

Territory Records (Records Disposal Schedule – Student Management Records) Approval 2016 (No 1)

Notifiable instrument NI2016—568

made under the

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

1 Name of instrument

This instrument is the Territory Records (Records Disposal Schedule – Student Management Records) Approval 2016 (No 1)

2 Commencement

This instrument commences on the day after notification.

3 Approval

I approve the Records Disposal Schedule – Student Management Records.

4 Revocation

I revoke Territory Records (Records Disposal Schedule - Student Management Records) Approval 2015 (No 1) NI2015-360.

Danielle Wickman
Director of Territory Records
10 October 2016



Records Disposal Schedule

Student Management Records

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INTRODUCTION

The *Records Disposal Schedule - Student Management Records* is the official authority for the disposal of these ACT Government records.

It is one of a series of Whole of Government Records Disposal Schedules authorised by the Director of Territory Records in accordance with the provisions of the *Territory Records Act 2002*. It is used in conjunction with other Territory Records Disposal Schedules.

PURPOSE

The purpose of this Records Disposal Schedule is to provide for the authorised disposal of Student Management records created or maintained by ACT Government Agencies.

SCOPE

This Records Disposal Schedule applies to records created or maintained by ACT Government Agencies. It applies to records in any format, including electronic records.

AUTHORITY

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

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

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

STRUCTURE AND RELATIONSHIP TO THE WHOLE OF GOVERNMENT THESAURUS

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

Retention periods set down in this schedule are minimum periods only and an agency may keep records for a longer period if considered necessary for business requirements. Reasons for longer retention could include legal requirements, administrative need or agency directives. **An agency must take all reasonable steps to ensure that no legal action is contemplated in relation to its records and must not dispose of any records where it is aware of possible legal action for which the records may be required as evidence or if there is a current records disposal freeze in effect.**

The *Records Disposal Schedule - Student Management Records* has a hierarchical structure that reflects its arrangements according to functions and activities, rather than by subject, and this also reflects a close relationship to the Whole of Government Thesaurus. The Records Disposal Schedule is designed to be applicable to all records relating to the function described in this schedule regardless of titling conventions used, so that records, which have not been classified and titled using the terminology represented by this Records Disposal Schedule, may still be sentenced with relative ease.

Whole of Government Thesaurus

The Whole of Government Thesaurus is a controlled vocabulary of terms designed for use in the classifying, titling and indexing of records on creation.

The Whole of Government Thesaurus has been developed on the basis of the former Territory Version of Keyword AAA (TVKAAA) (2010). In the Whole of Government Thesaurus all functions are considered to be functions performed by the ACT Government and have been included following consultation with stakeholder agencies and after consideration by the Territory Records Office (TRO) via a formal approval process.

The Whole of Government Thesaurus is mandated by the Director of Territory Records for use by all ACT Government agencies as part of classifying and titling of their paper and electronic records. See also *Records Advice No.28 Functional directories on shared drives*.

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

GUIDELINES FOR USE

Coverage of authority

The *Records Disposal Schedule - Student Management Records*:

- covers all records related to the function;
- is intended to be used in conjunction with other Territory Whole of Government Records Disposal Schedules;
- specifies the minimum period records should be kept (retention periods)
- specifies whether, upon the expiry of the retention periods, the records may be destroyed or are required as Territory Archives; and
- is applicable to records created and maintained in any format, including electronic or formats such as microfiche.

Layout of the schedule

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

Function.

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

Activity.

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

Entry No.

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

Description of Records.

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

Disposal Action.

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

FORMAT OF RECORD

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

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

Electronic records

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

Electronic records must be readily accessible for the length of the specified retention period. Routine treatment (such as wiping, updating, alterations or re-recording) does not constitute disposal.

