standard methods of operating laid down by an organisation according to formulated policy.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.24.1 ■■■■■■■■■■	Master set of agency manuals, handbooks, directives, etc.	Destroy when procedures are superseded.
5.24.2 ■■■■■■■■■■	Records documenting the development of agency procedures supporting the property services function.	Destroy 1 year after production of procedures.
5.24.3 ■■■■■■■■■■	Copies of manuals, handbooks, directives, etc.	Destroy when reference ceases

## **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Property Audits**

The activities involved in officially checking and examining the condition of government owned community facilities such as community centres, community houses, community halls and neighbourhood centres. Includes occupational, health and safety assessments and preparing property condition reports.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.25.1 ■■■■■■■■■■	Records documenting the planning and conduct of audits relating to the property services function. Includes occupational health and safety assessments and property condition reports.	Destroy 7 years after action completed

### **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 the examination or investigation. Includes agenda, briefing, business discussion papers, proposals, reports, reviews and returns.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.26.1 ■■■■■■■■■■	Final version of internal formal reports and reports made to external agencies in relation to the property services function.	Destroy 5 years after action completed.
5.26.2 ■■■■■■■■■■	Final version of periodic internal reports on general administrative matters used to monitor and document recurring activities to support the property services function. Includes the collection and reporting of statistical information	Destroy 3 years after action completed.
5.26.3 ■■■■■■■■■■	Responses to surveys carried out to support the property services function	Destroy 3 years after action completed.
5.26.4 ■■■■■■■■■■	Working papers documenting the development of all reports. Includes drafts and comments received.	Destroy when reference ceases.
5.26.5 ■■■■■■■■■■	Copies of property services reports	Destroy when reference ceases.

## **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

## **Research**

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

*For research into the formulation of policy, use PROPERTY SERVICES – Policy.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.27.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting detailed research carried out to support the property services function.	Destroy 5 years after action completed.
5.27.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting routine research carried out to support the property services function.	Destroy when reference ceases.

## **Reviewing**

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

*For initial evaluation and monitoring, use PROPERTY SERVICES – Evaluation.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
5.28.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting reviews of agency programs and operations in relation to the property services function. Includes: documents establishing the review final report action plan	Destroy 10 years after action completed.
5.28.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting reviews of agency programs and operations in relation to the property services function.	Destroy 3 years after action completed

## Property Services

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.

*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### Standards

The process of implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the agency.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.29.1 ██████████████	Records documenting the implementation of industry and agency standards to support the property services function.	Destroy 7 years after standard is implemented.

### Stock Administration

The activities associated with the counting and valuing of the government's public housing and accommodation portfolio. Includes maintaining an inventory of stock numbers and dwelling types.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.30.1 ██████████████	Records documenting the aggregate of public housing and accommodation kept on hand by the government. Includes stock inventories.	Retain as Territory Archives
5.30.2 ██████████████	Records documenting the valuations of public housing and accommodation. Includes valuation reports.	Destroy 7 years after action completed

### Submissions

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
5.31.1 ██████████████	Final version of agency submissions	Destroy 7 years after action completed
5.31.2 ██████████████	Working papers documenting the development of agency submissions. Includes draft submissions.	Destroy when reference ceases.



## **Tenancy Management**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### **Advice**

The activities associated with offering opinions by or to the agency as to an action or judgement. Includes the process of advising.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
6.1.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the receipt and provision of advice relating to the tenancy management function. Includes: advice to other agencies minutes providing advice to the Minister ministerial statements	Destroy 7 years after action completed

### **Agreements**

The processes associated with the establishment, maintenance, review and negotiation of agreements.

