

## OCCUPATIONAL HEALTH & SAFETY (OH&S)

The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation. Includes safety, occupational hygiene, ergonomic, occupational medicine and first aid measures together with policy, procedural and monitoring matters associated with the organisations' preventive and curative OH&S program. Includes the establishment of committees to investigate and advise on health and safety issues in the workplace.

### 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.

Class No	Description of records	Disposal action
1619 ■■■■■■■■	Accident/incident reports and supporting documentation of death, serious personal injury, dangerous occurrences and incapacity to Commonwealth employees and the public within the workplace. Includes accident registers.  <i>[For copies of accident reports for employees where a compensation claim is made, use COMPENSATION - Cases. For copies of accident reports where an employee is injured but no compensation claim is lodged, use PERSONNEL - Accidents.]</i>	Destroy 30 years after last action
1620 ■■■■■■■■	All other accident/incident reports for Commonwealth employees retained for agency OH&S assessment purposes.	Destroy 7 years after last action
1621 ■■■■■■■■	Accident/incident reports of personal injuries to members of the public aged under 18 years, not resulting in claims for compensation.  <i>[For copies of accident reports where a claim for compensation is submitted by a member of the public following an accident, use COMPENSATION - Claims.]</i>	Destroy when person reaches 25 years of age, or 7 years after last action, whichever is later
1622 ■■■■■■■■	Accident/incident reports of personal injuries to members of the public aged over 18 years, not resulting in claims for compensation.  <i>[For copies of accident reports where a claim for compensation is submitted by a member of the public following an accident, use COMPENSATION - Claims.]</i>	Destroy 7 years after last action

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### Advice

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

Class No	Description of records	Disposal action
1623 ■■■■■■■■	Records relating to the receipt and provision of advice on the OH&S function.	Destroy 2 years after action completed

*[For the distribution of promotional material to employees, use OH&S - Health Promotion.*

*[For legal advice on OH&S matters, use LEGAL SERVICES - Advice.]*

### Agreements

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

Class No	Description of records	Disposal action
1624 ■■■■■■■■	Final version of an agency OH&S agreement.	Destroy 5 years after agreement is superseded
1625 ■■■■■■■■	Records documenting negotiations for and establishment, maintenance and review of an agency OH&S agreement.	Destroy 5 years after agreement is superseded

### Appeals (decisions)

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

Class No	Description of records	Disposal action
1626 ■■■■■■■■	Records documenting an appeal made by the agency against an investigator's decision on a health and safety matter to the Australian Industrial Relations Commission.	Destroy 5 years after action completed

*[For any legal advice received on the conduct of the appeal, use LEGAL SERVICES - Advice.]*

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### Audit

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

*For inspections, use OH&S - Inspections.*

Class No	Description of records	Disposal action
1627 ■■■■■■■■	Final reports of health and safety audits conducted by an external authority or internally by the agency.	Destroy 5 years after action completed
1628 ■■■■■■■■	Records documenting the planning and conduct of external and internal audits relating to the OH&S function. Includes: <ul style="list-style-type: none"> <li>• liaison with the auditing body;</li> <li>• minutes of meetings;</li> <li>• notes taken at opening and exit interviews;</li> <li>• draft report; and</li> <li>• comments.</li> </ul>	Destroy 5 years after action completed

### Authorisation

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

Class No	Description of records	Disposal action
1629 ■■■■■■■■	Delegations of power to agency staff to authorise administrative action relating to the OH&S function.	Destroy 5 years after delegation superseded
1630 ■■■■■■■■	Authorisations for administrative actions relating to the OH&S function.	Destroy 5 years after action completed

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### Cases

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.

Class No	Description of records	Disposal action
1631 ■■■■■■■■■■	Records documenting medical examinations of employees which are undertaken for health surveillance purposes as prescribed under the Occupational Health and Safety (Commonwealth Employment) Act 1991.	Destroy in the year 2040 or 75 years after date of birth whichever is later

*[For recording potential exposure to hazardous substances, including asbestos, or for records detailing that an employee was employed at places identified as containing a hazardous substance, use PERSONNEL - Employment Conditions.]*

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### Committees

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

*For selection or election of employee representatives to a Health & Safety Committee and the nomination of union representatives, use OH&S - Representatives.*

Class No	Description of records	Disposal action
1632 ■■■■■■■■■	Records of health and safety committees. Includes: <ul style="list-style-type: none"> <li>• documents establishing the committee;</li> <li>• final versions of minutes;</li> <li>• reports;</li> <li>• recommendations; and</li> <li>• supporting documents such as briefing papers and discussion papers.</li> </ul>	Destroy 5 years after action completed
1633 ■■■■■■■■■	Records of other internal committees and external committees convened by other agencies or organisations to consider general matters relating to the OH&S function. Includes: <ul style="list-style-type: none"> <li>• documents establishing the committee;</li> <li>• final versions of minutes;</li> <li>• reports;</li> <li>• recommendations; and</li> <li>• supporting documents such as briefing papers and discussion papers.</li> </ul>	Destroy 5 years after action completed
1634 ■■■■■■■■■	Working papers documenting the conduct and administration of all committees formed to consider general matters relating to the OH&S function. Includes: <ul style="list-style-type: none"> <li>• agenda;</li> <li>• notices of minutes;</li> <li>• draft minutes; and</li> <li>• arrangements with unions.</li> </ul>	Destroy when reference ceases

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### Compliance

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 the ISO 9000 series.

*For a risk assessment undertaken for hazardous substances, use OH&S - Risk Management.*

*For health surveillance of individual employees exposed to hazardous substances, use OH&S - Cases.*

*For the training of staff in handling hazardous substances, use STAFF DEVELOPMENT - Training.*

Class No	Description of records	Disposal action
1635 ■■■■■■■■	Records documenting compliance with provisions of the Occupational Health and Safety (Commonwealth Employment) Act 1991 and the Occupational Health and Safety (Commonwealth Employment) (National Standards) Regulations such as: <ul style="list-style-type: none"> <li>• plant testing and maintenance; and</li> <li>• applications for the registration of the design of plant.</li> </ul>	Destroy when the need for compliance ceases (eg when plant is disposed of)
1636 ■■■■■■■■	Records documenting the licensing processes for the operation of plant items.	Destroy when licence expires
1637 ■■■■■■■■	Records documenting the identification and control of access to confined spaces.	Destroy 5 years after space is no longer accessed
1638 ■■■■■■■■	All notices issued under the Occupational Health and Safety (Commonwealth Employment) Act 1991 (eg Provisional Improvement Notices).	Destroy 5 years after notice lapses
1639 ■■■■■■■■	Records documenting environmental monitoring of hazardous substances listed in Schedule 2 of the Occupational Health and Safety (Commonwealth Employment) (National Standards) Regulations.	Destroy 75 years after last action
1640 ■■■■■■■■	Hazardous substance register (including asbestos register) identifying substance properties and details of their condition.	Destroy 75 years after last entry

*[For the inspection of hazardous substances including asbestos, use OH&S - Inspections.]*

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### Compliance - Continued

Class No	Description of records	Disposal action
1641 ■■■■■■■■■■	Records documenting the payment of the annual compulsory contribution supporting the administration of the Occupational Health and Safety (Commonwealth Employment) