

Documentation

Records I need to keep

A record is any form of information, both created or received, that provides evidence of the decisions and actions of the department.

CAPTURE DECISION	A	CAPTURE TAKEN	ACTION	CREATED, RECEIVED OR KEPT TO MEET	FOUND WITHIN
• Policies, procedures • File notes • Agenda, minutes, related papers • Leave applications • Discussion papers • Plans • Authorisations • Permission forms • Enrolment forms • Business cases • Finance approval • Recruitment and selection documentation • Professional development plans		• Internal/external active • Drafts submitted for formal consultation or approval • Drafts that show a change in direction by management • Drafts showing substantial feedback or comments • Recommendations • Invoices for payment • Legal agreements • Research reports and data instructions		• Legal/disciplinary requirement or action, licences, permits, contracts, advice, complaints, request for information • Community expectations, visitor sign-in books, reports, consultation • Business support decisions and actions, service contract, general ledger, advice, expenditure approvals	• Emails • Text messages • Spreadsheets • Shared devices • Collaboration sites • Websites online

Things that do not need to be kept include calendars, telephone lists, action lists, printed timetables, press cutting, research articles, external training materials, duplicates, emails for information only, some drafts, working notes, lists of contacts or suppliers, credit card numbers, personal emails or phone messages.

All information must be handled and protected according to its information security classification especially regarding personal information.