*For Joint Venture agreements, use TENANCY MANAGEMENT – Joint Ventures.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
6.2.1 ■■■■■■■■■■■■■■■■■■■■	Final versions of agreements made to support the tenancy management function. Includes tenancy agreements and service contracts.	Destroy 7 years after expiry or other termination of agreement
6.2.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting negotiations, establishment, maintenance and review of agreements	Destroy 7 years after expiry or other termination of agreement



## **Tenancy Management**

The function of managing the government’s public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency’s office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### **Authorisation**

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
6.3.1 ■■■■■■■■■■■■■■■■■■■■	Delegations of power to agency staff to authorise administrative action in support of tenancy management.	Destroy 10 years after delegation expires or is superseded.
6.3.2 ■■■■■■■■■■■■■■■■■■■■	Authorisations for administrative actions in support of tenancy management.	Destroy 7 years after authorisation expires or is superseded

### **Celebrations**

The activities associated with arranging and managing festivities to honour a particular activity.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
6.4.1 ■■■■■■■■■■■■■■■■■■■■	Programs, invitations, guest lists and photographs relating to festivities held to honour an event of major importance to an agency, eg, a significant anniversary.	Retain as Territory Archives.
6.4.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting routine arrangements supporting celebrations to honour an event of major importance to an agency. Includes catering, venue bookings and entertainment.	Destroy 2 years after action completed.
6.4.3 ■■■■■■■■■■■■■■■■■■■■	Records documenting all arrangements for other celebrations of lesser significance. Includes programs, invitations, guest lists, catering, venue bookings and entertainment.	Destroy 2 years after action completed.

## **Tenancy Management**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### **Committees**

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

*For forums and meetings of individuals or groups that are not considered committees, use TENANCY MANAGEMENT – Meetings.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.5.1 ■■■■■■■■■■	Records of internal committees formed to consider specific matters in support of the tenancy management function. Includes: documents establishing the committee final versions of minutes reports recommendations supporting documents such as briefing papers and discussion papers.	Destroy 10 years after action completed
6.5.2 ■■■■■■■■■■	Records of external or inter-agency committees formed to consider tenancy management matters where the agency is a member. Includes: documents establishing the committee appointment of members minutes supporting documents such as briefing papers and discussion papers.	Destroy 5 years after action completed.
6.5.3 ■■■■■■■■■■	Working papers documenting the conduct and administration of all committees that consider matters relating to the tenancy management function. Includes: agenda notice of minutes draft of minutes	Destroy after action completed

## Tenancy Management

The function of managing the government’s public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency’s office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### Contracting out

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant or by using external bureau services. Includes outsourcing.

*For the process of receiving and assessing tenders from potential external consultants for services prior to the contract agreement, use TENANCY MANAGEMENT – Tendering.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.6.1 ████████████████	Records documenting contract management that involves significant litigation or complaint.	Destroy 15 years after dispute resolved and/or action completed.
6.6.2 ████████████████	Records documenting contract management that does not involve significant litigation or complaint.	Destroy 7 years after action completed.

### Debt Management

The processes involved in managing the recovery of legally recoverable debts such as repayments of rental arrears, sundry debts, prosecution debts through the courts, vacated debts, third party debts, rental bond loans, tenant responsible maintenance, etc.

*For repayment debt agreements, use TENANCY MANAGEMENT - Agreements.*

*For debt management policy, use TENANCY MANAGEMENT - Policy.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.7.1 ████████████████	Records documenting the management and recovery of legally recoverable debts. Includes: debt calculations payment references arrears recovery action transfer of funds forms	Destroy 7 years after debt has been recovered.
6.7.2 ████████████████	Records documenting the management and arrangements for the recovery of legally recoverable debts that are subsequently waived or written off. Includes: debt calculations payment references arrears recovery action	Destroy 7 years after debt has been waived or written off.

## Tenancy Management

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### Enquiries

The activities associated with the handling of requests for information about the organisation and its services by the general public, agency employees or another organisation.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.8.1 ■■■■■■■■■■	Records documenting the handling of public enquiries about the agency and its programs, products and services in relation to the tenancy management function.	Destroy 2 years after action completed

### 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 the given situation. Includes systems analysis and ongoing monitoring.

*For re-evaluating processes after implementation, use and monitoring, use TENANCY MANAGEMENT– Reviewing.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.9.1 ■■■■■■■■■■	Records documenting the evaluation of potential or existing programs and services relating to the tenancy management function.	Destroy 7 years after action completed.
6.9.2 ■■■■■■■■■■	Records documenting systems analysis and ongoing monitoring.	Destroy 5 years after action completed.

