

Department of Health  
Government of Western Australia

RETENTION AND DISPOSAL SCHEDULE  
FOR ADMINISTRATIVE AND FUNCTIONAL RECORDS

2007

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# Department of Health

## 1 Historical Background

The Health Department of WA was established on July 1, 1984 through the amalgamation of the Public Health, Mental Health and Hospital and Allied Services Departments. These three departments were autonomous in their operations. Functions which did not belong within the mission of the new Health Department were identified and both their functions and resources were expropriated. These functions included:

- Intellectually Handicapped
- Occupational Health
- Clean Air
- Noise abatement
- Women's Refuges

Various administrative reforms and internal restructures have occurred over the years since inception of the department, but the centralised records series have remained intact. The most notable initiatives were:

A funder/purchaser/provider model of governance was introduced in 1994.

The Metropolitan Health Services Board (MHSB) was established on 1 July 1997. The Board brought together all publicly funded health services within the metropolitan area under a single authority with the intention of reducing duplication and improving responsiveness and coordination. The MHSB was abolished on 9 March 2001. The MHSB had a separate file series and these files will be sentenced in accordance with this schedule.

A Cosmetic change to the name of the agency to Department of Health was effected on 1 July 2001 following the recommendation of the Machinery of Government Taskforce. The taskforce left specific recommendations for the health portfolio to the Health Administrative Review Committee (HARC) which was established in April 2001 by the Minister for Health.

HARC recommended a new structure for the department be established based on the desirability of a single unified Government health system. The major divisions of the central office that were formed namely: Health Care Division, Corporate and Finance Division and Population Health Division .

Four metropolitan health areas were established, namely East Metropolitan Health Service, North Metropolitan Area Health Service, South Metropolitan Health Service and Women and Children's Health Service.

Following recommendations of the Premiers Functional Review Taskforce in 2002, a Health Reform Committee was formed in March 2003.

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The Health Reform Implementation Taskforce (HRIT) commenced operations in August 2004 with a long long-term vision for the future of health care in Western Australia and embarked on a plan for major health reform. The Department was further restructured into 5 areas, namely North Metropolitan and South Metropolitan Health Services, WA Country Health Services, Women's and Children's Health Service and South West Health Service. Late in 2005, the South West Health Service was merged into the WA Country Health Service.

### **1.1 Strategic Intent 2005 - 2010**

The strategic intent document of the Department of Health 2005 – 2010 outlines key intentions and commitments for the next 5 years to Deliver a Healthy WA.

### **1.2 Our Purpose**

Our purpose is to ensure healthier, longer and better lives for all Western Australians.

### **1.3 Our Vision**

Our vision is to improve and protect the health of Western Australians by providing a safe, high quality, accountable and sustainable health care system. We recognise that this care is achieved through an integrated approach to all components of our health system. These components include workforce, hospitals and infrastructure, partnerships, communities, resources and leadership. We also recognise that WA Health must work with a vast number of groups if it is to achieve the vision of a world class health system.

### **1.4 Major Stakeholders (sample list)**

- Whole of the WA population
- Commonwealth Department of Health and Aged Care
- Private sector hospitals and service providers
- St John Ambulance Association
- Silver Chain Nursing Association
- Royal Flying Doctor Service
- Home and Community Care Service Providers

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- Australian Medical Association
  - Australian Nursing Federation
  - Local Government

### **1.5 Legislation**

- Criminal Code Act 1913
- Dental Act 1939
- Electronic Transactions Act 2003
- Evidence Act 1906
- Financial Administration and Audit Act 1985
- Freedom of Information [FOI] Act 1992
- Health Act 1911
- Hospitals and Health Services Act 1927
- Limitations Act 1935
- Medical Act 1894
- Mental Health Act 1996
- Public Sector Management Act 1994
- State Records Act 2000

### **1.6 Scope**

This schedule applies to all records (as defined in the [\*State Records Act 2000\*](#)) of the Department of Health, regardless of medium and includes information or business systems acquired or built to support all types of business activities. It also applies to the employees of the WA government health sector, ultimately reporting through to the Minister for Health. This includes the Department of Health (DoH) entities, public

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hospitals, public community health services, public pathology laboratories, public health and mental health clinics and services, public nursing homes, DoH contracted services and any other WA government health sector organisational entities.

Those records relating specifically to patient records, general administration, human resources or financial and accounting records may be considered to be out of scope in relation to this schedule. Retention sentences for out of scope records would normally be found within one of the item specific Retention and Disposal Schedules listed below.

- [General Disposal Authority for Administrative Records](#)
- [General Disposal Authority for Financial and Accounting Records](#)
- [General Disposal Authority for Human Resource Management Records](#)
- [Patient Information Retention and Disposal Schedule](#)

### **Guide to Using the Retention and Disposal Schedule**

## **2.0 PURPOSE OF THE SCHEDULE**

This Schedule provides a management tool for the retention and disposal of Department of Health's records, which ensures compliance with legal obligations. Under the terms of the State Records Act 2000, State records may only be destroyed in accordance with an approved record keeping plan. Once approved this schedule will form the retention and disposal component of Department of Health's record keeping plan.

An efficient and effective system of retention and disposal will:

- produce efficiencies in the records system;
- reduce the need for costly primary storage;
- provide the basis for a systematic programme of transfer and destruction;
- destroy records which are of no further value; and
- identify and protect records of continuing value.

## **3.0 STRUCTURE OF THE SCHEDULE**

The structure of the Schedule and terms used are based on a keyword classification scheme. Records are grouped under keyword headings [e.g. CLINICAL SERVICES] and then activity descriptors [e.g. SURGERY] and then subject descriptors [e.g. PLASTIC RECONSTRUCTIVE]

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The headings used in the Schedule are:

- **Reference Number**

A unique sequential reference number for each record type.

- **Description of Records**

Organised by keyword, activity and subject descriptor. Provides a description of the type of record covered within the classification.

- **Disposal Action**

States whether the record is to be archived retained permanently by Department of Health or destroyed, the length of time that the record must be retained within Department of Health before archiving or destruction and the event that marks the start of this retention period e.g. date of last action, completion of the action/activity to which the file relates or completion of contract. Hard copy records that are of archival value must be transferred to the State Records Office. Electronic records of archival value are to be retained by Department of Health in accordance with State Records Office Policy number 8.

If Department of Health should cease to exist and there is no successor agency then the State Records Office will be consulted to determine the disposal action for records marked as 'retain'.

- **Retention by Department of Health**

Divides the total retention period into minimum periods for retention of the records on site at Department of Health. Some inactive records are stored off-site in an [interim] commercial storage facility.

- **Relevant Disposal Authority**

Lists any legislation or authorities produced by the State Records Office that may apply to the records described.

## **4.0 USING THE SCHEDULE**

It is desirable that this schedule is used in conjunction with the Department of Health records management thesaurus as the scope notes explain the context in which the keywords and descriptors are applied in classifying records.

This Schedule replaces the Department of Health (Royal Street Offices) Retention and Disposal Schedule RD92017(as amended) first approved in 1992 This Schedule covers all records held by Department of Health and includes Health Services. It also covers government records created or received by contractors performing any function for Department of Health. The State Records Commission Standard 6 – Outsourcing states that “State Records transferred to the custody of the contractor and those State Records received or created by the contractor during the term of

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the contract - ***remain the property of the State Organisation***. They must be disposed of in accordance with an approved disposal authority.”

#### **4.1 Retention Period**

The Schedule specifies the minimum retention period for each record series before destruction or transfer to the State Records Office. At the end of this period, the records will be reviewed and may be retained by Department of Health for an additional period if required. Records must not be destroyed or transferred before the end of the retention period stated in this Schedule.

#### **4.2 Restricted Access Archives**

Some records for transfer to the State Records Office will require restrictions to access e.g. records relating to the sale of government assets. Details and conditions of these restrictions are specified in the Schedule.

#### **4.3 General Disposal Authorities**

Administrative, Financial and Accounting records and Human Resource management records will be disposed of in accordance with the General Disposal Authority for Administrative Records [GDAA], General Disposal Authority for Finance and Accounting [GDAFA] and General Disposal Authority for Human Resource Management Records [GDAHR].

#### **4.4 Electronic Records**

This Schedule covers paper and electronic records. Unstructured records created in digital format on office desktop packages such as word-processing, spreadsheets, electronic mail and electronic faxes are printed, placed on file and retained in paper format. Structured information held in databases may be kept on-line in the current database or in back up media. The planned introduction of an electronic records and document management system will facilitate capture and storage of unstructured electronic records without the need to maintain paper copies subject to approval by the State Records Office. The management of the numerous databases held across the department and at health services is governed by two policies that form part of the Records Keeping Plan. Namely: Long Term Management of Electronic Records Policy and IT Service Continuity as Related to the Management of Electronic Records Policy. Custodians responsible for migrating records held in databases through time will take into account the relevant retention and disposal authorities set out in this schedule that apply to those records.

#### **4.5 Web Sites**

The content of the Department of Health internet and intranet sites will be managed by a proprietary content management or electronic records management software package. All changes to the content of the websites are to be logged and maintained for as long as they are required providing the capability to recreate the website content at a particular point in time. Adequate audit trails will be maintained.

#### **4.6 Destruction**

##### **Paper Records**

Paper-based records may be destroyed by shredding, pulped by both chemical and/or mechanical methods and then processed for recycling or

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directly processed by trammeling [pelletising]. Incineration is not recommended as a reliable and environmentally sound means of record destruction. Burial or the use of conventional rubbish repositories/council tips must not be used.

## **Electronic Records**

The use of the delete function in software packages is not sufficient to destroy electronic records. De-gauzing is a process, which subjects electronic records and disks to a magnetic field, which scrambles the information to prevent any possible reconstruction. File shredding software is the preferred method of destruction, which renders the information non-retrievable.

## **Authorisation For Destruction or Transfer of Records to The State Records Office**

*Prior to any destruction of physical or electronic records or transfer of records to the SRO, a full and comprehensive list of the records to be destroyed or transferred is to be compiled and authorised by a responsible Director or a Senior Manager.*

## **4.7 Freedom of Information [FOI]**

The *Freedom of Information Act 1992* prescribes rights and procedures for access to documents held by Government organizations. If a request for access under the Act has been lodged, all files relevant to the request, regardless of whether they are due for destruction, must be identified and preserved until action on the request and on any subsequent reviews by the Information Commissioner or the Supreme Court are completed. This applies regardless of whether the records in question are due for destruction. FOI requests that are precedent setting [which are identified as state archives] are to include a copy of the documents that were the subject of the request.

## **4.8 Investigations and Inquiries**

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

## **4.9 Records relating to Aboriginal People**

Premiers Circular No. 2003/02 requires that

“records relating to Indigenous individuals, families or communities which concern any children, indigenous or otherwise, removed from their families for any reason, whether held by government or non-government agencies, be brought to the attention of the family Information Records Bureau (FIRB) and reflected in agency Recordkeeping Plans”

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

Where FIRB advice on the significance of records is consistent with this schedule, the records may be retained and disposed of in accordance with this authority.

Where FIRB advice on significance of records is inconsistent with the provisions of this schedule, the Department must consult with the State Records Office for advice.

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#### **4.10 Aboriginal Cultural Material or Aboriginal Sites**

At this time the Department of Health has not been able to identify any records applicable to Section 76 of the *State Records Act 2000* due to systems and resources constraints . Should this situation change the Department will consult the State Records Office.

#### **4.11 Photographs and Audiovisual Records**

Audiovisual records (including photographs, videotapes, films, discs and audio tapes) are to be treated the same as any other record format and are to be sentenced in accordance with the subject matter to which they relate. The content of audiovisual material must be identifiable; that is the people, places, events and dates depicted in them should be identified as far as possible.

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

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

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

#### **4.12 Duplicates or copies of State Records**

Duplicates or copies of state records are defined as exact copies of original records, that is, where no annotations have been made and where the original record forms part of the organizations record keeping system. Such records may be destroyed once the originals have been captured into the recordkeeping system and where they are no longer needed for reference purposes. Refer to the General Disposal Authority for Administrative records for the retention and disposal of ephemeral records.

#### **4.13 Cessation of Authority**

Should the Department of Health cease operation at some time in the future, at that time responsibilities for outstanding work will fall to some other government agency. Records will be transferred to that agency at that time. For the purposes of this Retention and Disposal Schedule, records that must be held for a statutory period, which extends beyond the life of Department of Health, will be transferred to an appropriate agency at the time of cessation.