DESTRUCTION OF RECORDS

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

UPDATING THE RECORDS DISPOSAL SCHEDULE

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

ASSISTANCE IN USING THE RECORDS DISPOSAL SCHEDULE

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

RELATED LEGISLATION

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

ACT Civil and Administrative Tribunal Act 2008
Administrative Decisions (Judicial Review) Act 1989
Associations Incorporation Act 1991
Board of Senior Secondary Studies Act 1997
Canberra Institute of Technology Act 1987
Discrimination Act 1991
Drugs of Dependence Act 1989
Education Act 2004
Education Services for Overseas Students Act 2000 (Cwlth)
Epidemiological Studies (Confidentiality) Act 1992
Evidence (Miscellaneous Provisions) Act 1991
Evidence Act 2011
Food Act 2001
Freedom of Information Act 1989
Health Professionals Act 2004
Health Records (Privacy and Access) Act 1997
Higher Education Funding Act 1988 (Cwlth)
Information Privacy Act 2014
Limitation Act 1985
Medical Treatment (Health Directions) Act 2006
Mental Health (Treatment and Care) Act 1994
Mental Health (Treatment and Care) (Interstate Application of Mental Health Laws) Agreement 2002 (No 1)
Mental Health (Treatment and Care) (Interstate Application of Mental Health Laws) Agreement 2002 (No 2)
Mental Health (Treatment and Care) (Interstate Application of Mental Health Laws) Agreement 2003
Mental Health (Treatment and Care) (Interstate Application of Mental Health Laws) Agreement 2004
Mental Health (Treatment and Care) Interstate Application of Mental Health Laws Agreement 2011
National Vocational Education and Training Regulator Act 2011 (Cwlth)
Ombudsman Act 1989
Medicines, Poisons and Therapeutic Goods Act 2008
Privacy Act 1988 (Cwlth)
Public Health Risk (Centre for Opioid Detoxification using Opioid Antagonists) Declaration 2001
Residential Tenancies Act 1997
Schools Assistance (Learning Together - Achievement Through Choice and Opportunity) Act 2004 (Cwlth)
Standards for NVR Registered Training Organisations 2012 (Cwlth)
Territory Records Act 2002
Training and Tertiary Education Act 2003
University of Canberra Act 1989
Work Health and Safety Act 1989

DEFINITIONS

Agency

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

Appraisal

The process of evaluating business activities to:

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

Business Classification Scheme

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

Principal Officer

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

Records

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

Records of an Agency

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

Records Disposal Schedule

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

Records Management Program

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

Recordkeeping Systems

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

Scope Note

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

Sentencing

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

Territory Archives

Records preserved for the benefit of present and future generations.

BUSINESS CLASSIFICATION SCHEME

STUDENT MANAGEMENT

The function of managing students by supporting them throughout their attendance at schools and tertiary educational institutions and assisting them to undertake and successfully complete their studies. Includes matters affecting the safety, health and general welfare of students such as domestic violence (child abuse), drug abuse, and support services and programs such as immunisations, counselling, medical assessment and distance education arrangements provided by the agency to meet the needs of students. Also includes admissions, enrolment, exchange programs, misconduct processes, graduation, prizes and scholarships, and the provision of residential facilities or placements.

Accidents

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 the general public or visitors whilst on the organisation's premises. Also includes measures to prevent accidents occurring.

Addresses (presentations)

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

Advice

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

Agreements

The processes associated with the establishment, maintenance, review and negotiation of agreements. Includes records associated with preparing agreements/contracts and settling those agreements/contracts. Includes contracts, memoranda of understanding (MOU), deeds, leases, licences and mortgages.

Appeals (decisions)

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

Arrangements

The activities involved in arranging for a journey or trip or for the delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space. Includes preparing travel itineraries, authorisations, entitlements, etc.

Audit

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

Authorisation

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

Case Management

The activity of managing an incident, person, organisation or client on a case basis. Case management incorporates the process of assessment, planning, facilitation and advocacy for options and services to meet an individual's, organisation's or client's needs or outcomes. Includes processing applications; authorisations and approvals; the establishment of a client; developing, implementing and monitoring case plans; the ongoing delivery and provision of services; finalisation of services and reviews of service delivery.

Celebrations

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

Ceremonies

The activities associated with arranging and managing a formal act performed for a special occasion.

Committees

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

Compliance

The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements. Includes compliance with legislation and with national and international standards, such as the ISO 9000 series.

Conferences

The activities involved in arranging or attending conferences held either by the agency or by other agencies or organisations. Includes registrations, publicity, and reports of participants, etc.

Counselling

The activities associated with giving advice or guidance to an employee or client for various reasons.

Note: If the counselling is provided as part of a service for managing an individual's compensation case use PERSONNEL - Case Management.

Discipline

The activities and actions associated with the disciplinary process. Includes investigation, charges, formal inquiries, and punishment.

Enquiries

The activities associated with handling requests for information about the agency and its services, programs and activities.

Evaluation

The process of determining the suitability of potential or existing programs, items of equipment, systems or services in relation to meeting the needs of the given situation. Includes systems analysis and ongoing monitoring.