### Implementation

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes installation of equipment. Also includes monitoring to ensure the implementation goes according to schedule and that standards are met and includes first aid treatment.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.10.1 ■■■■■■■■■■	Records documenting the implementation of plans, policies and procedures developed to support the tenancy management function.	Destroy 3 years after action completed.

## **Tenancy Management**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### **Inspections**

The process of official examinations of facilities, equipment and items to ensure compliance with agreed standards and objectives.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.11.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting routine inspections of tenanted properties such as houses, flats, bed-sitters, etc. Includes: requests for inspections property condition reports confirmation of undertakings action plans	Destroy 7 years after action completed

### **Joint Ventures**

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

*For formal advisings, use TENANCY MANAGEMENT – Advice*

*For other collaboration between organisations that are not considered Joint Ventures, use TENANCY MANAGEMENT – Liaison*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.12.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers in support of the establishment, negotiation and management of joint ventures.	Destroy 10 years after action completed.
6.12.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting other less important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers supporting the establishment, negotiation and management of joint ventures.	Destroy 7 years after action completed

## **Tenancy Management**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### **Leasing-out**

The activities involved in leasing out items, equipment, accommodation, premises or real estate to another agency or person for a specified period and agreed price. Includes formal documentation setting out conditions, rights, responsibilities, etc of both parties. Also includes subleasing.

*For signed leases and/or tenancy agreements, use TENANCY MANAGEMENT - Agreements.*

*For legal advice received on the leasing-out of public accommodation and housing, use LEGAL SERVICES – Advice.*

*For repairs and maintenance to leased public accommodation and housing, use PROPERTY SERVICES – Maintenance.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.13.1 ████████████████████	Records documenting leasing-out arrangements where the government is lessor. Includes negotiations.	Destroy 7 years after the lease expires or is terminated
6.13.2 ████████████████████	Working papers documenting the on-going management of leases where the government is the lessor.	Destroy 7 years after the lease expires or is terminated

### **Liaison**

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not Joint Ventures.

*For formal advice, use TENANCY MANAGEMENT – Advice.*

*For collaboration that involves contracts and joint contributions of time and/or funding, use TENANCY MANAGEMENT – Joint Ventures.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.14.1 ████████████████████	Records documenting liaison with professional associations, private sector organisations and community groups. Includes collaboration on projects and exchange of information	Destroy 3 years after action completed

## Tenancy Management

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES

For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES

For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT

For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES

For the administration of public housing stock, use PROPERTY SERVICES.

### Meetings

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

For meetings of committees and task forces, use TENANCY MANAGEMENT – Committees.

<i><b>Entry No.</b></i>	<i><b>Description of Records</b></i>	<i><b>Disposal Action</b></i>
6.15.1 ■■■■■■■■■■■■■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held in support of the tenancy management function.	Destroy 3 years after action completed.
6.15.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the conduct and administration of all meetings in support of the tenancy management function.	Destroy after minutes finalised.

### Planning

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<i><b>Entry No.</b></i>	<i><b>Description of Records</b></i>	<i><b>Disposal Action</b></i>
6.16.1 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives
6.16.2 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and have no impact on cross-portfolio administration and/or have no far reaching social and economic implications.	Destroy 6 years after plan superseded
6.16.3 ■■■■■■■■■■■■■■■■■■■■	Working papers created in the development of all plans. Includes: draft plans working reports internal agency comments	Destroy 1 year after adoption of the final plan.

## **Tenancy Management**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### ***Policy***

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making and as the basis from which the organisation's operating procedures are determined.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
6.17.1 ████████████████	Records documenting the development and establishment of the agency's tenancy management policies. Includes: policy proposals research papers results of consultations supporting reports major drafts final policy documents	Destroy 5 years after policy is superseded.
6.17.2 ████████████████	Records documenting comments made on the development of government-wide tenancy management policies.	Destroy 1 year after promulgation of new policy.
6.17.3 ████████████████	Working papers documenting the development of all tenancy management policies.	Destroy 1 year after promulgation of new policy.
6.17.4 ████████████████	Copies of policy documents and supporting papers	Destroy when reference ceases.