### Retention and Disposal Schedule for Administrative and Functional Records

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.00	<b><u>ABORIGINAL HEALTH</u></b> <i>Records related to the function of providing culturally appropriate health care, through promotion, programs, training and education, policy development, evaluation and monitoring that meet the needs of Aboriginals and Torres Strait Islanders. Use this Key word if the record primarily relates to Aboriginal Health issues.</i>					
1.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
1.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
1.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b> records associated with the activities related to the minimisation of the social and health impact of alcohol and other drugs or substance use.	A	Transfer to SRO 5 years after reference ceases	5 years		
1.04	<b>ALLIED HEALTH SERVICES</b> records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to SRO 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
1.06	<b>AUTHORISATION</b> records associated with the process of seeking and granting permission to undertake a requested action.	D	Destroy 7 years after last action	2 years	5 years	
1.07	<b>BED MANAGEMENT SERVICES</b> records associated with the activity of managing the admissions, stays, transfers and discharges by a hospital in respect to available beds in its framework that integrates and coordinates all processes related to these activities.	D	Destroy 7 years after last action	2 years	5 years	
1.08	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record. In view of the sensitivity of Aboriginal health issues and treatment regimes, files for this function and activity will be archived.	A	Transfer to SRO 5 years after reference ceases	5 years		
1.09	<b>CLAIMS MANAGEMENT</b> records associated with the process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property.	D	Destroy 7 years after last action	5 years	2 years	
1.10	<b>CLINICAL PRACTICE MEDICINE</b> records associated with the activities associated with clinical practices and the provision of specialist services which are normally the responsibility of a unit based in a hospital.	A	Transfer to SRO 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.11	<b>COMMITTEES</b> records concerned with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
1.12	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		See General Disposal Authority for Administrative Records plus Financial and Accounting Records			GDAA GDAFA
1.13	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations. Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings   Presented by Health – unpublished proceedings	D  D   A	Destroy 10 years after last action  Destroy 1 year after last action  Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01  Transfer to SRO 5 years after last action	3 years  1 year   5 years	7 years	
1.14	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.15	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA
1.16	<b>COORDINATION</b> records associated with the activity of combining of diverse parts or groups to make a unit, or the way these parts work together.	D	Destroy 7 years after last action	2 years	5 years	
1.17	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to SRO 5 years after reference ceases	5 years		
1.18	<b>COUNSELLING</b> records associated with the activities of giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2years	5 years	
1.19	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.20	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
1.21	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.22	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer to GDAFA			GDAFA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.23	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.24	<b>HEALTH PROMOTION</b> records associated with the activity of promoting healthy lifestyles and awareness and low risk behaviours in the community through strategies such as education, creating healthy and safe environments and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.25	<b>HEALTH PROTECTION</b> records associated with the activity of protecting people's health and reducing the impact of infectious diseases, chemical hazards, poisons and radiation hazards.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.26	<b>IMPLEMENTATION</b> records associated with the activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.27	<b>INFECTION CONTROL</b> records associated with the activities involved with the application of infection protection and sterilisation procedures used in health facilities to protect other patients and staff from infections.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.28	<b>INJURY PREVENTION</b> records associated with the activity of creating programs to prevent injury through a range of strategies including education, creating healthy and safer environments, and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.29	<b>JOINT VENTURES</b> records associated with 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.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.30	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.31	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5 years after last action	2 years	3 years	
1.32	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
1.33	<b>MONITORING</b> Records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
1.34	<b>OUTPATIENT SERVICES</b> records associated with the activities related to services provided to people by the hospital, but are not admitted to hospital.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.35	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities associated with the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.36	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.37	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
1.38	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDA
1.39	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after the system of application has been decommissioned	2 years	5 years	
1.40	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
1.41	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.42	<b>REVIEWING</b> records associated with the activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems.	D	Destroy 10 years after last action	3 years	7 years	
1.43	<b>RISK MANAGEMENT</b> records associated with the process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
1.44	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
1.45	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
2.00	<b><u>ACUTE HEALTH SERVICES</u></b> <i>The function of providing acute and chronic hospital and medical services to those in need. Includes the provision of emergency services and general medical and surgical treatment resulting from illness, disease or accident.</i> <i>The enhancement of health outcomes by providing effective, high quality acute health care and ambulance services which are accessible and relevant to the needs of individuals and local communities.</i> <i>Includes the delivery of operational services across the state for specialised services.</i>					
2.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
2.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
2.03	<b>ALLIED HEALTH SERVICES</b> records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
2.04	<b>AMBULANCE SERVICES</b> records associated with the activities involved in providing metropolitan and rural ambulance services.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
2.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	5 years		
2.06	<b>AUTHORISATION</b> records associated with the process of seeking and granting permission to undertake a requested action.	D	Destroy 7 years after last action	2 years	5 years	
2.07	<b>BED MANAGEMENT SERVICES</b> records associated with the activity of managing the admissions, stays, transfers and discharges by a hospital in respect to available beds in its framework that integrates and coordinates all processes related to these activities.	D	Destroy 7 years after last action	2 years	5 years	
2.08	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	5 years	2 years	
2.09	<b>CLAIMS MANAGEMENT</b> records associated with the process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property.	D	Destroy 7 years after last action	5 years	2 years	
2.10	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
2.11	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		See General Disposal Authority for Administrative Records			GDAA
2.12	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations. Administrative arrangements (eg bookings catering)	D	Destroy 10 years after last action	3 years	7 years	
	Presented by Health - published proceedings	D	Destroy 1 year after last action	1 year		
	Presented by Health – unpublished proceedings	A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 YEARS		
2.13	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
2.14	<b>CONTRACTING OUT</b> records relating to the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA
2.15	<b>COORDINATION</b> records associated with the activity of combining of diverse parts or groups to make a unit, or the way these parts work together.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
2.16	<b>CORONARY CARE</b> records associated with the activity of providing specialist care for patients / clients with serious heart conditions, such as coronary thrombosis.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
2.17	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
2.18	<b>COUNSELLING</b> records associated with the activities of giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2years	5 years	
2.19	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
2.20	<b>INFECTION CONTROL</b> records associated with the activities involved with the application of infection protection and sterilisation procedures used in health facilities to protect other patients and staff from infections.	D	Destroy 10 years after reference ceases	2 years	8 years	
2.21	<b>INPATIENT SERVICES</b> records associated with the activities related to the services provided to people admitted to hospital.	D	Destroy 7 years after last action	2 years	5 years	
2.22	<b>MATERNITY SERVICES</b> records associated with the activities related to public based maternity services providing information about care choices, best practice guidelines for service providers and giving continuum of care for women and their babies prior to, during and following childbirth.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
2.23	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
2.24	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
2.25	<b>OUTPATIENT SERVICES</b> records associated with the activities related to services provided to people by the hospital, but are not admitted to hospital.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
2.26	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
2.27	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
2.28	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDA
2.29	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after the system or application has been decommissioned	2 years	5 years	
2.30	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
2.31	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
2.32	<b>RISK MANAGEMENT</b> records associated with the process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	
2.33	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	
2.34	<b>SUBMISSIONS</b> records associated with the preparation and submission of a formal statement (e.g. report, statistics, etc.) supporting a case or opinion held by the organisation which is submitted to another organisation, or within the organisation, for the purpose of either gain or support.	D	Destroy 7 years after last action	2 years	5 years	
2.35	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
2.36	<b>TRANSPLANT SERVICES</b> records associated with the activity of performing the procedure of arranging for the acquisition, transportation and ready availability of access to any tissue or organ taken from a donor site and transplanted to a recipient site.	R	Retain Permanently within agency			
2.37	<b>WOMEN'S HEALTH SERVICES</b> The activities related to the organised services to provide health care to women. It excludes maternal care services for which maternal health services is available.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.00	<b><u>AGED AND CONTINUING CARE</u></b> <i>The function of providing support services to older people, people with a functional disability and the carers of both groups, with the intention to enhance their independence, community participation and quality of life, either within the community or in residential care.</i>					
3.01	<b>ADVICE</b> -records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
3.02	<b>AGREEMENTS</b> -records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
3.03	<b>ALLIED HEALTH SERVICES</b> -records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to SRO 5 years after reference ceases	5 years		
3.04	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> Records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
3.05	<b>AUTHORISATION</b> records associated with the process of seeking and granting permission to undertake a requested action.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.06	<b>BED MANAGEMENT SERVICES</b> records associated with the activity of managing the admissions, stays, transfers and discharges by a hospital in respect to available beds in its framework that integrates and coordinates all processes related to these activities.	D	Destroy 7 years after last action	2 years	5 years	
3.07	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	
3.08	<b>CLAIMS MANAGEMENT</b> records associated with the process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property.	D	Destroy 7 years after last action	5 years	2 years	
3.09	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
3.10	<b>COMMUNITY HEALTH SERVICES</b> records associated with the activities involved with providing funding for services which support people who are frail aged or have a physical disability to remain in their own home rather than be inappropriately or prematurely placed in a residential care facility.	A	Transfer to SRO 5 years after reference ceases	5 years		
3.11	<b>COMMUNITY NURSING</b> records associated with the activity covering health visiting, district nursing and school nursing.	A	Transfer to SRO 5 years after reference ceases	5 years		
3.12	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.13	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations. Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings  Presented by Health – unpublished proceedings	D  D  A	Destroy 10 years after last action  Destroy 1 year after last action  Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	3 years  1 year  5 years	7 years	
3.14	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
3.15	<b>CONTRACTING OUT</b> records relating to the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDA
3.16	<b>COORDINATION</b> records associated with the activity of combining of diverse parts or groups to make a unit, or the way these parts work together.	D	Destroy 7 years after last action	2 years	5 years	
3.17	<b>COUNSELLING</b> records associated with the activities of giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.18	<b>CRISIS INTERVENTION</b> records associated with the activities related to a brief therapeutic approach which is ameliorative rather than curative of acute psychiatric emergencies.	D	Destroy 10 years after last action	3 years	7 years	
3.19	<b>CRISIS MANAGEMENT</b> records associated with the activities involved in identifying a crisis, planning a response to the crisis and confronting and resolving the crisis.	D	Destroy 10 years after last action	3 years	7 years	
3.20	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
3.21	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
3.22	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last action	3 years	7 years	
3.23	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			GDAFA
3.24	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research. Note: these records do not include individual case files.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.25	<b>HOME AND COMMUNITY CARE (HACC) SERVICES</b> records associated with the activities related to the joint Commonwealth / State government program providing community care services to frail aged people and younger people with disabilities and their carers.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
3.26	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
3.27	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5years after last action	2 years	3 years	
3.28	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA
3.29	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
3.30	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities associated with the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	D	Destroy 7 years after last action	2 years	5 years	
3.31	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.32	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
3.33	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDA
3.34	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after the system of application has been decommissioned	2 years	5 years	
3.35	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
3.36	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
3.37	<b>REVIEWING</b> records associated with the activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems.	D	Destroy 7 years after last action	2 years	5 years	
3.38	<b>RISK MANAGEMENT</b> records associated with the process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
3.39	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
3.40	<b>SOCIAL WORK</b> records associated with the activities involved in the use of community resources, individual case work, or group work to promote the adaptive capacities of individuals in relation to their social and economic environments.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
3.41	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	
3.42	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
4.00	<b><u>ALCOHOL AND DRUG MANAGEMENT</u></b> The function of providing specialist outpatient training and education, assessment, treatment and prevention for adults and young people with withdrawal services and specialist pharmacotherapy service. Includes providing a state-wide clinical consultancy and patient support service for health professionals and pharmacotherapy clients. Includes clinical training for undergraduate and postgraduate health professionals through clinical placements and undertaking clinical research, developing clinical guidelines and demonstrating best practice.					
4.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
4.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
4.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b> records associated with the activities related to the minimisation of the social and health impact of alcohol and other drugs or substance use. Includes programs to control access to drugs, preventative and educational programs, rehabilitation and other treatments for substance use.	A	Transfer to SRO 5 years after reference ceases	5 years		
4.04	<b>ALLIED HEALTH SERVICES</b> records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to SRO 5 years after reference ceases	5 years		
4.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
4.06	<b>AUTHORISATION</b> records associated with the process of seeking and granting permission to undertake a requested action.	D	Destroy 7 years after last action	2 years	5 years	
4.07	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
4.08	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
4.09	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		See General Disposal Authority for Administrative Records			GDAA
4.10	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations. Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings     Presented by Health – unpublished proceedings	D	Destroy 10 years after last action	3 years	7 years	
		D	Destroy 1 year after last action Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01	1 year		
		A	Transfer to SRO 5 years after last action	5 years		
4.11	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
4.12	<b>CONTRACTING OUT</b> records relating to the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDA
4.13	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to SRO 5 years after reference ceases	5 years		
4.14	<b>COUNSELLING</b> records associated with the activities of giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	
4.15	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
4.16	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
4.17	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 7 years after last action	2 years	5 years	
4.18	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			
4.19	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
4.20	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
4.21	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5 years after last action	2 years	3 years	
4.22	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
4.23	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities associated with the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	D	Destroy 7 years after last action	2 years	5 years	
4.24	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
4.25	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
4.26	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after the system of application has been decommissioned	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
4.27	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDAA
4.28	<b>REHABILITATION</b> (patients / clients) records associated with the activities related to the rehabilitation e.g. treatment or treatments designed to facilitate the process of recovery from injury, illness, or disease to as normal a condition as possible, often with the assistance of specialised medical professionals. Not for individual client records.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
4.29	<b>REPORTING</b> records 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.	D	Destroy 5years after last action	2 years	3 years	
4.30	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
4.31	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
4.32	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
5.00	<b><u>CHILD AND YOUTH SERVICES</u></b> The function of planning, delivery and review of child and adolescent based community services. Includes early intervention, protection and support services.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
5.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
5.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
5.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b> records associated with the activities related to the minimisation of the social and health impact of alcohol and other drugs or substance use.	A	Transfer to SRO 5 years after reference ceases	5 years		
5.04	<b>ALLIED HEALTH SERVICES</b> records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to SRO 5 years after reference ceases	5 years		
5.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.					
		D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO 5 years after last action	5 years		
5.06	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
5.07	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
5.08	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.	D	Destroy 10 years after last action	3 years	7 years	
	Administrative arrangements (eg bookings catering)	D	Destroy 1 year after last action	1 year		
	Presented by Health - published proceedings  Presented by Health – unpublished proceedings	A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 years		
5.09	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
5.10	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
5.11	<b>COUNSELING</b> records associated with the activities associated with giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	
5.12	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.13	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
5.14	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last Action	3 years	7 years	
5.15	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			GDAFA
5.16	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.17	<b>HEALTH PROMOTION</b> records associated with the activity of promoting healthy lifestyles and awareness and low risk behaviours in the community through strategies such as education, creating healthy and safe environments and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.17.1	<b>HEALTH PROMOTION – Registration – Creche registers</b>	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
5.18	<b>HOME AND COMMUNITY CARE (HACC) SERVICES</b> records associated with the activities related to the joint Commonwealth / State government program providing community care services to frail aged people and younger people with disabilities and their carers.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.19	<b>INJURY PREVENTION</b> records associated with the activity of creating programs to prevent injury through a range of strategies including education, creating healthy and safer environments, and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.20	<b>LEGISLATION</b> -records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.21	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
5.22	<b>PEDIATRICS</b> records associated with the activities related to the concern with the health of infants, children and adolescents, their growth and development, and their opportunity to achieve full potential as adults.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.23	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.24	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