Events

The activities relating to the arranging and staging of events. Includes support for local suppliers and organisations to attend, display or promote (e.g. trade displays, Christmas pageants, Canberra Show). Also includes events arranged and staged by agencies (e.g. open days, land sales, Floriade).

Grant Funding

The activities associated with the application for and receipt of grants.

Grievances

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, equipment, promotion, or higher duties.

Health Promotion

The process of promotion of programs which encourage the establishment and maintenance of a healthy environment and which encourage healthy lifestyles. Includes workplace environments.

Implementation

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

Liaison

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

Meetings

The activities associated with regular or ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the function. Includes staff meetings, arrangements, agenda, taking of minutes, etc. Excludes committee meetings.

Payments

The activities involved in the preparation and payment of money.

Planning

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

Policy

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making.

Procedures

Standard methods of operating laid down by the agency according to formulated policy.

Public Reaction

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

Registration

The activities to record, catalogue, inventory or list. The establishment and maintenance of registers containing information required by legislation.

Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies, regulation, or legislation, e.g. Annual Report). Includes statistics and returns.

Note: Reports resulting from a routine activity, e.g. inspection reports, form part of that activity, i.e. reports resulting from an inspection are part of the inspection and not the activity of Reporting. Reports of these types should be classified as part of the greater activity generating the report.

Representatives

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

Research

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

Reviewing

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

Service Provision

The activities relating to services provided by an agency on a long term basis or by other agencies. Includes requests and applications for services, assessment of eligibility and entitlements, liaison with other agencies regarding the provision of services. Also includes activities to lobby for services and to increase service provision. Also includes the installation, operation and removal of temporary facilities in parks and reserves, such as water, electricity, temporary toilets, etc. for special outdoor events.

Submissions

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

Suggestions

The process of using suggestions from personnel and the public to improve the services and processes of the agency.

Training

The activities associated with all aspects of the provision of training and development (external/internal).

Visits

The activities involved in arranging visits by other agencies, the public and students to the agency, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by staff to other agencies, organisations, etc. Also includes arranging student camps and excursions to other destinations.

RECORDS DISPOSAL SCHEDULE

Advice

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.005.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting the development and provision of advice or the receipt of advice relating to the management of students that resulted in major changes to the agency's policies, procedures or caused considerable controversy. Includes advice provided by consultants and working papers.	Retain as Territory Archives
024.005.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting the development and provision of advice or the receipt of advice relating to the management of students that did not result in major changes to the agency's policies, procedures or caused considerable controversy. Includes advice provided by consultants and working papers.	Destroy 5 years after last action

Agreements

The processes associated with the establishment, maintenance, review and negotiation of agreements. Includes records associated with preparing agreements/contracts and settling those agreements/contracts. Includes contracts, memoranda of understanding (MOU), deeds, leases, licences and mortgages.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.006.001 ■■■■■■■■■■■■■■■■■■■■	Agreements and supporting documents. Includes contracts and project scope documents.	Destroy 7 years after agreement expires or is terminated

Appeals (decisions)

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.009.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting appeals made against decisions affecting students, (e.g. applications for admissions, disputed entry, including Summer School, examination/assessment results and special consideration requests).	Destroy 10 years after last action

Arrangements

The activities involved in arranging for a journey or trip including preparing travel itineraries, authorisations, entitlements etc., and arrangements made for the delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space. Also includes arrangements for conducting ceremonies, conferences, events, examinations, assessments, visits or tours, etc.

Entry No.	Description of Records	Disposal Action
024.011.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting arrangements for visits made to ACT Government educational institutions by important community representatives. Includes Public visitor books. <i>[For visitor books signed by Royalty or Heads of State, use GOVERNMENT & STAKEHOLDER RELATIONS - Events.]</i>	Destroy 5 years after last action
024.011.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting arrangements for ceremonies of a routine nature, (e.g. graduation ceremonies) or ceremonies of lesser significance, including acceptance by students of the offer to graduate e.g. Graduation Ticket Responses.	Destroy 3 years after last action
024.011.003 ■■■■■■■■■■■■■■■■■■■■	Records documenting arrangements for visits or tours to ACT Government educational institutions by the general public.	Destroy 2 years after last action
024.011.004 ■■■■■■■■■■■■■■■■■■■■	Records documenting administrative arrangements for examinations and assessments, including arrangements for invigilators; timetables; and eligibility lists, travel and accommodation and guest speakers at conferences organised by the agency. <i>[For the appointment of examiners, assessors or supervisors, use HUMAN RESOURCES - Recruitment.]</i>	Destroy 2 years after last action