## Tenancy Management

The function of managing the government’s public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency’s office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

*For research into the formulation of policy, use TENANCY MANAGEMENT – Policy.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.22.1 ██████████████	Records documenting detailed research carried out to support the tenancy management function.	Destroy 5 years after action completed
6.22.2 ██████████████	Records documenting routine research carried out to support the tenancy management function.	Destroy when reference ceases.

### Reviewing

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

*For evaluation and monitoring of potential or existing programs, equipment, systems or services, use TENANCY MANAGEMENT – Evaluation.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.23.1 ██████████████	Records documenting reviews of agency programs and operations in relation to the tenancy management function. Includes: documents establishing the review final report action plan	Destroy 10 years after action completed
6.23.2 ██████████████	Working papers documenting reviews of agency programs and operations in relation to the tenancy management function.	Destroy 3 years after action completed

## **Tenancy Management**

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### **Submissions**

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.24.1 ■■■■■■■■■■■■■■■■■■■■	Final version of agency submissions.	Destroy 7 years after action completed
6.24.2 ■■■■■■■■■■■■■■■■■■■■	Working papers documenting the development of agency submissions. Includes draft submissions	Destroy when reference ceases

### **Tenancy Register**

The activities involved in recording in a subsidiary register all government owned residencies that are leased out to the community. Includes date of occupation and vacancy, and address of the property.

*For detailed statistics on the public housing stock, use PROPERTY SERVICES – Stock Administration.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.25.1 ■■■■■■■■■■■■■■■■■■■■	Tenancy registers.	Retain as Territory Archives.
6.25.2 ■■■■■■■■■■■■■■■■■■■■	Records documenting tenancy valuations and requests for inclusion on the tenancy register.	Destroy 7 years after action completed

## Tenancy Management

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

## Tendering

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
6.26.1 ████████████████████	Records documenting the development and issue of tender documentation. Includes: statement of requirements request for proposals expression of interest request for tender draft contract	Destroy 7 years after tender process completed.
6.26.2 ████████████████████	Assessment of tenders received against selection criteria. Includes: arrangements for carrying out the assessment process assessment report recommendations final report public notices	Destroy 7 years after tender process completed.
6.26.3 ████████████████████	Records documenting post offer negotiations and due diligence checks.	Destroy 7 years after tender process completed
6.26.4 ████████████████████	Tender register.	Destroy 7 years after last entry
6.26.5 ████████████████████	Signed simple contracts and agreements resulting from tenders and supporting records.	Destroy 7 years after completion or other termination of contract.
6.26.6 ████████████████████	Contract register.	Destroy 7 years after last entry
6.26.7 ████████████████████	Records of unsuccessful tenders or a tender process where there has been no suitable bidder or where the tender process has been discontinued. Includes: submissions notification of outcome reports on debriefing sessions	Destroy 2 years after the tender process completed or decision made not to continue with the tender process

## **CLASSES FOR RETENTION AS TERRITORY ARCHIVES**



## Classes for retention as Territory Archives

### Accommodation Support Services

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*


*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*

*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*

*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### Procedures


Standard methods of operating laid down by an organisation according to formulated policy.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.20.1	Master set of agency manuals, handbooks, directives, etc.	Retain as Territory Archives
		

### Program Development

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

*For determining the suitability of potential or existing programs, use ACCOMMODATION SUPPORT SERVICES – Evaluation.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.21.1	Records documenting the development of programs that have significant far reaching social and economic implications for the community.	Retain as Territory Archives
		



## Classes for retention as Territory Archives

### Accommodation Support Services

The function of providing services to the community and community groups to facilitate access to government and non-government residential accommodation and related support services. Accommodation includes the allocation of public and private rental houses, flats, boarding houses, group homes, hostels, in-home accommodation, and supported transitional accommodation such as emergency or crisis accommodation.

Includes administering funding to community housing organisations, accommodation providers, accommodation support and advisory services, developing legislative and policy frameworks, programs and procedures, and providing strategic advice. Also includes researching accommodation needs, preparing submissions, providing respite services, liaison with community groups and private sector organisations, and managing the performance of external service providers.