5.25	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDAA
5.26	<b>REPORTING</b> records 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.	D	Destroy 5years after last action	2 years	3 years	
5.27	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
5.28	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
6.00	<b><u>CLINICAL SERVICES</u></b> <i>The function of developing, implementing and evaluating clinical policy and practice strategies for the delivery of health care services. Includes activities concerned with the examination and treatment of patients pertaining to a clinic or to the bedside; pertaining to or founded on actual observation and treatment of patients as distinguished from theoretical or basic sciences.</i>					
6.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
6.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
6.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action Transfer to SRO 5 years after last action	2 years 5 years	5 years	
6.04	<b>CLINICAL MANAGEMENT</b> records associated with the activities involved in clinical practices relating to the management of specific body systems and common diseases / conditions of these systems.	D	Destroy 25 years after last action	5 years	20 years	
6.05	<b>CLINICAL POLICY</b> records associated with the activity of developing clinical policy and practice strategies for the delivery of health care services.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
6.06	<b>CLINICAL PRACTICE MEDICINE</b> records associated with the activities associated with clinical practices and the provision of specialist services which are normally the responsibility of a unit based in a hospital.	D	Destroy 25 years after reference ceases	5 years	20 years	
6.07	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDA
6.08	<b>CORONARY CARE</b> records associated with the activity of providing specialist care for patients / clients with serious heart conditions, such as coronary thrombosis.	A	Transfer to SRO 5 years after reference ceases	5 years		
6.09	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to SRO 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
6.10	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
6.11	<b>DONATIONS (Organs &amp; Tissue)</b> records associated with the activities related to the removal of specific tissues of the human body from a person who has recently died, or from a living donor, for the purpose of transplanting them into other persons.	R	Retain Permanently in Agency			
6.12	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 Years after last action	3 years	7 years	
6.13	<b>FORENSIC SERVICES</b> records associated with the activities related to the provision of forensic services for medical investigations into causes of death across the state.	D	Destroy 7 years after last action	2 years	5 years	
6.14	<b>GENE TECHNOLOGY MANAGEMENT</b> records associated with the activity of regulating the development, production and use of gene technology.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
6.15	<b>GENERAL PRACTICE</b> records associated with the activity performed by GP's, general practitioners or physicians who care for all types of medical problems, including internal medical, paediatric, obstetrical, and surgical diseases.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
6.16	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
6.17	<b>IMMUNOLOGY</b> records associated with the activities related to the subfield of biology that deals with the study of antigens and the immune process and how humans and higher animals fight off disease.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
6.18	<b>INFECTION CONTROL</b> records associated with the activities involved with the application of infection protection and sterilisation procedures used in health facilities to protect other patients and staff from infections.	D	Destroy 10 years after last action	2 years	8 years	
6.19	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
6.20	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
6.21	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
6.22	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDAA
6.23	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
6.24	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
6.25	<b>SURGERY</b> records associated with the activity performed by medical science that treats disease or injury by operative procedures.	D	Destroy 25 years after reference ceases	5 years	20 years	
6.26	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
6.27	<b>TRANSPLANT SERVICES</b> records associated with the activity of performing the procedure of arranging for the acquisition, transportation and ready availability of access to any tissue or organ taken from a donor site and transplanted to a recipient site.	R	Retain Permanently within agency			
6.28	<b>WOMEN'S HEALTH SERVICES</b> records associated with the activities related to the organised services to provide health care to women.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
7.00	<b><u>COMMUNITY RELATIONS</u></b>  The function of establishing rapport with the community and raising and maintaining the organisation's broad public profile. Includes marketing, advertising, media liaison, exhibitions, celebrations, ceremonies, speeches, official representation at functions and participation in community activities. Also includes relationships with professional bodies and industry, the management of customer services, handling reactions to those services and customer consultation and feedback.					
7.01	<b>ADDRESSES (presentations)</b>  The activity of giving addresses for training and education, professional, community relations or sales purposes. Includes speeches and multi-media presentations.		See General Disposal Authority for Administrative Records			GDAA
7.02	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
7.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b>  Activities relating to the minimisation of the social and health impact of alcohol and other drugs use. Includes programs to control access to drugs, preventative and educational programs, rehabilitation and other treatments for drug use.	A	Transfer to SRO 5 years after reference ceases	5 years		
7.04	<b>ARRANGEMENTS</b>  The activities involved in arranging for a journey or trip. Includes preparing travel itineraries, authorisations, entitlements etc. Also includes arrangements made for the delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space.	D	Destroy 5 years after reference ceases	2 years	3 years	
7.05	<b>CELEBRATIONS</b>  The activities associated with arranging and managing festivities to honor a particular event. See CEREMONIES for formal ceremonial occasions.		See General Disposal Authority for Administrative Records			GDAA
7.06	<b>CEREMONIES</b>  The activities associated with arranging managing a formal act performed for a special occasions.		See General Disposal Authority for Administrative Records			GDAA
7.07	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment. Appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDAA
7.08	<b>COMPLAINTS MANAGEMENT</b>  Is the activity involved in receiving, registering and handling complaints form the public, patients /clients and or carers or relatives of those persons involve in the complaint. It is the goal of complaints management to provide a complaint resolution process to the benefit of the complainant in the event that complaint has validity in as speedy a manner as possible.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
7.09	<b>CONFERENCES</b>  The activities involved in arranging or attending conferences held either by the organisation or by other organisations. Includes registrations, publicity, and reports of participants etc.		See General Disposal Authority for Administrative Records			GDA
7.10	<b>CONTRACTING OUT</b>  The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.		See General Disposal Authority for Administrative Records			GDA
7.11	<b>DONATIONS</b>  The activities associated with managing money, items, artifacts or property donated to the organisation, or by the organisation and or its staff to charities etc. Includes managing unsolicited donations.		See General Disposal Authority for Administrative Records			GDA
7.12	<b>ENQUIRIES</b>  The activities associated with the handling of requests for information about the organisation and its services by the general public, and reporting on energy usage.	<b>D</b>	Destroy 5 years after last entry	2 years	3 years	
7.13	<b>EXHIBITIONS</b>  The activities associated with using organisational material in mounted displays for the purpose of informing or educating the viewer, or promoting the activities, services, projects, or programs of the organisation.		See General Disposal Authority for Administrative Records			GDA
7.14	<b>FUNCTIONS (social)</b>  The process of organising and managing an official or formal social occasion conducted by the organisation to enhance its internal and external relationships, or to promote its services and image.		See General Disposal Authority for Administrative Records			GDA
7.15	<b>GRANT FUNDING</b>  The activities associated with the application for and receipt of grants. Tip: If the organisation is involved in administering the provision of grants to other organisations classify with terms from the organisation's functional thesaurus.		See General Disposal Authority for Financial and Accounting Records			GDAFA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
7.16	<b>GREETINGS</b>  The activities associated with preparing and sending letters of congratulation, appreciation or compliment or condolences. Includes mailing lists for Christmas cards.		See General Disposal Authority for Administrative Records			GDA
7.17	<b>JOINT VENTURES</b>  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.		See General Disposal Authority for Administrative Records			GDA
7.18	<b>LIAISON</b>  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.	D	Destroy 5years after last action	2 years	3 years	
7.19	<b>MARKETING</b>  The process of analysing, creating and selling products and services. Includes market research, sales forecasting, advertising, media releases, promotion, pricing and product evaluation.		Refer to General Disposal Authority for Administrative records			GDA
7.20	<b>MEDIA RELATIONS</b>  The activities with establishing a relationship between the media and the organisation. Includes cultivating media contacts, coordinating access to the media, authorising and issuing press releases and briefings, and organising media interviews.		See General Disposal Authority for Administrative Records			GDA
7.21	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
7.22	<b>PATIENT/CLIENT SERVICES</b>  The activities associated with the planning, monitoring and evaluation of services provided to patients/clients by entities across the health care sector.	D	Destroy 5 years after reference ceases	2 years	3 years	
7.23	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs. See STRATEGIC MANAGEMENT - PLANNING for overall planning to achieve corporate objectives.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
7.24	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined. Add as a descriptor under either a functional or an administrative keyword to document the formulation, research, drafting, reviewing, amending, adoption and implementation of organisational policy eg FLEET MANAGEMENT - POLICY - Private Vehicles.		See General Disposal Authority for Administrative Records			GDAA
7.25	<b>PUBLIC REACTION</b>  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.		See General Disposal Authority for Administrative Records			GDAA
7.26	<b>SUGGESTIONS</b>  The activity of using suggestions from personnel and the public to improve the services and processes of the organisation.		See General Disposal Authority for Administrative Records			GDAA
7.27	<b>VISITS</b>  The activities involved in arranging visits by other organisations, the public and students to the organisation, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by staff to other organisations.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
8.00	<b><u>COMPENSATION</u></b>  The function of providing compensation to personnel and visitors injured while on the organisation's premises. Includes the rehabilitation of injured workers and compensation for damage to property where such damage is claimed as the organisation's responsibility.					
8.01	<b>ACCIDENTS</b>  The activities involved in dealing with mishaps causing injury or damage. Includes damage or injury to the organisation's property or member of staff incurred while coming to, at, or leaving work, or to patients/clients, the general public or visitors whilst on the organisation's premises. Also includes measures to prevent accidents occurring.		See General Disposal Authority for Human Resource Management Records			GDAHRM
8.02	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General disposal Authority for Administrative Records.			GDAA
8.03	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		See General disposal Authority for Administrative Records.			GDAA
8.04	<b>APPEALS (decisions)</b>  The activities involved in the process of appeals against decisions by application to a higher authority.	D	Destroy 10 years after Reference ceases	3 years	7 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
8.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b>  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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO 5 years after last action.	5 years		
8.06	<b>CLAIMS MANAGEMENT</b>  The processes of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, 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.		See General Disposal Authority for Human Resource Management Records			GDAHRM
8.07	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records.			GDAA
8.08	<b>INSURANCE</b>  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 organisation's premises or whilst engaged during employment.		See General Disposal Authority for Financial and Accounting Records			GDAFA
8.09	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records.			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
8.10	<b>REHABILITATION</b>  The activity of managing programs designed to restore the injured worker to the fullest physical, psychological, social, vocational and economic usefulness of which they are capable - consistent with pre-injury status. Includes early intervention with appropriate, adequate and timely services through the use of a Rehabilitation Co-coordinator.		See General Disposal Authority for Human Resources Management Records			GDAHRM
9.00	<b><u>DENTAL HEALTH</u></b>  The function of promoting and improving the oral health of Western Australians, specifically to school children, aged, financially and geographically disadvantaged people and other target groups.					
9.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
9.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
9.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
9.04	<b>AUTHORISATION</b> records associated with the process of seeking and granting permission to undertake a requested action.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
9.05	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	
9.06	<b>CLAIMS MANAGEMENT</b> records associated with the process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property.	D	Destroy 7 years after last action	5 years	2 years	
9.07	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
9.08	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.	D	Destroy 10 years after last action	3 years	7 years	
	Administrative arrangements (eg bookings catering)	D	Destroy 1 year after last action	1 year		
	Presented by Health - published proceedings  Presented by Health – unpublished proceedings	A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
9.09	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
9.10	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDA
9.11	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
9.12	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
9.13	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last action	3 years	7 years	
9.14	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			
9.15	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
9.16	<b>HEALTH PROTECTION</b> records associated with the activity of protecting people's health and reducing the impact of infectious diseases, chemical hazards, poisons and radiation hazards.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
9.17	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
9.18	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5years after last action	2 years	3 years	
9.19	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA
9.20	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities associated with the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	D	Destroy 7 years after last action	2 years	5 years	
9.21	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
9.22	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
9.23	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
9.24	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
9.25	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
9.26	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
10.00	<b><u>ENVIRONMENTAL HEALTH</u></b> The function of controlling, monitoring and alleviating environmental factors which may affect public health. Includes improvements in sanitation, drinking water quality, food safety, disease control, dairy safety, meat safety and radiation. Also includes provision for the prosecution of persons or groups who breach the requirements of any acts or regulations related to controlling, monitoring and alleviating environmental factors which may affect public health. Also addresses the health risks arising from the pressures industrial and / or commercial development places on the physical environment. Also includes the issuing of various licences and authorities, the development of policy and educational initiatives to promote best practice and quality management in respect to environmental matters.					
10.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
10.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDA
10.03	<b>APPROVALS (TOWN PLANNING)</b> records associated with subdivision of land referred to the Department for environmental health approval. Note: State Planning Commission microfilms their master file and retains them permanently.	D	Destroy 7 years after reference ceases	2 years	5 years	
10.04	<b>AUDIT EXTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	5 years  5 years	2 years	
10.05	<b>AUTHORISATION</b> records associated with the process of seeking and granting permission to undertake a requested action.	D	Destroy 7 years after Reference Ceases	2 years	5 years	
10.06	<b>CHEMICAL SAFETY ASSESSMENT</b> records associated with the activities associated with determining toxicology and the effects on public health of the use of agricultural, veterinary and industrial chemicals.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.07	<b>CLAIMS MANAGEMENT</b> records associated with the process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property.	D	Destroy 7 years after last action	5 years	2 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
10.08	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
10.09	<b>DAIRY SAFETY</b> records associated with the activity of providing a preventative public health measure in reducing the probability of food poisoning outbreaks and therefore protection of the integrity of Western Australian dairy products.	D	Destroy 7 years after Reference Ceases	2 years	5 years	
10.10	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.11	<b>DRINKING WATER QUALITY MANAGEMENT</b> records associated with the activity of managing the availability for the continuing supply of quality drinking water in Western Australia.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.12	<b>FOOD SAFETY</b> records associated with the activity of ensuring that the production, transport and sale of food products meets safety and hygiene standards so that it is fit for human consumption.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.13	<b>HAZARD CONTROL</b> records associated with the activities related to the prevention or containment of risks of injury from hazardous incidents and materials.	D	25 years after Last Action	5 years	20 years	
10.14	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.15	<b>INFRINGEMENTS</b> records associated with the activities associated with handling breaches of rules.	D	Destroy 7 years after action completed	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
10.16	<b>INSPECTIONS</b> records associated with the process of official examinations of facilities, equipment and items, to ensure compliance with agreed standards and objectives.	D	Destroy 7 years after last action	5years	2 years	
10.17	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.18	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5 years after last action	2 years	3 years	
10.19	<b>LICENSING</b> records associated with the activity of providing and managing the licensing procedures as defined in legislation as applicable as the responsibility of the authority.	D	Destroy 25 years after last action	5 years	20 years	
10.20	<b>LITIGATION</b> records associated with the activities involved in managing lawsuits or legal proceedings between the agency and other parties.  <b>Legal action</b> – of major public interest/controversy, setting a precedent, or resulting in a major change to organizational policy or procedures  Legal action other than above	A  D	Transfer to the State Records Office 5 years after case completed  Destroy 10 years after action completed or expiry of the statute of limitations, whichever is the later	  3 years	  7 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
10.21	<b>MEAT SAFETY</b> records associated with the activity of monitoring and regulating aspects with regard to the safety of meat products from the point of production [the farm] through the slaughtering, processing and value adding, storage, distribution and final sale of the product to the public.	D	Destroy 7 years after last action	2 years	5 years	
10.22	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA
10.23	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
10.24	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.25	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
10.26	<b>POLLUTION</b> records associated with the activity of managing contamination of the environment by chemicals, refuse and wastes which may result in health problems.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.27	<b>PROSECUTIONS</b> records associated with the activities associated with the carriage of criminal charges and legal proceedings against a person or organisation.	D	Destroy 10 years after action complete	3 years	7 years	
10.28	<b>RADIATION HEALTH</b> records associated with the activity of protecting people from any adverse health effects of either ionising or non-ionising radiation.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
10.29	<b>REHABILITATION (Land / Sites)</b> records associated with the process involved with the conversion of wasteland or contaminated land into land suitable for use of habitation or cultivation.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.30	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
10.31	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
10.32	<b>SANITATION</b> records associated with the activities related to the improvement of sanitary conditions such as drainage and removal of sewage and refuse from buildings.	D	Destroy 7 years after last action	2 years	5 years	
10.33	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	
10.34	<b>WASTE MANAGEMENT</b> records associated with the activities involved in the process of extracting value from waste.	D	Destroy 7 years after last action	2 years	5 years	
10.35	<b>WASTEWATER MANAGEMENT</b> records associated with the process of managing the liquid-borne waste products of domestic, industrial, agricultural and manufacturing activities to minimise any effect on public health.	D	Destroy 7 years after last action	2 years	5 years	
10.36	<b>WATER SUPPLIES</b> records associated with the process of managing the source, means, or process of supplying water (as for a community) usually including reservoirs, tunnels, and pipelines and often the watershed, or underground supply from which the water is ultimately drawn.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
11.00	<b><u>EQUIPMENT AND STORES</u></b>  The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores stocked and used by the organisation. Items of equipment include equipment of various types, implements, tools, machines, plant, furniture and furnishings. For medical equipment use Health Technology. Stores include chemicals, hardware, home ware items, kitchen/cleaning items, medical supplies and stationary.					
11.01	<b>ACQUISITION</b>  The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions. Add the type of acquisition as free text.		See General Disposal Authority for Administrative Records			GDAA
11.02	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
11.03	<b>ALLOCATION</b>  The process of assigning of money, items, or equipment to employees or organisational units.		See General Disposal Authority for Administrative Records			GDAA
11.04	<b>ASSET REGISTER</b>  The activities involved in recording in a subsidiary ledger all fixed assets owned by the organisation. Includes the date of purchase, depreciation expense, written down value as well as stocktaking and auditing notations.		REFER GDAFA			