Authorisation

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.014.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting delegations of power to agency staff to authorise administrative action.	Destroy 7 years after delegation expires
024.014.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting authorisations for administrative action.	Destroy 7 years after last action

Case Management

The activity of managing an incident, person, organisation or client, on a case basis. Case management incorporates the process of assessment, planning, facilitation and advocacy for options and services to meet an individual’s, organisation’s or client’s needs or outcomes. Includes processing of applications; authorisations and approvals; the establishment of a client; developing, implementing and monitoring case plans; the ongoing delivery and provision of services; finalisation of services and reviews of service delivery.

[For appeals of decisions, use STUDENT MANAGEMENT – Appeals (decisions).

For examination and test results of apprentices and trainees, use STUDENT MANAGEMENT – Training.

For student work placements, use STUDENT MANAGEMENT – Training

For applications for Recognition of Prior Studies/Learning by apprentices and trainees, use STUDENT MANAGEMENT – Training.]

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.016.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting individual students and home schooling/tuition students examination results, including academic transcripts/final results, examination assessment returns or results sheets and amendments to examination returns. Also includes copies of theses or other significant works of higher degree students (e.g. Masters and PhD level students). Excludes copies retained on student files.	Retain as Territory Archives
024.016.002 ■■■■■■■■■■■■■■■■■■■■	Records relating to significant ongoing or perpetual awards,(e.g. the Herbert Burton Medal, the Jessie Mary Vasey Scholarship, the Chancellor's Commendation, Institute Medals or the ACT and Region Chamber of Commerce and Industry Prize). Includes records of donors/sponsors, successful applications, nominations and supporting documents as well as records of the decision making process.	Retain as Territory Archives

Case Management (Continued)


The activity of managing an incident, person, organisation or client, on a case basis. Case management incorporates the process of assessment, planning, facilitation and advocacy for options and services to meet an individual's, organisation's or client's needs or outcomes. Includes processing of applications; authorisations and approvals; the establishment of a client; developing, implementing and monitoring case plans; the ongoing delivery and provision of services; finalisation of services and reviews of service delivery.

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For student work placements, use STUDENT MANAGEMENT – Training

For applications for Recognition of Prior Studies/Learning by apprentices and trainees, use STUDENT MANAGEMENT – Training.]

Entry No.	Description of Records	Disposal Action
024.016.005 	Records documenting individual students and home schooling/tuition students schooling history, including: <ul style="list-style-type: none"> • personal details; • student Application for Award; • copies of certificates, statements of achievement (e.g. Year 10, Year 12 certificates and similar); • reports about student progress; • correspondence to/from parents; • copies of accident reports; • administration forms; • absence notes and correspondence relating to absenteeism; • copies of incident reports; • records of suspension; • disciplinary records; • religious instruction forms; • health records; • transfer notes; • notification of students of their eligibility to graduate; • Obligation Certificates; • receipt/delivery or non-collection of testamurs • student enrolment records post 1984. 	Destroy 25 years after date of birth, or 7 years after last action, whichever is later

Note: Individual student records do not necessarily have to contain all of the above nor is the above list exhaustive of the types of information student records may contain.

Ceremonies (Continued)

The activities associated with arranging and managing a formal act performed for a special occasion.

[For addresses made at ceremonies, use STUDENT MANAGEMENT - Addresses (presentations).

For arrangements relating to ceremonies, use STUDENT MANAGEMENT – Arrangements.

For managing financial transactions supporting ceremonies, use FINANCE & TREASURY MANAGEMENT - Accounting.]

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.018.002 ■■■■■■■■■■■■■■■■■■■■	Programs, invitations, guest lists and photographs relating to ceremonies that are routine or do not mark a special occasion, (e.g. graduation ceremonies or ceremonies of lesser significance).	Destroy 3 years after last action

Committees

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.020.001 ■■■■■■■■■■■■■■■■■■■■	Records relating to high-level external and internal committees formed to manage or advise on major decisions affecting the management of students. Includes final versions of documents: <ul style="list-style-type: none">• establishing the committee;• terms of reference;• appointment of members;• minutes;• reports;• recommendations; and• supporting documents such as briefing and discussion papers.	Retain as Territory Archives

Committees (Continued)

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.020.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting declarations of members' private interests.	Destroy 7 years after termination of appointment
024.020.003 ■■■■■■■■■■■■■■■■■■■■	Records documenting routine or minor external or internal committees formed to consider specific matters related to academic policy and practices or day-to-day administration of students. Includes final versions of: <ul style="list-style-type: none">• documents establishing the committee;• terms of reference;• appointment of members;• minutes;• reports;• recommendations;• supporting documents such as briefing and discussion papers;• agenda;• notice of meetings;• draft minutes;• room bookings;• working papers;• records documenting administration of committees.	Destroy 5 years after last action

Compliance

The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements. Includes compliance with legislation and with national and international standards, such as the ISO 9000 series.

Entry No.	Description of Records	Disposal Action
024.021.001 ■■■■■■■■■■■■■■■■■■■■	Records relating to student attendance. Includes class roll but excludes aggregate reports. <i>[For aggregate reports see class 024.021.003]</i>	Retain as Territory Archives
024.021.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting agency or service provider’s compliance with mandatory or optional standards or with statutory requirements.	Destroy 7 years after last action
024.021.003 ■■■■■■■■■■■■■■■■■■■■	Data and aggregate reporting generated from the student attendance records presented by any sub-category such as key learning area, school, school district and Territory-wide etc. including: <ul style="list-style-type: none">• all students;• disabilities;• gender;• country or rural areas;• backgrounds of poverty or low social status;• Aboriginal or Torres Strait Islander heritage;• language background is other than English;• gifted / talented students;• similarly specified groupings.	Destroy 2 years after action completed
024.021.004 ■■■■■■■■■■■■■■■■■■■■	Attendance lists for examinations or events.	Destroy 2 years after action completed

Counselling

The activities associated with giving advice or guidance to an employee or client for various reasons.

[For student medical and dental records, including psychological records, use HEALTH CARE & TREATMENT.]

Entry No.	Description of Records	Disposal Action
024.029.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting the provision of assistance for students to deal with behavioural, personal, relationship, study and adjustment issues where the person was less than 18 years at the date of the last entry in the record including sensitive or in-confidence school records. Includes: <ul style="list-style-type: none">• special assistance case files;• student special needs reports;• principal/teacher/student records.	Destroy 25 years after date of birth, or 7 years after last action, whichever is later
024.029.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting the provision of assistance for students to deal with behavioural, relationship, study and adjustment issues where the person was 18 years or older at the date of last entry in the record. <ul style="list-style-type: none">• special assistance case files;• student special needs reports;• sensitive or in-confidence principal/teacher/student records.	Destroy 7 years after last action

Discipline

The activities and actions associated with the disciplinary process. Includes investigation, charges, formal inquiries and punishment.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.033.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting allegations of misconduct which are investigated, either by the agency or an external authority, and where allegations are proved to be unfounded and the person has requested the retention of the records.	Destroy 75 years after date of birth or 7 years after last action, whichever is the later
024.033.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting allegations of misconduct which are investigated, either by the agency or an external authority where allegations are proven to be either founded or unfounded and the person has <u>not</u> requested the retention of the records or where no follow-up investigation is made (i.e. where allegations are proved to be frivolous or vexatious).	Destroy 7 years after last action

Enquiries

The activities associated with handling requests for information about the agency and its services, programs and activities.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.040.001 ■■■■■■■■■■■■■■■■■■■■	Records handling public enquiries relating to student and education services, including enquiries about accommodation, student admissions and childcare.	Destroy 2 years after last action

Evaluation

The process of determining the suitability of potential or existing programs, items of equipment, systems or services in relation to meeting the needs of the given situation. Includes systems analysis and ongoing monitoring.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.042.001 ■■■■■■■■■■■■■■■■■■■■	Final versions of external and internal reports resulting from the evaluation of potential or existing services provided to students and associated systems.	Retain as Territory Archives
024.042.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting the ongoing monitoring of existing services provided to students and associated systems. Includes working papers supporting the development of external or internal reports and the evaluation of student services and supporting systems.	Destroy 3 years after last action

Events

The activities relating to the arranging and staging of events. Includes support for local suppliers and organisations to attend, display or promote (e.g. trade displays, Christmas pageants, Canberra Show). Also includes events arranged and staged by agencies (e.g. open days, land sales, Floriade).