*For funding, learning and skills development and recreational and leisure programs for people who have a developmental delay, use COMMUNITY ACCESS SERVICES*

*For making payments to people who receive concessions for a range of essential services such as electricity, water, public transport, etc, use COMMUNITY CONCESSION SERVICES*

*For maintenance of government vehicles, use FLEET MANAGEMENT*

*For preparing responses to questions raised in parliament by Members of Parliament on behalf of their constituents, use GOVERNMENT RELATIONS*


*For acquiring ownership or use of land and activities involved in the repair and upgrade of community centres, halls and houses, use PROPERTY SERVICES*

*For maintaining tenancy agreements and tenancy registers, use TENANCY MANAGEMENT*

### Research



The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

*For market research, use ACCOMMODATION SUPPORT SERVICES – Marketing.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.24.1 	Records documenting detailed research carried out to support the accommodation support services function.	Retain as Territory Archives

### Submissions

The preparation and submissions of a formal statement (eg report, statistics, etc) supporting a case or opinion held by the agency which is submitted to another agency or within the agency, for the purpose of either gain or support.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
1.29.1 	Final version of submissions relating to controversial issues.	Retain as Territory Archives
1.29.2 	Working papers developed of submissions relating to controversial issues.	Retain as Territory Archives

## Classes for retention as Territory Archives

### Community Access Services

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### Joint Ventures

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations and co-research or collaboration between inter-departmental units, departments or organisations.

*For formal advisings, use COMMUNITY ACCESS SERVICES – Advice*

*For other collaboration between organisations that are not considered Joint Ventures, use COMMUNITY ACCESS SERVICES – Liaison*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.11.1 ■■■■■■■■■■	Records documenting important joint venture agreements between the agency and government or non-government organisations. Includes final signed version of agreement and working papers in support of the establishment, negotiation and management of joint ventures.	Retain as Territory Archives

### Planning

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.14.1 ■■■■■■■■■■	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives

### Procedures

Standard methods of operating laid down by an organisation according to formulated policy.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.16.1 ■■■■■■■■■■	Master set of agency manuals, handbooks, directives, etc.	Retain as Territory Archives.

## Classes for retention as Territory Archives

### Community Access Services

The function of providing services that are designed to develop learning and life skills, and provide recreational and leisure pursuits for people in the community who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes establishing agreements, developing programs, policy and procedures, administering funding to external service providers and managing Joint Ventures with public and private sector organisations. Also includes centre-based respite services, providing formal reports and preparing submissions.

*For respite care provided in an individual's own home including group homes use ACCOMMODATION SUPPORT SERVICES.*

*For the appointment of disability services officers use PERSONNEL.*

*For preparing and distributing newsletters use PUBLICATION.*

### Program Development

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

*For determining the suitability of potential or existing programs, use COMMUNITY ACCESS SERVICES – Evaluation.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.17.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting the development of programs that have significant far reaching social and economic implications for the community.	Retain as Territory Archives.

### Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles, etc used to support development of projects, standards, guidelines, etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches, etc.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
2.21.1 ■■■■■■■■■■■■■■■■■■■■	Records documenting detailed research carried out to support the community access services function.	Retain as Territory Archives

## **Classes for retention as Territory Archives**

### **Community Concession Services**

The function of providing services to the community who receive concessions for expenditure on a range of essential services such as electricity, water and sewerage, spectacles, public transport, motor vehicle registration, drivers licenses, etc.

Includes processing applications for expenditure support, responding to enquiries, handling referrals with additional needs to other organisations, conducting periodic circumstance and entitlement reviews and preparing payments of entitlements. Also includes developing policy, procedures and conducting research.

#### ***Planning***

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.15.1 ████████████████	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives

#### ***Program Development***

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

*For determining the suitability of potential or existing programs, use COMMUNITY ACCESS SERVICES – Evaluation.*

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
3.18.1 ████████████████	Records documenting the development of programs that have significant far reaching social and economic implications for the community.	Retain as Territory Archives.

## Classes for retention as Territory Archives

### Health Professional Services

The function of providing health services such as occupational therapy, speech pathology, physiotherapy, social work and clinical psychology, to people who have a range of developmental delays including physical, intellectual, communication and other functional difficulties.

Includes intake and referral services, assessing needs, conducting community consultations and education, providing Consulting Services and in-service training to external organisations. Also includes developing policy, programs and procedures, preparing submissions, managing the performance of external service providers and liaison with other professionals in related fields.


*For the activities associated with applying for and receiving grants from other organisations use FINANCIAL MANAGEMENT - Grant funding.*

*For the activities involved in arranging trips, entitlements and travel itineraries for clinical staff use PERSONNEL - Arrangements.*

*For preparing references for clinical staff use PERSONNEL - Cases.*

#### Planning

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
4.23.1 	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives


#### Program Development

The activities associated with developing programs to meet individual, group and community needs. Includes updating or making amendments to existing programs.

*For developing educational programs, use HEALTH PROFESSIONAL SERVICES – Educating.*

*For determining the suitability of potential or existing programs, use HEALTH PROFESSIONAL SERVICES – Evaluation.*

*For developing training programs for people engaged in the provision of services to people with disabilities, use HEALTH PROFESSIONAL SERVICES – In-Service Training.*

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
4.26.1 	Records documenting the development of programs that have significant far reaching social and economic implications for the community.	Retain as Territory Archives.

## **Classes for retention as Territory Archives**

### **Property Services**

The function of providing property services to ensure the government's public property assets such as community centres, community halls and housing stock are protected and meet acceptable community standards.

Includes conducting property condition audits, occupational health and safety assessments, acquiring land, upgrading existing community facilities, constructing, disposing and obtaining property valuations. Also includes managing the processes involved in submitting development applications, conducting research, issuing and assessing tenders and developing strategic asset management plans.


*For assessing public housing applications, use ACCOMMODATION SUPPORT SERVICES.*

*For the maintenance of the agency's office accommodation, use PROPERTY MANAGEMENT.*

*For inspections of tenanted properties, use TENANCY MANAGEMENT.*

### **Stock Administration**

The activities associated with the counting and valuing of the government's public housing and accommodation portfolio. Includes maintaining an inventory of stock numbers and dwelling types.

<b><i>Entry No.</i></b>	<b><i>Description of Records</i></b>	<b><i>Disposal Action</i></b>
5.29.1 	Records documenting the aggregate of public housing and accommodation kept on hand by the government. Includes stock inventories.	Retain as Territory Archives

## Classes for retention as Territory Archives

### Tenancy Management

The function of managing the government's public residential tenancies. Includes maintaining tenancy agreements and tenancy register, conducting tenancy inspections, managing unpaid monies, developing policies, procedures and guidelines, issuing and assessing tenders and managing the performance of work by external services providers.

*For allocating government, non-government and private residential accommodation and related support services to proposed tenants, use ACCOMMODATION SUPPORT SERVICES*

*For managing lawsuits or legal proceedings between the agency and other parties in a court of law or other tribunal, use LEGAL SERVICES*

*For the fit-out of the agency's office accommodation, use PROPERTY MANAGEMENT*

*For the upkeep, repair or upgrade of government owned community facilities, use PROPERTY SERVICES*

*For the administration of public housing stock, use PROPERTY SERVICES.*

### Celebrations

The activities associated with arranging and managing festivities to honour a particular activity.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.4.1 ■■■■■■■■■■■■■■■■■■■■	Programs, invitations, guest lists and photographs relating to festivities held to honour an event of major importance to an agency, eg, a significant anniversary.	Retain as Territory Archives.

### Planning

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.16.1 ■■■■■■■■■■■■■■■■■■■■	Final version of plans that support key government initiatives and impact on cross-portfolio administration and/or have far reaching social and economic implications.	Retain as Territory Archives

### Tenancy Register

The activities involved in recording in a subsidiary register all government owned residencies that are leased out to the community. Includes date of occupation and vacancy, and address of the property.

*For detailed statistics on the public housing stock, use PROPERTY SERVICES – Stock Administration.*

<b>Entry No.</b>	<b>Description of Records</b>	<b>Disposal Action</b>
6.25.1 ■■■■■■■■■■■■■■■■■■■■	Tenancy registers.	Retain as Territory Archives.