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
11.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b>  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. Where not resulting in changes to policy or procedures		REFER GDAFA			
11.06	<b>DISPOSAL</b>  The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into low-cost or archival storage. Add what is being disposed of as free text.		See General Disposal Authority for Financial and Accounting Records			GDA FA
11.07	<b>EVALUATION</b>  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 ongoing monitoring.		See General Disposal Authority for Administrative Records			GDAA
11.08	<b>INSTALLATION</b>  Activities involved in placing equipment in position and connecting and adjusting it for use.		Refer GDAA			
11.09	<b>LEASING</b>  The activities involved in leasing items, equipment, accommodation, premises or real estate from another organisation.		Refer GDAA			
11.10	<b>MAINTENANCE</b>  The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
11.11	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
11.12	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
11.13	<b>RISK MANAGEMENT</b>  The activity involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	
11.14	<b>SECURITY</b>  The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.	D	Destroy 7 years after reference ceases	2 years	5 years	
11.15	<b>STOCK TAKE</b>  The activities associated with the examination, counting and valuing of goods in the organisation with the view to reassessing the need for replacing those goods, and to identify missing items and determine the condition of the existing items.		See General Disposal Authority for Financial and Accounting Records			GDA FA
11.16	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		See General Disposal Authority for Financial and Accounting Records			GDA FA
12.00	<b><u>ESTABLISHMENT</u></b>  The function of establishing and changing the organisational structure through establishing and reviewing positions. Includes classification and grading of positions and the preparation of organisational charts.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
12.01	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDA
12.02	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDA
12.03	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
12.04	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
12.05	<b>RESTRUCTURING</b>  The activities involved in the reassessment of the activities, goals and structure of an organisation. Includes consideration of the number of staff, their position, descriptions, equipment, and other resources required to meet objectives.		See General Disposal Authority for Human Resources Management			GDA HRM
12.06	<b>VACANCIES</b>  The activities associated with managing positions in the organisation that are currently unoccupied.		See General Disposal Authority for Human Resources Management			GDA HRM

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
13.00	<b><u>FINANCIAL MANAGEMENT</u></b>  The function of managing the organisation's financial resources. Includes establishing, operating, and maintaining accounting systems, controls and procedures, financial planning, framing budgets and budget submissions, obtaining grants, managing funds in the form of allocations from the Consolidated Fund and revenue from charging, trading and investments. Also includes the monitoring and analysis of assets to assist the delivery of economic and social services to government, industry and the community.					
13.01	<b>ACCOUNTING</b>  The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation. Includes financial statements, and the implementation, maintenance, monitoring and auditing of the organisation's accounting systems and internal controls.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.02	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAFA
13.03	<b>ASSET REGISTER</b>  The activities involved in recording in a subsidiary ledger all fixed assets owned by the organisation. Includes the date of purchase, depreciation expense, written down value as well as stocktaking and auditing notations.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.04	<b>AUDIT EXTERNAL</b>  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.		See General Disposal Authority for Financial and Accounting Records			GDAFA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
13.05	<b>AUDIT INTERNAL</b>  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.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.06	<b>BUDGETING</b>  The process of planning the use of expected income and expenditure over a specified period.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.07	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDAA
13.08	<b>COMPLIANCE</b>  The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as ISO 9000 series.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.09	<b>DONATIONS</b>  The activities associated with managing money, items, artifacts or property donated to the organisation, or by the organisation and or its staff to charities etc. Includes managing unsolicited donations.		See General Disposal Authority for Financial and Accounting Records			GDAFA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
13.10	<b>FINANCIAL STATEMENTS</b>  The process of compiling annual statements presented in prescribed tabular form showing receipts and payments, both actual and budgeted for the current financial year and the actual amounts received or paid for the previous financial year.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.11	<b>GRANT FUNDING</b>  The activities associated with the application for and receipt of grants.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.12	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to The management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDAFA
13.13	<b>PAYMENTS</b>  The activities involved in the preparation and payment of money, except in cases of payment of membership fees and subscriptions to journals etc. Includes payment of staff expenses in attending public service interviews etc.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.14	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.15	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Financial and Accounting Records			GDAFA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
13.16	<b>REPORTING</b>  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.		See General Disposal Authority for Financial and Accounting Records			GDAFA
13.17	<b>SALARIES</b>  The process of managing the payment of salaries to personnel.		See General Disposal Authority for Financial and Accounting Records			GDAFA
14.00	<b><u>FLEET MANAGEMENT</u></b>  The function of acquiring, managing, maintaining, repairing and disposing of vehicles. NOTE: Vehicles are any means of conveyance owned or used by the organisation to transport people or items.					
14.01	<b>ACCIDENTS</b>  The activities involved in dealing with mishaps causing injury or damage.  Includes damage or injury to the organisation's property or member of staff incurred while coming to, at, or leaving work, or to patients/clients, the general public or visitors whilst on the organisation's premises.  Also includes measures to prevent accidents occurring.		Refer to GDAA and GDAFA			
14.02	<b>ACQUISITION</b>  The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions. Add the type of acquisition as free text.		Refer to GDAA and GDAFA			
14.03	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
14.04	<b>ASSET REGISTER</b>  The activities involved in recording in a subsidiary ledger all fixed assets owned by the organisation. Includes the date of purchase, depreciation expense, written down value as well as stocktaking and auditing notations.		Refer General Disposal Authority for Financial and Accounting Records			GDAFA
14.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b>  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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies and procedures or set a precedent, transfer to the SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years	5 years	
14.06	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDAA
14.07	<b>CONTRACTING OUT</b>  The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.		See General Disposal Authority for Administrative Records			GDAA
14.08	<b>DISPOSAL</b>  The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into low-cost or archival storage. Add what is being disposed of as free text.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
14.09	<b>INFRINGEMENTS</b>  The activities associated with handling breaches of rules. Includes driving or traffic infringements of the organisation's intellectual property.		See General Disposal Authority for Administrative Records			GDA
14.10	<b>INSURANCE</b>  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 organisation's premises or whilst engaged during employment.		See General Disposal Authority for Financial and Accounting Records			GDAFA
14.11	<b>LEASING</b>  The activities involved in leasing items, equipment, accommodation, premises or real estate from another organisation.		Refer to GDA and GDAFA			
14.12	<b>MAINTENANCE</b>  The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.		See General Disposal Authority for Administrative Records			GDA
14.13	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDA
14.14	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
14.15	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
14.16	<b>REVIEWING</b>  The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.	D	Destroy 7 years after last action	2 years	5 years	
14.17	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		See General Disposal Authority for Administrative Records			GDAA
15.00	<b><u>GOVERNMENT RELATIONS</u></b>  The function of administering the formal relationship between the organisation and those processes of government not covered by other general administrative or functional keyword. Includes the organisation's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquiries and investigations such as Royal Commissions, and inquiries by Parliamentary Committees and the Ombudsman; and relationships with other Local, State and Commonwealth governments.					
15.01	<b>ADDRESSES (presentations)</b>  The activity of giving addresses for training and education, professional, community relations or sales purposes. Includes speeches and multi-media presentations. Add the title of the address as free text.  Addresses and speeches presented by the Minister or senior officers – master copies and transcripts  Addresses presented by other officers	A          D	Transfer to the State Records Office 5 years after reference ceases      Destroy 5 years after last action	5 years      2 years	      3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
15.02	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			
15.03	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			
15.04	<b>COMPLIANCE</b>  The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as ISO 9000 series.		See General Disposal Authority for Administrative Records			
15.05	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			
15.05	<b>INQUIRIES</b>  The activities associated with liaising with bodies carrying out inquiries, and participating in them. Inquiries are investigations carried out by persons or bodies who have been empowered to inquire and report on a subject, such as Royal Commissions, Parliamentary and Ombudsman's inquiries. Includes the organisation's participation in the inquiry by providing evidence in the form of records, submission or staff.		See General Disposal Authority for Administrative Records			
15.06	<b>LEGISLATION</b>  The process of making laws. Includes Local, State, Commonwealth and overseas Acts, Bills and subsections of Acts and amendments to each.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
15.07	<b>MEETINGS</b> The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			
15.08	<b>POLICY</b> The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			
15.09	<b>REPRESENTATIONS</b> The activities involved in preparing responses to questions raised in Parliament by Members of Parliament on behalf of their constituents. Also includes community-based representations and representations directed to the agency seeking a formal response.		See General Disposal Authority for Administrative Records			
15.10	<b>VISITS</b> The activities involved in arranging visits by other organisations, the public and students to the organisation, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by staff to other organisations.		See General Disposal Authority for Administrative Records			
16.00	<b><u>HEALTH PROFESSIONAL REGISTRATION SERVICES</u></b> The function of registering health professionals, who are entitled to practice medical procedures because they have successfully completed a recognised, accredited course.					
16.01	<b>ACCREDITATION</b> records associated with the activity of accrediting or the state of being accredited, especially the granting of approval to a provider of a particular service by an official review board or relevant authority after the entity has met specific requirements.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
16.02	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO 5 years after last action	5 years		
16.03	<b>CASES</b> records associated with this activity descriptor should be used where there is a need to keep a number of activities together on one file, for legislative or operational reasons. Case files relate to particular incidents, persons, organisations or clients. Case files that do not lead to a change in policy or set a precedent  Where the cases file leads to a change in organisational policy or sets a precedent	D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO 5 years after last action	5 years		
16.04	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
16.05	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.  Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings  Presented by Health – unpublished proceedings	D  D  A	Destroy 10 years after last action  Destroy 1 year after last action  Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	3 years  1 year  5 years	7 years	
16.06	<b>DISCIPLINARY PROCEDURES</b> records associated with the activities and actions associated with the disciplinary process.	D	Destroy 7 years after last action	2 years	5 years	
16.07	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
16.08	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
16.09	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA
16.10	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
16.11	<b>MUTUAL RECOGNITION</b> records associated with the process involved in the recognition of overseas qualification, training and education.	D	Destroy 7 years after the system of application has been decommissioned	2 years	5 years	
16.12	<b>NON REGISTERED PRACTITIONERS</b> records associated with the activities involved with practitioners offering a range of "alternative" health care treatment, who are not required to be registered by the Act.	D	Destroy 7 years after last action	2 years	5 years	
16.13	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
16.14	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
16.15	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDAA
16.16	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
17.00	<b><u>HEALTH SURVEILLANCE AND MONITORING</u></b> The function of ongoing, systematic collection, assembly, analysis and interpretation of population health data and the communication of the information derived from this data to stimulate responses to emerging health problems.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
17.01	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO once reference ceases	5 years		
17.02	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
17.03	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.  Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings  Presented by Health – unpublished proceedings	D	Destroy 10 years after last action	3 years	7 years	
		D	Destroy 1 year after last action	1 year		
		A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
17.04	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
17.05	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
17.06	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last action	3 years	7 years	
17.07	<b>HEALTH PROMOTION</b> records associated with the activity of promoting healthy lifestyles and awareness and low risk behaviours in the community through strategies such as education, creating healthy and safe environments and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
17.08	<b>HEALTH PROTECTION</b> records associated with the activity of protecting people's health and reducing the impact of infectious diseases, chemical hazards, poisons and radiation hazards.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
17.09	<b>HOME AND COMMUNITY CARE (HACC) SERVICES</b> records associated with the activities related to the joint Commonwealth / State government program providing community care services to frail aged people and younger people with disabilities and their carers.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
17.10	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			
17.11	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
17.12	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
17.13	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
18.00	<b><u>HEALTH TECHNOLOGY</u></b> The function of applying comprehensive evaluation and assessment of existing and emerging medical technologies including pharmaceuticals, procedures, services, devices and equipment in regard to their medical, economic, social and ethical effects. Includes using, testing and evaluating new advances in health services delivery, in particular new clinical practices or the use of new technologies until they are accepted as having an established role. Includes the evaluation and assessment of gene technology.					
18.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
18.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
18.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO 5 years after last action	5 years		
18.04	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
18.05	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
18.06	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.  Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings  Presented by Health – unpublished proceedings	D  D  A	Destroy 10 years after last action  Destroy 1 year after last action  Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	3years  1 year  5 years	7 years	
18.07	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA
18.08	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 7 years after last action	2 years	5 years	
18.09	<b>GENE TECHNOLOGY MANAGEMENT</b> records associated with the activity of regulating the development, production and use of gene technology.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
18.10	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
18.11	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	D	Destroy 7 years after last action	2 years	5 years	
18.12	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
18.13	<b>LITIGATION</b> records associated with the activities involved in managing lawsuits or legal proceedings between the agency and other parties. <b>Legal action</b> – of major public interest/controversy, setting a precedent, or resulting in a major change to organizational policy or procedures  Legal action other than above	A  D	Transfer to the State Records Office 5 years after case completed  Destroy 10 years after action completed or expiry of the statute of limitations, whichever is the later	3 years	7 years	
18.14	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
18.15	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
18.16	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
18.17	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		See General Disposal Authority for Administrative Records			GDAA
18.18	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 15 years after the system or application has been decommissioned	5 years	10 years	
18.19	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
18.20	<b>REVIEWING</b> records associated with the activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems.	D	Destroy 7 years after last action	2 years	5 years	
18.21	<b>TENDERING</b> records associated with the activities involved in receiving and assessing tenders.		See General Disposal Authority for Administrative Records			GDAA
19.00	<b><u>HOSPITAL SUPPORT SERVICES</u></b> The function of providing non clinical hospital support services to all hospital wards, other units within the hospital system and a number of external health-related agencies.					
19.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
19.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDA
19.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
19.04	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDA
19.05	<b>CONTRACTING OUT</b> records relating to the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDA
19.06	<b>COORDINATION</b> records associated with the activity of combining of diverse parts or groups to make a unit, or the way these parts work together.	D	Destroy 7 years after last action	2 years	5 years	
19.07	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
19.08	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last action	3 years	7 years	
19.09	<b>IMPLEMENTATION</b> Records associated with the activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven.	D	Destroy 7 years after last action	2 years	5 years	
19.10	<b>INFECTION CONTROL</b> records associated with the activities involved with the application of infection protection and sterilisation procedures used in health facilities to protect other patients and staff from infections.	D	Destroy 10 years after last action	2 years	8 years	
19.11	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5 years after last action	2 years	3 years	
19.12	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
19.13	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities associated with the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	D	Destroy 7 years after last action	2 years	5 years	
19.14	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
19.15	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
19.16	<b>RESOURCING</b> records associated with the activity of providing or receiving resources to or by agencies across the state to ensure the availability of a diverse range of specialised resources to meet particular requirements.	D	Destroy 7 years after last action	2 years	5 years	
19.17	<b>SECURITY</b> The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks	D	Destroy 7 years after last action	2 years	5 years	
20.00	<b><u>INDUSTRIAL RELATIONS</u></b>  The function of establishing formal relations with the organisation's employees and their representatives to achieve a harmonious workplace. Includes negotiations conducted to obtain determinations, agreements or awards, industrial disputes settled within the organisation or by external arbitrator and reports of the state of industrial relations within an organisation.					
20.01	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			GDA A
20.02	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Human Resource Management Records			GDAHRM
20.03	<b>APPEALS (decisions)</b>  The activities involved in the process of appeals against decisions by application to a higher authority.	D	Destroy 10 years after last action	3 years	7 years	
20.04	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDA A

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
20.05	<b>COMPLIANCE</b>  The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as ISO 9000 series.		See General Disposal Authority for Administrative Records			GDA A
20.06	<b>DISPUTES</b>  The process of handling any disagreement pertaining to awards, agreements, demarcation issues, breaches of injunctions, secret ballots etc.		See General Disposal Authority for Human Resource Management Records			GDAHRM
20.07	<b>ENTERPRISE BARGAINING</b>  The process where employees negotiate increased pay or other benefits with their employees in exchange for the implementation of working arrangements that improve the performance of the organisation. Includes the activities associated with establishing and implementing an enterprise agreement.		See General Disposal Authority for Human Resource Management Records			GDAHRM
20.08	<b>GRIEVANCES</b>  The activities associated with the handling and resolution of grievances. Includes handling complaints over perceived discrimination, or those arising over work environment, work organisation or distribution, peers, supervisors or subordinates. Also includes complaints regarding the provision of access to opportunities such as training and education, equipment, promotion, or higher duties/		See General Disposal Authority for Human Resource Management Records			GDAHRM
20.09	<b>INDUSTRIAL ACTION</b>  The activities associated with dealing with a failure or refusal to attend and or perform work in association with a dispute between management and workers. Includes lock-outs, strikes etc.		See General Disposal Authority for Human Resource Management Records			GDAHRM
20.10	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
20.11	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
20.12	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
20.13	<b>SUBMISSIONS</b>  The preparation and submission of a formal statement (e.g. report, statistics, etc) supporting a case or opinion held by the organisation which is submitted to another organisation, or within the organisation, for the purpose of either gain or support.	D	Destroy 7 years after last action	2 years	5 years	
21.00	<b><u>INFORMATION MANAGEMENT</u></b>  The function of managing the organisation's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records.  Also includes the acquisition, control and disposal of library and other information products, items kept for reference purposes and the provision of services to internal and external customers, based on information resources. Data administration, archival records and the handling of Freedom of Information (FOI) requests are also classified under this keyword.					
21.01	<b>ACQUISITION</b>  The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions.		See General Disposal Authority for Administrative Records			GDAA
21.02	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
21.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b>  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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D	Destroy 7 years after last action	2 years	5 years	
		A	Transfer to SRO 5 years after last action	5 years		
21.04	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDAA
21.05	<b>CONTRACTING OUT</b>  The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.		See General Disposal Authority for Administrative Records			GDAA
21.06	<b>CONTROL</b>  The activities associated with creating, maintaining and evaluating control mechanisms. Includes classification, indexing, registration, forms design etc to ensure maximum control over records and recordkeeping systems. Also includes control mechanisms for other information resources and systems.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
21.07	<b>DISASTER RECOVERY MANAGEMENT</b>  Disaster recovery management consists of creating a strategy and planning to protect all of an organisation's assets including people, records, information and data, vital records, and facilities in case a disaster occurs. Some disasters, such as those resulting from faulty wiring or leaky plumbing, can be avoided; others, such as fires, floods and extreme weather conditions, cannot. Disasters can be as minor as a temporary loss of electrical power or as major as a devastating fire, flood or a terrorists bombing of the premises or something between these extremes. Whatever the case, preparing for a disaster before it happens can minimise some of the debilitating effects a disaster can have.	D	Destroy 10 years after last action	3 years	7 years	
21.08	<b>DISPOSAL</b>  The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into low-cost or archival storage. Add what is being disposed of as free text.		See General Disposal Authority for Administrative Records			GDAA
21.09	<b>DISTRIBUTION</b>  The activities associated with disseminating items, correspondence, or publications through sales, deliveries, or other customer services.		See General Disposal Authority for Administrative Records			GDAA
21.10	<b>ENQUIRIES</b>  The activities associated with the handling of requests for information about the organisation and its services by the general public, and reporting on energy usage.		See General Disposal Authority for Administrative Records			GDAA
21.11	<b>IMPLEMENTATION</b>  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 the installation of equipment. Also includes monitoring to ensure that the implementation goes according to schedule and that standards are met.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
21.12	<b>INTELLECTUAL PROPERTY (IP)</b>  The activities involved in managing the agency's intellectual property, both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public under Freedom of Information (FOI) legislation.		See General Disposal Authority for Administrative Records			GDA
21.13	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDA
21.14	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
21.15	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
21.16	<b>PRIVACY</b>  The activities associated with applying the principles of privacy. Includes data protection in relation in privacy. Also includes the process of collection, handling, use and disclosure of records of a private, personal, or confidential nature to maintain that the rights of a living person (or immediate family) are secure from unauthorised disclosure or access to such information.	D	Destroy 7 years after last action	2 years	5 years	
21.17	<b>REPORTING</b>  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.	D	Destroy 5 years after last action	2 years	3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
21.18	<b>RISK MANAGEMENT</b>  The activity involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	
21.19	<b>SECURITY</b>  The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorized access.		Refer General Disposal Authority for Administrative Records			GDAA
21.20	<b>STANDARDS</b>  The process of implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the organisation.	D	Destroy 7 years after last action	2 years	5 years	
21.21	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		See General Disposal Authority for Administrative Records			
21.22	<b>TRAINING AND EDUCATION</b>  The activity of encouraging staff and patients/clients to develop their skills and abilities (through activities, programs & events) to maximise their potential and increase productivity. Includes identifying and implementing all aspects of training and education needs and programs (internal and external) available to staff, clients and patients.	D	Destroy 7 years after last action	2 years	5 years	
22.00	<b><u>LEGAL SERVICES</u></b>  The function of providing legal services to the organisation. Includes the interpretation and provision of advice to the organisation regarding legal matters, the drawing up of legal agreements and the handling of legal actions and disputes. Also includes legal advice received from in-house consultants and external sources including the State Solicitor's Office.					
22.01	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
22.02	<b>AGREEMENTS</b>  The processes associated with the establishment, maintenance, review and negotiation of agreements.		Refer to General Disposal Authority for Administrative records			GDAA
22.03	<b>CLAIMS MANAGEMENT</b>  The processes of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, 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.	D	Destroy 7 years after last action	5 years	2 years	
22.04	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		Refer to General Disposal Authority for Administrative records			
22.05	<b>INQUIRIES</b>  The activities associated with liaising with bodies carrying out inquiries, and participating in them. Inquiries are investigations carried out by persons or bodies who have been empowered to inquire and report on a subject, such as Royal Commissions, Parliamentary and Ombudsman's inquiries. Includes the organisation's participation in the inquiry by providing evidence in the form of records, submission or staff.	A	Transfer to State Records Office 5 years after Reference ceases			
22.06	<b>INTELLECTUAL PROPERTY (IP)</b>  The activities involved in managing the agency's intellectual property, both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public under Freedom of Information (FOI) legislation.	D	Destroy 7 years after copyright expires	2 years	5 years	
22.07	<b>LITIGATION</b>  The activities involved in managing lawsuits or legal proceedings between the agency and other parties.		Refer to General Disposal Authority for Administrative records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
22.08	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer to General Disposal Authority for Administrative records			GDAA
22.09	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer to General Disposal Authority for Administrative records			
22.10	<b>PROSECUTIONS</b> The activities associated with the carriage of criminal or civil charges and legal proceedings against a person or organisation.	D	Destroy 10 years after action complete	3 years	7 years	
23.00	<b><u>MEDICINES AND POISONS MANAGEMENT</u></b>  The function of regulating the packaging, labelling, storage, distribution and supply (including prescribing) of drugs, medicines and poisons. Includes the regulation of the disposal of any, out of date or deteriorated stocks.  Also includes the issuing of various licences and authorities, the development of policy and educational initiatives to promote best practice and quality use of medicines, and where necessary initiating prosecutions or professional disciplinary proceedings.  The conducting of investigations, providing licenses for use and research of medicines and poisons and promoting professional standards of practice.					
23.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
23.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDA
23.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO once reference ceases	2 years  5 years	5 years	
23.04	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDA
23.05	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
23.06	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.  Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings  Presented by Health – unpublished proceedings	D	Destroy 10 years after last action	3 years	7 years	
		D	Destroy 1 year after last action Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01	1 year		
		A	Transfer to SRO 5 years after last action	5 years		
23.07	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA
23.08	<b>DISPOSAL (waste material)</b> records associated with the activities related to the processing and or removal to final resting place or transfer to a place for re-use or recovering of waste material.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
23.09	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
23.10	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 7 years after last action	2 years	5years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
23.11	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			GDAFA
23.12	<b>INFRINGEMENTS</b> records associated with the activities associated with handling breaches of rules.	D	Destroy 7 years after action completed	2 years	5 years	
23.13	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
23.14	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
23.15	<b>LICENSING</b> records associated with the activity of providing and managing the licensing procedures as defined in legislation as applicable as the responsibility of the authority.	D	Destroy 7 years after last action	2 years	5 years	
23.16	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
23.17	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
23.18	<b>PROSECUTIONS</b> records associated with the activities associated with the carriage of criminal charges and legal proceedings against a person or organisation.	D	Destroy 10 years after action complete	3 years	7 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
23.19	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
23.20	<b>RISK MANAGEMENT</b> records associated with the process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	
23.21	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	
23.22	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
24.00	<b><u>MENTAL HEALTH</u></b> The function of providing a culturally appropriate and innovative mental health service and treatment for people with psychiatric illness. Includes a focus on promotion and prevention and the planning, funding and reviewing of specialist mental health services for children, adults and older people who have or are at risk of having a serious mental illness.					
24.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
24.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
24.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b> records associated with the activities related to the minimisation of the social and health impact of alcohol and other drugs or substance use.	A	Transfer to State Records Office 5 years after reference ceases			
24.04	<b>ALLIED HEALTH SERVICES</b> records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to State Records Office 5 years after reference ceases			
24.05	<b>APPEALS (decisions)</b> records associated with the activities involved in the process of appeals against decisions by application to a higher authority.	D	Destroy 10 years after reference ceases	3 years	7 years	
24.06	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
24.07	<b>CASE MANAGEMENT</b> records associated with the activities involved with the collaborative consultations between patients / clients and interested stakeholders at a policy level to plan, manage and review individual needs to ensure effective use of resources. Note: records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	
24.08	<b>CLAIMS MANAGEMENT</b> records associated with the process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property.	D	Destroy 7 years after last action	5 years	2 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
24.09	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
24.10	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.	D	Destroy 10 years after last action	3 years	7 years	
	Administrative arrangements (eg bookings catering)	D	Destroy 1 year after last action	1 year		
	Presented by Health - published proceedings  Presented by Health – unpublished proceedings	A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 years		
24.11	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
24.12	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
24.13	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to State Records Office 5 years after reference ceases			
24.14	<b>COUNSELLING</b> records associated with the activities of giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	7 years	
24.15	<b>CRISIS INTERVENTION</b> records associated with the activities related to a brief therapeutic approach which is ameliorative rather than curative of acute psychiatric emergencies.	A	Transfer to State Records Office 5 years after reference ceases			
24.16	<b>CRISIS MANAGEMENT</b> records associated with the activities involved in identifying a crisis, planning a response to the crisis and confronting and resolving the crisis.	A	Transfer to State Records Office 5 years after reference ceases			
24.17	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
24.18	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
24.19	<b>FORENSIC SERVICES</b> records associated with the activities related to the provision of forensic services for medical investigations into causes of death across the state.	A	Transfer to State Records Office 5 years after reference ceases			
24.20	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			GDAFA
24.21	<b>INPATIENT SERVICES</b> records associated with the activities related to the services provided to people admitted to hospital.	A	Transfer to State Records Office 5 years after reference ceases			

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
24.22	<b>JOINT VENTURES</b> records associated with 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.		See General Disposal Authority for Administrative Records			
24.23	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
24.24	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
24.25	<b>OUTPATIENT SERVICES</b> records associated with the activities related to services provided to people by the hospital, but are not admitted to hospital.	A	Transfer to State Records Office 5 years after reference ceases			
24.26	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities regarding the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	D	Destroy 7 years after last action	2 years	5 years	
24.27	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
24.28	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
24.29	<b>PSYCHIATRY</b> records associated with the activities involved with the medical specialty concerned with the diagnosis and treatment of mental disorders.	A	Transfer to State Records Office 5 years after reference ceases			
24.30	<b>PSYCHIATRIC NURSING</b> records associated with the activities concerned with the application of psychiatric principles in caring for the mentally ill.	A	Transfer to State Records Office 5 years after reference ceases			
24.31	<b>PSYCHOLOGY</b> records associated with the activities related to the collection of academic, clinical and industrial disciplines concerned with the explanation and prediction of behaviour, thought-processes, emotions, motivations, relationships, potentials and pathologies.	A	Transfer to State Records Office 5 years after reference ceases			
24.32	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
24.33	<b>REHABILITATION (patients / clients)</b> records associated with the activities related to the rehabilitation e.g. treatment or treatments designed to facilitate the process of recovery from injury, illness, or disease to as normal a condition as possible, often with the assistance of specialised medical professionals.	A	Transfer to State Records Office 5 years after reference ceases			
24.34	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
24.35	<b>SOCIAL WORK</b> records associated with the activities involved in the use of community resources, individual case work, or group work to promote the adaptive capacities of individuals in relation to their social and economic environments.	D	Destroy 7 years after last action	2 years	5 years	
24.36	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
25.00	<b><u>NURSING</u></b> The function of providing nursing services and patient care at public hospitals, community health services and remote communities.					
25.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDA
25.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDA
25.03	<b>ALLOWANCES</b> records associated with the activities involved in arranging and managing money paid to employees in addition to salary to cover expenses incurred in the course of employment, e.g. travelling allowances.		See General Disposal Authority for Human Resource Management			GDA Human Resource Management Records
25.04	<b>APPEALS (decisions)</b> records associated with the activities involved in the process of appeals against decisions by application to a higher authority.	D	Destroy 7 years after last action	2 years	5 years	
25.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
25.06	<b>BED MANAGEMENT SERVICES</b> records associated with the activity of managing the admissions, stays, transfers and discharges by a hospital in respect to available beds in its framework that integrates and coordinates all processes related to these activities.	D	Destroy 7 years after last action	2 years	5 years	
25.07	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
25.08	<b>COMMUNITY NURSING</b> records associated with the activity covering health visiting, district nursing and school nursing.	D	Destroy 7 years after last action	2 years	5 years	
25.09	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations.	D	Destroy 10 years after last action	3 years	7 years	
	Administrative arrangements (eg bookings catering)	D	Destroy 1 year after last action	1 year		
	Presented by Health - published proceedings  Presented by Health – unpublished proceedings	A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 years		
25.10	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
25.11	<b>CORRECTIONS / PRISONS HEALTH SERVICE</b> records associated with the activities related to provision of health care service to prisons and correctional institutions.	A	Transfer to the State Records office 5 years after reference ceases	5 years		
25.12	<b>COUNSELLING</b> records associated with the activities of giving advice, guidance or assistance to an employee, patient or client for various reasons and to assist with particular situations or issues. Note records about individual patients should form part of their medical record.	D	Destroy 7 years after last action	2 years	5 years	
25.13	<b>DISCIPLINARY PROCEDURES</b> records associated with the activities and actions associated with the disciplinary process.		See Discipline in the General Disposal Authority for Human Resource Management Records			GDA Human Resource Management Records
25.14	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
25.15	<b>EMPLOYMENT CONDITIONS</b> records associated with the activities associated with managing the general conditions of employment for personnel.		See General Disposal Authority for Human Resource Management Records			GDA Human Resource Management Records
25.16	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	
25.17	<b>GRIEVANCES</b> records associated with the activities associated with the handling and resolution of grievances.		See General Disposal Authority for Human Resource Management Records			GDAHRM

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
25.18	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	D	Destroy 7 years after last action	2 years	5 years	
25.19	<b>INJURY PREVENTION</b> records associated with the activity of creating programs to prevent injury through a range of strategies including education, creating healthy and safer environments, and public health policies.	D	Destroy 7 years after last action	2 years	5 years	
25.20	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
25.21	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5 years after last action	2 years	3 years	
25.22	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
25.23	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
25.24	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
25.25	<b>SUBMISSIONS</b> records associated with the preparation and submission of a formal statement (e.g. report, statistics, etc.) supporting a case or opinion held by the organisation which is submitted to another organisation, or within the organisation, for the purpose of either gain or support.	D	Destroy 7 years after last action	2 years	5 years	
25.26	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
25.27	<b>TRANSPLANT SERVICES</b> records associated with the activity of performing the procedure of arranging for the acquisition, transportation and ready availability of access to any tissue or organ taken from a donor site and transplanted to a recipient site.	R	Retain Permanently			
26.00	<b><u>OCCUPATIONAL SAFETY AND HEALTH (OS&amp;H)</u></b>  The function of implementing and coordinating occupational safety and health and associated legislation throughout the organisation. Includes safety policy and the monitoring of safe work practices, procedures and preventative measures. Includes the establishment of committees to investigate and advise on safety and health issues in the workplace.					
26.01	<b>ACCIDENTS</b>  The activities involved in dealing with mishaps causing injury or damage. Includes damage or injury to the organisation's property or member of staff incurred while coming to, at, or leaving work, or to patients/clients, the general public or visitors whilst on the organisation's premises. Also includes measures to prevent accidents occurring.		Refer to General Disposal Authority for Human Resource Management Records			GDA HRM
26.02	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
26.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b>  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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
26.04	<b>CLAIMS MANAGEMENT</b>  The processes of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, 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.	D	Destroy 50 years after action completed	5 years	45 years	
26.05	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		Refer to General Disposal Authority for Human Resource Management Records			GDHRM
26.06	<b>COMPLIANCE</b>  The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as ISO 9000 series.		Refer to General Disposal Authority for Administrative Records			GDA
26.07	<b>INJURY PREVENTION</b>  The activity of creating programs to prevent injury through a range of strategies including education, creating healthy and safer environments, and public health policies.	A	Transfer to SRO 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
26.08	<b>INSPECTIONS</b>  The process of official examinations of facilities, equipment and items, to ensure compliance with agreed standards and objectives. Add the name of the body undertaking the inspection.		Refer to General Disposal Authority for Human Resource Management Records			GDAHRM
26.09	<b>LEGISLATION</b>  The process of making laws. Includes Local, State, Commonwealth and overseas Acts, Bills and subsections of Acts and amendments to each.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
26.10	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer to General Disposal Authority for Administrative Records			GDAA
26.11	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
26.12	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer to General Disposal Authority for Human Resource Management Records			GDAHRM
26.13	<b>REPRESENTATIVES</b>  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 boards, organisations, offices, unions, workers participation committees, councils or groups. Includes organisational legal representatives.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
26.14	<b>RISK MANAGEMENT</b>  The activity involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.		Refer General Disposal Authority for Human Resource Management Records			GDAHRM
27.00	<b><u>PATHOLOGY AND LABORATORY SERVICES</u></b>  The function of providing routine pathology services to clients. Includes details on requests, contracts, results, enquires and referred work from or to other laboratories.					
27.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
27.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
27.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
27.04	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
27.05	<b>COMPLIANCE</b> records associated with the activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject.		See General Disposal Authority for Administrative Records			GDAA
27.06	<b>CONFERENCES</b> records associated with the activities involved in arranging or attending conferences held either by the organisation or by other organisations. Administrative arrangements (eg bookings catering)  Presented by Health - published proceedings  Presented by Health – unpublished proceedings	D	Destroy 10 years after last action	3 years	7 years	
		D	Destroy 1 year after last action	1 year		
		A	Lodge 4 copies with JS Battye Library of West Australian History as per Premiers Circular 8/01 Transfer to SRO 5 years after last action	5 years		
27.07	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
27.08	<b>DISPOSAL (waste material)</b> records associated with the activities related to the processing and or removal to final resting place or transfer to a place for re-use or recovering of waste material.	D	Destroy 7 years after last action	2 years	5 years	
27.09	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
27.10	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last action	3 years	7 years	
27.11	<b>FORENSIC SERVICES</b> records associated with the activities related to the provision of forensic services for medical investigations into causes of death across the state.	D		75 years after last action		Consult with Department of the Attorney General before destruction
27.12	<b>GRANT FUNDING</b> records associated with the activities associated with the application for and receipt of grants.		Refer GDAFA			GDAFA
27.13	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	D	Destroy 7 years after last action	2 years	5 years	
27.14	<b>IMMUNOLOGY</b> records associated with the activities related to the subfield of biology that deals with the study of antigens and the immune process and how humans and higher animals fight off disease.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
27.15	<b>IMPLEMENTATION</b> records associated with the activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven.	D	Destroy 7 years after last action	2 years	5 years	
27.16	<b>JOINT VENTURES</b> records associated with 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.		See General Disposal Authority for Administrative Records			GDAA
27.17	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
27.18	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5 years after last action	2 years	3 years	
27.19	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
27.20	<b>PATIENT / CLIENT SERVICE</b> records associated with the activities associated with the planning, monitoring and evaluation of services provided to patients / clients by entities across the health care sector.	D	Destroy 7 years after last action	2 years	5 years	
27.21	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
27.22	<b>PRODUCTION</b>  The process involved in producing material into an end result or output e.g. a product or publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.	D	Destroy 7 years after last action	2 years	5 years	
27.23	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
27.24	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after the system of application has been decommissioned	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
27.25	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
27.26	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
27.27	<b>REVIEWING</b> records associated with the activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems.	D	Destroy 7 years after last action	2 years	5 years	
27.28	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	
27.29	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
28.00	<b><u>PERSONNEL</u></b>  The function of managing all employees in the organisation. Employees include Ministerial, permanent, temporary and part-time employees, people working under scholarships, traineeships, apprenticeships and similar relationships. Includes appeals, overtime, salaries, superannuation and working hours when related to persons rather than to Industrial Relations. Also includes arrangements for staff travel and the provision of housing or living accommodations and childcare by the agency.					
28.01	<b>ADVICE</b>  The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
28.02	<b>ALLOWANCES</b>  The activities involved in arranging and managing money paid to employees in addition to salary to cover expenses incurred in the course of employment, e.g. traveling allowances.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.03	<b>APPEALS (decisions)</b>  The activities involved in the process of appeals against decisions by application to a higher authority.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.04	<b>ARRANGEMENTS</b>  The activities involved in arranging for a journey or trip. Includes preparing travel itineraries, authorisations, entitlements etc. Also includes arrangements made for the delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space.	D	Destroy 7 years after last action	2 years	5 years	
28.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b>  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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies and procedures or set a precedent, transfer to the SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5years after last action			
28.06	<b>AUTHORISATION</b>  The process of seeking and granting permission to undertake a requested action.		Refer GDAHRM			GDAHRM

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
28.07	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDA
28.08	<b>COMPLIANCE</b>  The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as ISO 9000 series.		See General Disposal Authority for Administrative Records			GDA
28.09	<b>CONTRACTING OUT</b>  The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.		See General Disposal Authority for Administrative Records			GDA
28.10	<b>COUNSELLING</b>  records associated with the activities of giving advice, guidance or assistance to an employee, patient group or client for various reasons and to assist with particular situations or issues. Note: records about individual patients should form part of their medical record.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.11	<b>DISCIPLINARY PROCEDURES</b>  Discipline taken against health practitioners for breaches of practice or conduct, misuses of drugs or other activities which are not acceptable to the Board.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.12	<b>EMPLOYMENT CONDITIONS</b>  The activities associated with managing the general conditions of employment for personnel.		Refer General Disposal Authority for Human Management Records			GDAHRM

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
28.13	<b>GRIEVANCES</b>  The activities associated with the handling and resolution of grievances. Includes handling complaints over perceived discrimination, or those arising over work environment, work organisation or distribution, peers, supervisors or subordinates. Also includes complaints regarding the provision of access to opportunities such as training and education, equipment, Promotion, or higher duties/		Refer General Disposal Authority for Human Management Records			GDAHRM
28.14	<b>INSURANCE</b>  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 organisation's premises or whilst engaged during employment.		See General Disposal Authority for Financial and Accounting Records			GDAFA
28.15	<b>LEAVE</b>  The process of administering leave for which staff are eligible. Includes unauthorised leave taken by staff. Add the type of leave as free text if required.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.16	<b>LIAISON</b>  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.	D	Destroy 5years after last action	2 years	3 years	
28.17	<b>MARKETING</b>  The process of analysing, creating and selling products and services. Includes market research, sales forecasting, advertising, media releases, promotion, pricing and product evaluation.	D	Destroy 7 years after last action	2 years	5 years	
28.18	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
28.19	<b>PERFORMANCE MANAGEMENT</b>  The process of identifying, evaluating and developing corporate and employee work performance so that the organisation's goals and objectives are achieved and also benefiting employees through recognition, performance feedback, catering for work needs and offering career guidance.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.20	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
28.21	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
28.22	<b>RECRUITMENT</b>  The process of recruiting which includes applying for approval to fill existing vacancies, the advertising of vacant positions in the Public Service Notices, and the handling of applications, interviews, selection, culling and appointment. Also includes recruiting volunteers.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.23	<b>SALARIES</b>  The process of managing the payment of salaries to personnel.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.24	<b>SECURITY</b>  The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
28.25	<b>SEPARATIONS</b>  The activities associated with managing any method of leaving an organisation. Includes resignation, retirement, dismissal, death, redundancy, retrenchment and dispensations of services of temporary personnel. Excludes transfers.		Refer General Disposal Authority for Human Management Records			GDAHRM
28.26	<b>SOCIAL CLUBS</b>  The activities involved in the organisation's relationships with social clubs.	D	Destroy 7 years after last action	2 years	5 years	
28.27	<b>SUGGESTIONS</b>  The activity of using suggestions from personnel and the public to improve the services and processes of the organisation.	D	Destroy 7 years after last action	2 years	5 years	
29.00	<b><u>PRIMARY HEALTH CARE</u></b>  The function of providing the first and most frequent point of contact with the health system for the public. This point of contact plays a key role in intervening to prevent the onset of serious illness or to slow the progress of chronic illness or disability. The provision of an appropriate and comprehensive primary health care service which includes clinical and preventative care and promotes healthy community attitudes, environments and lifestyles.  In urban areas the assessment, prevention, early intervention and treatment services are provided by general practitioners, retail pharmacists and community health centre staff.  In remote areas, such as remote Aboriginal communities and outstations, residents of small towns, widely dispersed pastoral properties and remote based industries such as mining and tourism, most primary health services are provided through community health clinics staffed by Aboriginal health workers and nurses assisted by visiting medical and allied health staff.					
29.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
29.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
29.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b> records associated with the activities related to the minimisation of the social and health impact of alcohol and other drugs or substance use.	A	Transfer to State Records office 5 years after reference ceases	5 years		
29.04	<b>ALLIED HEALTH SERVICES</b> records associated with the activities which include those occupational groups which provide clinical and other specialised services to support the primary role of the medical practitioner in the management of patients.	A	Transfer to State Records office 5 years after reference ceases	5 years		
29.05	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
29.06	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
29.07	<b>DISEASE PREVENTION AND CONTROL</b> The activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes. Includes measures used to prevent a disease or reduce its severity. Includes training and education for the prevention of disease and infections.	A	Transfer to State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
29.08	<b>EVALUATION</b> The activities 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.	D	Destroy 7 years after last action	2 years	5 years	
29.09	<b>HEALTH PROMOTION</b> records associated with the activity of promoting healthy lifestyles and awareness and low risk behaviors in the community through strategies such as education, creating healthy and safe environments and public health policies.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
29.10	<b>HEALTH PROTECTION</b> records associated with the activity of protecting people's health and reducing the impact of infectious diseases, chemical hazards, poisons and radiation hazards.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
29.11	<b>INFECTION CONTROL</b> records associated with the activities involved with the application of infection protection and sterilisation procedures used in health facilities to protect other patients and staff from infections.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
29.12	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
29.13	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA
29.14	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
29.15	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
29.16	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA
29.17	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after last action	2 years	5 years	
29.18	<b>REHABILITATION (patients / clients)</b> records associated with the activities related to the rehabilitation e.g. treatment or treatments designed to facilitate the process of recovery from injury, illness, or disease to as normal a condition as possible, often with the assistance of specialised medical professionals.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
29.19	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
29.19	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
29.20	<b>SUBMISSIONS</b> records associated with the preparation and submission of a formal statement (e.g. report, statistics, etc.) supporting a case or opinion held by the organisation which is submitted to another organisation, or within the organisation, for the purpose of either gain or support.	D	Destroy 7 years after last action	2 years	5 years	
29.21	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
30.00	<b><u>PRIVATE HEALTH CARE</u></b> The function of regulating and monitoring health facilities, including hospitals, provided by the private sector.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
30.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA
30.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDAA
30.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO after last action	5 years  5 years	2 years	
30.04	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDAA
30.05	<b>CONTRACTING OUT</b> records associated with the activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services.		See General Disposal Authority for Administrative Records			GDAA
30.06	<b>ENQUIRIES</b> records associated with the activities associated with the handling of requests for information about the organisation and its services by the general public or a constituted entity.	D	Destroy 5 years after last entry	2 years	3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
30.07	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 7 years after last action	2 years	5 years	
30.08	<b>HEALTH ETHICS</b> records associated with the activities related to matters of professional practice, professional and community values about the balance between public interest and the interests of individuals in health policy, practice and research.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
30.09	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
30.10	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5years after last action	2 years	3 years	
30.11	<b>LICENSING</b> records associated with the activity of providing and managing the licensing procedures as defined in legislation as applicable as the responsibility of the authority.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
30.12	<b>LITIGATION</b> records associated with the activities involved in managing lawsuits or legal proceedings between the agency and other parties. <b>Legal action</b> – of major public interest/controversy, setting a precedent, or resulting in a major change to organizational policy or procedures  Legal action other than above	A	Transfer to the State Records Office 5 years after case completed	3 years	7 years	
		D	Destroy 10 years after action completed or expiry of the statute of limitations, whichever is the later			
30.13	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
30.14	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
30.15	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
30.16	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
30.17	<b>QUALITY ASSURANCE</b> records associated with the activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers.	D	Destroy 7 years after last action	2 years	5 years	
30.18	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
30.19	<b>REVIEWING</b> records associated with the activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems.	D	Destroy 7 years after last action	2 years	5 years	
30.20	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
30.21	<b>STANDARDS</b> records associated with implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the Authority.	D	Destroy 7 years after last action	2 years	5 years	
30.22	<b>TRANSPLANT SERVICES</b> records associated with the activity of performing the procedure of arranging for the acquisition, transportation and ready availability of access to any tissue or organ taken from a donor site and transplanted to a recipient site.	R	Retain Permanently within agency			
31.00	<b><u>PROJECT MANAGEMENT</u></b> The function of managing defined organisational projects in a rigorous manner. Includes planning, scoping and reporting work so as to produce specifically defined outputs by a certain time, to a defined quality and with a given level of resources so that planned outcomes are achieved.					
31.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
31.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDA
31.03	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
31.04	<b>BUDGETING</b>  The process of planning the use of expected income and expenditure over a specified period.		See General Disposal Authority for Financial and Accounting Records			GDAFA
31.05	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		See General Disposal Authority for Administrative Records			GDA
31.06	<b>COMPLIANCE</b>  The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as ISO 9000 series.		See General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
31.07	<b>CONSULTING SERVICES</b> records associated with the provision of professional advice to units, entities, NGO's or groups of patients / clients. Individual consultations should be maintained on the individual patient medical record file.	D	Destroy 7 years after last action	2 years	5 years	
31.08	<b>CORPORATE GOVERNANCE</b> The manner in which a corporation is directed, and laws and customs affecting that direction. Includes the laws governing the formation of firms, the bylaws established by the firm itself, and the structure of the firm. Issues of fiduciary duty and accountability are often discussed within the framework of corporate governance.	D	Destroy 7 years after last action	2	5	
31.09	<b>EVALUATION</b> Records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 10 years after last action	3 years	7 years	
31.10	<b>FUNCTIONS (social)</b>  The process of organising and managing an official or formal social occasion conducted by the organisation to enhance its internal and external relationships, or to promote its services and image.	D	Destroy 5 years after last action	2 years	3 years	
31.11	<b>IMPLEMENTATION</b>  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 the installation of equipment. Also includes monitoring to ensure that the implementation goes according to schedule and that standards are met.	D	Destroy 7 years after last action	2 years	5 years	
31.12	<b>INSURANCE</b>  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 organisation's premises or whilst engaged during employment.		See General Disposal Authority for Financial and Accounting Records			GDAFA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
31.13	<b>LIAISON</b> records associated with the activities associated with maintaining regular general contact between the organisation and like authorities, professional associations, professionals in related fields, other private sector organisations, official stakeholders and community groups.	D	Destroy 5years after last action	2 years	3 years	
31.14	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDAA
31.15	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
31.16	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
31.17	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer General Disposal Authority for Administrative Records			GDAA
31.18	<b>PROCEDURES</b> records associated with the standard methods of operating laid down by an organisation according to formulated policy.		Refer General Disposal Authority for Administrative Records			GDAA
31.19	<b>REPORTING</b> records 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.	D	Destroy 5years after last action	2 years	3 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
31.20	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
31.21	<b>REVIEWING</b> records associated with the activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems.	D	Destroy 7 years after last action	2 years	5 years	
31.22	<b>RISK MANAGEMENT</b>  The activity involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	
31.23	<b>STAKEHOLDER RELATIONS</b>  The activities associated with establishing and maintaining a working relationship between clinicians, peak health and aged care organisations, peak health and aged industry bodies and other stakeholders, and the agency. Includes negotiations, meetings, forums, and public consultations.		Destroy 7 years after last action	2 years	5 years	
31.24	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		Refer General Disposal Authority for Administrative Records			GDAA
31.25	<b>VISITS</b>  The activities involved in arranging visits by other organisations, the public and students to the organisation, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by staff to other organisations.	D	Destroy 7 years after last action	2 years	5 years	
32.00	<b><u>PROPERTY MANAGEMENT</u></b>  The function of managing land and working, storage, or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of premises. Includes buildings and land allotments either owned, rented, or leased by the organisation, such as office blocks, repositories and workshops. Also includes the removal of pollutants and waste.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
32.01	<b>ACQUISITION</b>  The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions. Add the type of acquisition as free text.		Refer to General Disposal Authority Finance and Accounting Records			GDAFA
32.02	<b>ARRANGEMENTS</b>  The activities involved in arranging for a journey or trip. Includes preparing travel itineraries, authorisations, entitlements etc. Also includes arrangements made for the delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space.		Refer to General Disposal Authority for Administrative Records			GDAA
32.03	<b>ASSET REGISTER</b>  The activities involved in recording in a subsidiary ledger all fixed assets owned by the organisation. Includes the date of purchase, depreciation expense, written down value as well as stocktaking and auditing notations.		Refer GDAFA			GDAFA
32.04	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.  Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
32.05	<b>CASES</b>  This activity descriptor should be used where there's a need to keep a number of activities on one file, for legislative or operational reasons. Case files relate to particular incidents, persons, organisations or clients.	D	Destroy 7 years after last action	2 years	5 years	
32.06	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment. appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		Refer General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
32.07	<b>CONSERVATION</b>  The activities involved in the preservation, protection, maintenance, restoration and enhancement of properties, including buildings and land, and information resources and artifacts.		Refer General Disposal Authority for Administrative Records			GDA
32.08	<b>CONSTRUCTION</b>  The process of making or building something.		Refer General Disposal Authority for Administrative Records			GDA
32.09	<b>CONTRACTING OUT</b>  The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.		Refer General Disposal Authority for Administrative Records			GDA
32.10	<b>DISASTER RECOVERY MANAGEMENT</b>  Disaster recovery management consists of creating a strategy and planning to protect all of an organisation's assets including people, records, information and data, vital records, and facilities in case a disaster occurs. Some disasters, such as those resulting from faulty wiring or leaky plumbing, can be avoided; others, such as fires, floods and extreme weather conditions, cannot. Disasters can be as minor as a temporary loss of electrical power or as major as a devastating fire, flood or a terrorists bombing of the premises or something between these extremes. Whatever the case, preparing for a disaster before it happens can minimise some of the debilitating effects a disaster can have.	D	Destroy 7 years after last action	2 years	5 years	
32.11	<b>DISPOSAL</b>  The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into low-cost or archival storage. Add what is being disposed of as free text.		Refer General Disposal Authority for Administrative Records			GDA
32.12	<b>FIT OUTS</b>  The process of refurbishment a workplace internally. Includes painting, floor coverings, furnishings, furniture, fittings and equipment.		Refer General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
32.13	<b>INSPECTIONS</b>  The process of official examinations of facilities, equipment and items, to ensure compliance with agreed standards and objectives. Add the name of the body undertaking the inspection.		Refer General Disposal Authority for Administrative Records			GDA
32.14	<b>INSTALLATION</b>  Activities involved in placing equipment in position and connecting and adjusting it for use.		Refer General Disposal Authority for Administrative Records			GDA
32.15	<b>INSURANCE</b>  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 organisation's premises or whilst engaged during employment.		See General Disposal Authority for Financial and Accounting Records			GDAFA
32.16	<b>LEASING</b>  The activities involved in leasing items, equipment, accommodation, premises or real estate from another organisation.		Refer General Disposal Authority for Administrative Records			GDA
32.17	<b>LEASING OUT</b>  The activities involved in leasing out items, equipment, accommodation, premises or real estate to another organisation or person for a specified period and agreed price. Includes the formal documentation setting out conditions, rights, responsibilities etc of both parties. Also includes subleasing.	D	Destroy 7 years after expiry of agreement	2 years	5 years	
32.18	<b>MAINTENANCE</b>  The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.		Refer General Disposal Authority for Administrative Records			GDA
32.19	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
32.20	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.		Refer General Disposal Authority for Administrative Records			GDA
32.21	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer General Disposal Authority for Administrative Records			GDA
32.22	<b>RISK MANAGEMENT</b>  The activity involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.		Refer General Disposal Authority for Administrative Records			GDA
32.23	<b>SECURITY</b>  The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.		Refer General Disposal Authority for Administrative Records			GDA
32.24	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		Refer General Disposal Authority for Administrative Records			GDA
33.00	<b><u>PUBLIC HEALTH</u></b>  The function of securing the health of the whole population, rather than individuals, using a variety of strategies and approaches that tend to be more preventative in nature and that act to prevent disease and harm, and to promote, protect and advance quality health outcomes. A focus on the underlying causes of ill health. A commitment on preventative strategies, with a solid foundation in legislation / regulation as well as intervention programs. A strong scientific, analytical and statistical basis; in particular the routine application of epidemiology.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
33.01	<b>ADVICE</b> records associated with the activities associated with offering opinions by or to the organisation as to an action or judgement.		See General Disposal Authority for Administrative Records			GDA
33.02	<b>AGREEMENTS</b> records associated with the processes associated with the establishment, maintenance, review and negotiation of agreements.		See General Disposal Authority for Administrative Records			GDA
33.03	<b>ALCOHOL AND SUBSTANCE MISUSE SERVICES</b> records associated with the activities related to the minimisation of the social and health impact of alcohol and other drugs or substance use.	A	Transfer to State Records Office 5 years after reference ceases	5 years		
33.04	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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. Where not resulting in changes to policy or procedures  Should the audit lead to changes in policies or procedures or set a precedent, transfer to SRO.	D  A	Destroy 7 years after last action  Transfer to SRO 5 years after last action	2 years  5 years	5 years	
33.05	<b>COMMITTEES</b> records associated with the activities associated with the management of committees (internal and external, private, local, state, Commonwealth etc.).		See General Disposal Authority for Administrative Records			GDA
33.06	<b>DISEASE PREVENTION AND CONTROL</b> records associated with the activity of monitoring the rate of diseases and infections and measures to reduce the impact of diseases within the community and within specific target groups to improve health outcomes.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
33.07	<b>DONATIONS (Organs &amp; Tissue)</b> records associated with the activities related to the removal of specific tissues of the human body from a person who has recently died, or from a living donor, for the purpose of transplanting them into other persons.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.08	<b>EVALUATION</b> records associated with the process of determining the suitability of potential or existing programs, business cases, items of equipment, systems or services in relation to meeting the needs of the given situation.	D	Destroy 7 years after last action	2 years	5 years	
33.09	<b>FUNERAL INDUSTRY MANAGEMENT</b> records associated with the activities associated with the regulation of burials or cremation of the dead to ensure standards of public health are observed.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.09.01	<b>FUNERAL INDUSTRY MANAGEMENT - Cremation Permits and Approval Forms</b>	D	Destroy 7 years after last action	1 year	6 years	
33.10	<b>HEALTH PROMOTION</b> records associated with the activity of promoting healthy lifestyles and awareness and low risk behaviours in the community through strategies such as education, creating healthy and safe environments and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.11	<b>HEALTH PROTECTION</b> records associated with the activity of protecting people's health and reducing the impact of infectious diseases, chemical hazards, poisons and radiation hazards.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.12	<b>INJURY PREVENTION</b> records associated with the activity of creating programs to prevent injury through a range of strategies including education, creating healthy and safer environments, and public health policies.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.13	<b>LEGISLATION</b> records associated with the process of making laws.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
33.14	<b>MEETINGS</b> records associated with the activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole.		See General Disposal Authority for Administrative Records			GDA
33.15	<b>MONITORING</b> records relating to the activities that check, observe, or record the operation of equipment, infrastructure, services or systems.	D	Destroy 7 years after last action	2 years	5 years	
33.16	<b>PLANNING</b> records associated with the activities related to the process of formulating ways in which objectives can be achieved.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.17	<b>POLICY</b> records associated with the activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		See General Disposal Authority for Administrative Records			GDA
33.18	<b>RADIATION HEALTH</b> records associated with the activity of protecting people from any adverse health effects of either ionising or non-ionising radiation.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.19	<b>REPORTING</b> records 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.	D	Destroy 5 years after last action	2 years	3 years	
33.20	<b>RESEARCH</b> records associated with the activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
33.21	<b>RURAL AND REMOTE HEALTH</b> records associated with the activity of providing access to health services to people geographically disadvantaged.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
33.22	<b>SUBMISSIONS</b> records associated with the preparation and submission of a formal statement (e.g. report, statistics, etc.) supporting a case or opinion held by the organisation which is submitted to another organisation, or within the organisation, for the purpose of either gain or support.	D	Destroy 7 years after last action	2 years	5 years	
33.23	<b>TRAINING / EDUCATION</b> records associated with the activities associated with all aspects of training / education (external/internal) available to staff and members.	D	Destroy 7 years after last action	2 years	5 years	
33.24	<b>WATER SUPPLIES</b> records associated with the process of managing the source, means, or process of supplying water (as for a community) usually including reservoirs, tunnels, and pipelines and often the watershed, or underground supply from which the water is ultimately drawn.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
34.00	<b><u>PUBLICATION</u></b>  The function of having works, irrespective of format, issued for sale or distribution internally or to the public. Includes drafting, manual or electronic production (design, layout, compilation, printing etc), marketing and supply of publications by the organisation (such as technical papers, issues papers, articles for professional journals and reports) and leaflets which aim to promote the services and public image of the organisation; and internal publications (such as newsletters, circulars, procedure manuals etc), which are not produced for public relations reasons. Also includes multi media publications, CD-ROM and on-line information services.					
34.01	<b>CORPORATE STYLE</b>  The activity of compiling and administering guidelines on the consistency in written style, graphic design etc within the organisation's documents. Includes designing logos, letterhead, stationery, publications etc that incorporate the corporate image of the organisation.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
34.02	<b>DISTRIBUTION</b>  The activities associated with disseminating items, correspondence, or publications through sales, deliveries, or other customer services.		Refer General Disposal Authority for Administrative records			GDAA
34.03	<b>INTELLECTUAL PROPERTY (IP)</b>  The activities involved in managing the agency's intellectual property, both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public under Freedom of Information (FOI) legislation.	D	Destroy 7 years after copy right expires	2 years	5 years	
34.04	<b>MARKETING</b>  The process of analysing, creating and selling products and services. Includes market research, sales forecasting, advertising, media releases, promotion, pricing and product evaluation.	D	Destroy 7 years after last action	2 years	5 years	
34.05	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer General Disposal Authority for Administrative records			GDAA
34.06	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
34.07	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined. Add as a descriptor under either a functional or an administrative keyword to document the formulation, research, drafting, reviewing, amending, adoption and implementation of organisational policy.		Refer General Disposal Authority for Administrative records			GDAA
34.08	<b>PRODUCTION</b>  The process involved in producing material into an end result or output eg a product or publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.		Refer General Disposal Authority for Administrative records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
34.09	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		Refer General Disposal Authority for Administrative records			GDA
35.00	<b><u>STAFF DEVELOPMENT</u></b>  The function of encouraging staff to develop their skills and abilities (through activities, programs and events) to maximise their potential and increase their productivity. Includes identifying and implementing all aspects of training and education needs and programs (internal and external) available to staff.					
35.01	<b>ADDRESSES (presentations)</b>  The activity of giving addresses for training and education, professional, community relations or sales purposes. Includes speeches and multi-media presentations. Add the title of the address as free text.	D	Destroy 5 years after last action	2 years	3 years	
35.02	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment. appointment of members, terms of reference, proceedings, minutes, reports, Agendas etc.		Refer to General Disposal Authority for Administrative Records			GDA
35.03	<b>CONFERENCES</b>  The activities involved in arranging or attending conferences held either by the organisation or by other organisations. Includes registrations, publicity, and reports of participants etc. Place published reports and proceedings in the organisation's library or information centre. Link the file and reports and proceedings intellectually.		Refer to General Disposal Authority for Human Resource Management Records			GDAHRM
35.04	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer to General Disposal Authority for Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
35.05	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		
35.06	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer to General Disposal Authority for Administrative Records			GDAA
35.07	<b>TRAINING AND EDUCATION</b>  The activity of encouraging staff and patients/clients to develop their skills and abilities (through activities, programs & events) to maximise their potential and increase productivity. Includes identifying and implementing all aspects of training and education needs and programs (internal and external) available to staff, clients and patients.		Refer General Disposal Authority Human Resources Management Records			GDAHRM
36.00	<b><u>STRATEGIC MANAGEMENT</u></b>  The function of applying broad systematic management planning for the organisation. Includes the activities involved with the development, monitoring and reviewing of business plans, strategic plans, corporate plans, Equal Employment Opportunity (EEO) plans, Ethnic Affairs Policy Statements (EAPS) and other agreements, energy and waste management plans, and other long term organisational strategies. Also includes the development of the corporate mission, objectives, continuous improvement processes, quality assurance and certification, and the formulation and amendment of legislation which provides the legislative basis for the organisation.					
36.01	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment. appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		Refer to General Disposal Authority for Administrative Records			GDAA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
36.02	<b>IMPLEMENTATION</b>  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 the installation of equipment. Also includes monitoring to ensure that the implementation goes according to schedule and that standards are met.	D	Destroy 7 years after last action	2 years	5 years	
36.03	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer to General Disposal Authority for Administrative Records			GDAA
36.04	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.		Refer to General Disposal Authority for Administrative Records			GDAA
36.05	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer to General Disposal Authority for Administrative Records			GDAA
36.06	<b>RESTRUCTURING</b>  The activities involved in the reassessment of the activities, goals and structure of an organisation. Includes consideration of the number of staff, their position, descriptions, equipment, and other resources required to meet objectives.	A	Transfer to State Records Office 5years after last action	5 years		
37.00	<b><u>TECHNOLOGY AND TELECOMMUNICATIONS</u></b>  The function of developing or acquiring, testing and implementing applications and databases to support the business needs of the organisation, to capture, store, retrieve, transfer, communicate and disseminate information through automated systems. Includes the evaluation of software and hardware and the acquisition, tendering, leading, licensing and disposal of systems. Also includes communication network systems such as video conferencing, voice mail and electronic mail and the technical aspects of the Internet, Intranet and Web Sites.					

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
37.01	<b>ACQUISITION</b>  The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions. Add the type of acquisition as free text. .		Refer General Disposal Authority Administrative Records			GDA
37.02	<b>APPLICATION DEVELOPMENT (Software)</b>  The activities associated with developing software and programming codes to run business applications. Includes specifications, testing pilots, prototyping and metadata requirements.		Refer General Disposal Authority Administrative Records			GDA
37.03	<b>ASSET REGISTER</b>  The activities involved in recording in a subsidiary ledger all fixed assets owned by the organisation. Includes the date of purchase, depreciation expense, written down value as well as stocktaking and auditing notations.		Refer to General Disposal Authority for Finance and Accounting records			GDAFA
37.04	<b>AUDIT EXTERNAL or AUDIT INTERNAL</b> records relating to 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.		Refer General Disposal Authority Administrative Records			GDA
37.05	<b>COMMITTEES</b>  The activities associated with the management of committees and task forces (internal and external, private, local, state, Commonwealth etc). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agendas etc.		Refer to General Disposal Authority for Administrative records			
37.06	<b>CONTRACTING OUT</b>  The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.		Refer General Disposal Authority Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
37.07	<b>DATABASE MANAGEMENT</b>  The activities associated with the building, prototyping and testing of databases. Includes the management of user rules, passwords, regular programs of backups and journals and monitoring usage and response times.		Refer General Disposal Authority Administrative Records			GDA
37.08	<b>DISASTER RECOVERY MANAGEMENT</b>  Disaster recovery management consists of creating a strategy and planning to protect all of an organisation's assets including people, records, information and data, vital records, and facilities in case a disaster occurs. Some disasters, such as those resulting from faulty wiring or leaky plumbing, can be avoided; others, such as fires, floods and extreme weather conditions, cannot. Disasters can be as minor as a temporary loss of electrical power or as major as a devastating fire, flood or a terrorists bombing of the premises or something between these extremes. Whatever the case, preparing for a disaster before it happens can minimise some of the debilitating effects a disaster can have.	D	Destroy 7 years after system discontinued or superseded	2 year	5 years	
37.09	<b>DISPOSAL</b>  The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into low-cost or archival storage. Add what is being disposed of as free text.		Refer General Disposal Authority Administrative Records			GDA
37.10	<b>EVALUATION</b>  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 ongoing monitoring.		Refer General Disposal Authority Administrative Records			GDA
37.11	<b>IMPLEMENTATION</b>  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 the installation of equipment. Also includes monitoring to ensure that the implementation goes according to schedule and that standards are met.		Refer General Disposal Authority Administrative Records			GDA

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
37.12	<b>INSTALLATION</b>  Activities involved in placing equipment in position and connecting and adjusting it for use.		Refer General Disposal Authority Administrative Records			GDA
37.13	<b>INTELLECTUAL PROPERTY (IP)</b>  The activities involved in managing the agency's intellectual property, both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public under Freedom of Information (FOI) legislation.	D	Destroy 7 years after copyright expires	2 years	5 years	
37.14	<b>LEASING</b>  The activities involved in leasing items, equipment, accommodation, premises or real estate from another organisation.		See General Disposal Authority for Financial and Accounting Records			GDAFA
37.15	<b>MAINTENANCE</b>  The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.		Refer General Disposal Authority Administrative Records			GDA
37.16	<b>MEETINGS</b>  The activities associated with gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.		Refer General Disposal Authority Administrative Records			GDA
37.17	<b>OPERATIONS</b>  The activities associated with keeping computer systems in effective operation on a daily basis. Includes fault reporting, help and desktop support.		Refer General Disposal Authority Administrative Records			GDA
37.18	<b>PLANNING</b>  The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	A	Transfer to the State Records Office 5 years after reference ceases	5 years		

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
37.19	<b>POLICY</b>  The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.		Refer General Disposal Authority Administrative Records			GDA
37.20	<b>PRIVACY</b>  The activities associated with applying the principles of privacy. Includes data protection in relation in privacy. Also includes the process of collection, handling, use and disclosure of records of a private, personal, or confidential nature to maintain that the rights of a living person (or immediate family) are secure from unauthorised disclosure or access to such information.	D	Destroy 15 years after last action	5 years	10 years	
37.21	<b>QUALITY ASSURANCE</b>  The activities associated with developing, evaluating, and implementing workflows, and systems directed at achieving and maintaining quality for health providers. Includes data modeling and monitoring. For determining the suitability of potential or existing programs, systems and services in relation to meeting the needs of the given situation, use EVALUATION.	D	Destroy 7 years after last action	2 years	5 years	
37.22	<b>RISK MANAGEMENT</b>  The activity involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	D	Destroy 7 years after last action	2 years	5 years	
37.23	<b>SECURITY</b>  The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.		Refer General Disposal Authority Administrative Records			GDA
37.24	<b>STANDARDS</b>  The process of implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the organisation.	D	Destroy 7 years after last action	2 years	5 years	

REF NO.	DESCRIPTION OF RECORDS	Disposal Action A = Archive D = Destroy R = Retain		Retention by Department of Health		Disposal Authority
				On site	Off site	
37.25	<b>TENDERING</b>  The activities involved in receiving and assessing tenders. Includes offers made in writing by one party to another to carry out work at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.		Refer to General Disposal Authority for Finance and Accounting records			GDAFA

# Retention and Disposal Schedule for Administrative and Functional Records

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