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.043.001 ■■■■■■■■■■■■■■■■■■■■	Records relating to the organisation and staging of events and celebrations of local, state or national significance or those organised to mark major anniversaries of significant people, structures or events. Includes major local, state or national sporting or athletic events.	Retain as Territory Archives
024.043.002 ■■■■■■■■■■■■■■■■■■■■	Records relating to the management of arrangements, promotions, displays, community liaison or schedules for regular and routine events organised by the agency. Includes sporting or athletic events with little significance to the agency or Territory.	Destroy 5 years after last action

Grant Funding

The activities associated with the application for and receipt of grants.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.049.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting successful and unsuccessful applications made by the agency or students for grant funding from a government or non-government sources. Includes scholarships. <i>[For the management of grant money received by the agency, use FINANCE & TREASURY MANAGEMENT - Funding Administration.]</i>	Destroy 7 years after last action

Grievances

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, equipment, promotion, or higher duties.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.051.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting formal grievances lodged by a student or parent/guardian and considered either internally within the organisation or by an external body. Includes: <ul style="list-style-type: none">• notes of meetings;• reports;• recommendations. <i>[For records covering disciplinary action against a student resulting from a grievance, use STUDENT MANAGEMENT - Discipline.</i> <i>For records covering disciplinary action against a staff member resulting from a grievance, use HUMAN RESOURCES - Performance management.]</i>	Destroy 25 years after last action

Health Promotion

The process of promotion of programs which encourage the establishment and maintenance of a healthy environment and which encourage healthy lifestyles. Includes workplace environments.

Entry No.	Description of Records	Disposal Action
024.052.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting the promotion of health, first aid programs and the management of sick bay's in educational facilities. Includes the development and distribution of: <ul style="list-style-type: none">• notices;• instructions;• posters;• other promotional material.	Destroy 5 years after last action

Implementation

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

Entry No.	Description of Records	Disposal Action
024.053.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting the implementation of plans, policies and procedures developed to support the management of students and services provided.	Destroy 5 years after last action

Liaison

The activities associated with maintaining regular general contact between the agency and professional associations, professionals in related fields, other agencies, 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.

Entry No.	Description of Records	Disposal Action
024.067.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting liaison activities undertaken with professional associations, private sector organisations, community groups and student groups. Includes collaboration on projects and exchanges of information.	Destroy 3 years after last action

Meetings

The activities associated with regular or ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the function. Includes staff meetings, arrangements, agenda, taking of minutes etc. Excludes committee meetings.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.072.001 ■■■■■■■■■■■■■■■■■■■■	Final version of minutes and supporting documents tabled at meetings. Includes meetings with external agencies, working papers documenting the conduct and administration of meetings including: <ul style="list-style-type: none">• agendas;• notices of meetings; and• draft minutes.	Destroy 3 years after last action

Payments

The activities involved in the preparation and payment of money.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.077.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting payments of fees and educational charges, including: <ul style="list-style-type: none">• statutory declarations completed by students;• applications for concessions;• concessions agreements;• refunds (completed by student);• student sponsorship authority• bad debt investigations;• payments by instalment, (e.g. Payment by Instalment forms; and Payment Plan for Academy of Interactive Entertainment (AIE) and Degree students);• amenities and service fees, including options, waivers or extensions; and• HECS/PELS schemes including options or exemptions.	Destroy 7 years after last action

[For records relating to invoices, payments/receipts, credit notes, debt recovery, etc., use FINANCE & TREASURY MANAGEMENT – Accounting.]



Service Provision

The activities relating to services provided by an agency on a long term basis or by other agencies. Includes requests and applications for services, assessment of eligibility and entitlements, liaison with other agencies regarding the provision of services. Also includes activities to lobby for services and to increase service provision. Also includes the installation, operation and removal of temporary facilities in parks and reserves, such as water, electricity, temporary toilets, etc. for special outdoor events.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.169.001 ████████████████████	Records documenting applications for the provision of accommodation services to students through halls of residence or residential facilities where the application was successful, including accommodation contracts with students, administrative issues such as unauthorised tenancy or noise abatement.	Destroy 7 years after completion or other termination of agreement or contract
024.169.002 ████████████████████	Records documenting the provision of chaplaincy services, including appointment of chaplains and recommendations or nominations by religious bodies.	Destroy 5 years after appointment terminated
024.169.003 ████████████████████	Records relating to withdrawn or unsuccessful applications for the provision of accommodation services to students and other residents.	Destroy 2 years after last action

Service Provision (Continued)

The activities relating to services provided by an agency on a long term basis or by other agencies. Includes requests and applications for services, assessment of eligibility and entitlements, liaison with other agencies regarding the provision of services. Also includes activities to lobby for services and to increase service provision. Also includes the installation, operation and removal of temporary facilities in parks and reserves, such as water, electricity, temporary toilets, etc. for special outdoor events.

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.169.004 	Records relating to the provision of child care places. Includes: <ul style="list-style-type: none">● applications,● enrolment waiting lists;● interviews,● acceptance of places, or● standard agreements. <p><i>[For records relating to financial agreements, use FINANCE & TREASURY MANAGEMENT – Acquisition or FINANCE & TREASURY MANAGEMENT - Contract Management.]</i></p>	Destroy 2 years after last action
024.169.005 	Records relating to requests for and the administration of academic transcripts. Includes: <ul style="list-style-type: none">● authority to release results;● applications for official transcripts;● unofficial transcripts;● results notice.	Destroy 2 years after last action

Training (Continued)

The activities associated with all aspects of the provision of training and development (external/internal).

[For records relating to arranging, completing and assessing student training, use TRAINING & TERTIARY EDUCATION – Training.]

Entry No.	Description of Records	Disposal Action
024.105.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting commencement, completion or partial completion of traineeships and apprenticeships. Includes: <ul style="list-style-type: none">• ability to offer on-the-job training;• absenteeism industry visits;• apprentice/trainee training program plans;• certificates of competence;• certification process;• declared vocations;• document transcript requests• employer sign-off letter releasing apprentice;• industry contacts;• industry visits;• log book copies;• notifications of absences;• notifications of business;• pre-training package validation of apprenticeship qualifications;• qualifications;• statements of attainment;• training contracts/agreements;• variations to traineeship or apprenticeship contracts/agreements.	Destroy 30 years after completion of apprenticeship or traineeship
024.105.003 ■■■■■■■■■■■■■■■■■■■■	Traineeship and Apprentice reports and surveys relating to traineeships and apprenticeships.	Destroy 25 years after date of birth or 7 years after last action whichever is later

Training (Continued)

The activities associated with all aspects of the provision of training and development (external/internal).

[For records relating to arranging, completing and assessing student training, use TRAINING & TERTIARY EDUCATION – Training.]

Entry No.	Description of Records	Disposal Action
024.105.004 ■■■■■■■■■■■■■■■■■■■■	Records relating to student work experience placements. Includes: <ul style="list-style-type: none">• registration of placements;• work experience agreement forms;• work placement offers;• workplace responses;• work experience applications;• teacher evaluation forms;• employers reports.	Destroy 25 years after date of birth or 7 years after last action whichever is later
024.105.005 ■■■■■■■■■■■■■■■■■■■■	Records relating to applications/requests for and/or approval of or credit/status for Recognition of Prior Studies/Learning. Includes: <ul style="list-style-type: none">• application forms and supporting documents;• interview records;• correspondence.	Destroy 7 years after action completed

Visits

The activities involved in arranging visits by other agencies, the public and students to the agency, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by staff to other agencies, organisations, etc. Also includes arranging student camps and excursions to other destinations.

Entry No.	Description of Records	Disposal Action
024.109.001 ■■■■■■■■■■■■■■■■■■■■	Records relating to excursions and camps, including excursions overseas, by both students and teachers that proceed. Includes: <ul style="list-style-type: none"> • applications; • costs; • supporting documentation; • advice to parents/caregivers; • approval letters; • permission forms including student details; • movement requisitions for teachers; • travel details. • requests for financial assistance. 	Destroy 25 years after date of birth, or 7 years after last action, whichever is later
024.109.002 ■■■■■■■■■■■■■■■■■■■■	Records documenting arrangements for visits made to ACT Government educational institutions by important community representatives. Includes Public visitor books. [For visitor books signed by Royalty or Heads of State, use GOVERNMENT & STAKEHOLDER RELATIONS - Events.]	Destroy 5 years after last action
024.109.003 ■■■■■■■■■■■■■■■■■■■■	Records documenting arrangements for visits or tours to ACT Government educational institutions by the general public.	Destroy 2 years after last action
024.109.004 ■■■■■■■■■■■■■■■■■■■■	Records documenting visits by staff to community groups or organisations to promote the services provided to students. Includes visit reports.	Destroy 2 years after last action
024.109.005 ■■■■■■■■■■■■■■■■■■■■	Records relating to excursions or camps by both students and teachers that do not proceed. Includes: <ul style="list-style-type: none"> • applications; • supporting documentation; • requests for financial assistance. 	Destroy 2 years after last action

RETAIN AS TERRITORY ARCHIVES

STUDENT MANAGEMENT

The function of managing students by supporting them throughout their attendance at schools and tertiary educational institutions and assisting them to undertake and successfully complete their studies. Includes matters affecting the safety, health and general welfare of students such as domestic violence (child abuse), drug abuse, and support services and programs such as immunisations, counselling, medical assessment and distance education arrangements provided by the agency to meet the needs of students. Also includes admissions, enrolment, exchange programs, misconduct processes, graduation, prizes and scholarships, and the provision of residential facilities or placements.

Addresses (presentations)

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.004.001 ■■■■■■■■■■■■■■■■■■■■	Final version of addresses made by the chief Minister or portfolio Minister or senior agency officers at major public occasions.	Retain as Territory Archives

Advice

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

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.005.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting the development and provision of advice or the receipt of advice relating to the management of students that resulted in major changes to the agency's policies, procedures or caused considerable controversy. Includes advice provided by consultants and working papers.	Retain as Territory Archives

Case Management (Continued)

The activity of managing an incident, person, organisation or client, on a case basis. Case management incorporates the process of assessment, planning, facilitation and advocacy for options and services to meet an individual's, organisation's or client's needs or outcomes. Includes processing of applications; authorisations and approvals; the establishment of a client; developing, implementing and monitoring case plans; the ongoing delivery and provision of services; finalisation of services and reviews of service delivery.

[For appeals of decisions, use STUDENT MANAGEMENT – Appeals (decisions).

For examination and test results of apprentices and trainees, use STUDENT MANAGEMENT – Training.

For student work placements, use STUDENT MANAGEMENT – Training

For applications for Recognition of Prior Studies/Learning by apprentices and trainees, use STUDENT MANAGEMENT – Training.]

Entry No.	Description of Records	Disposal Action
024.016.002 ■■■■■■■■■■■■■■■■■■■■	Records relating to significant ongoing or perpetual awards,(e.g. the Herbert Burton Medal, the Jessie Mary Vasey Scholarship, the Chancellor's Commendation, Institute Medals or the ACT and Region Chamber of Commerce and Industry Prize). Includes records of donors/sponsors, successful applications, nominations and supporting documents as well as records of the decision making process.	Retain as Territory Archives

Celebrations

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

[For addresses made at celebrations, use STUDENT MANAGEMENT – Addresses (presentations).

For managing financial transactions supporting celebrations activities, use FINANCE & TREASURY MANAGEMENT – Accounting.]

Entry No.	Description of Records	Disposal Action
024.017.001 ■■■■■■■■■■■■■■■■■■■■	Programs, invitations, guest lists and photographs relating to celebratory festivities held to honour an event of major importance (e.g. a significant anniversary).	Retain as Territory Archives

Training

The activities associated with all aspects of the provision of training and development (external/internal).

[For records relating to arranging, completing and assessing student training, use TRAINING & TERTIARY EDUCATION – Training.]

<i>Entry No.</i>	<i>Description of Records</i>	<i>Disposal Action</i>
024.105.001 ■■■■■■■■■■■■■■■■■■■■	Records documenting individual apprentices and trainees examination results, including academic transcripts/final results, examination assessment returns or results sheets and amendments to examination returns.	Retain as Territory Archives

SCHEDULE OF AMENDMENTS – this information is provided for the assistance of users but does not form part of the Notifiable Instrument.

Amendments to the Student Management Records Disposal Schedule

Dated July 2016

Function (Amendments)

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New Features (Insertions)

Activity	Entry no.	Description
Arrangements	024.011.001 024.011.002 024.011.003 024.011.004	New classes.
Case Management	024.016.001 024.016.002 024.016.003 024.016.004 024.016.006 024.016.007	New classes.
Registration	024.155.001	New class.
Training	024.105.001 024.105.004 024.105.005	New classes.

Enhancements (Changes)

Activity	Entry no.	Description
Arrangements		Scope note changed.
Case Management		Classification guides added to scope note.
Case Management	024.016.005	Additional record descriptions added to class list of included records.
Ceremonies	024.018.002	Graduation ceremonies records added to class list of included records. Classification guide added to scope note.
Discipline	024.033.002	Class description changed.
Representatives	024.090.001	Records documenting student appointments added to class description.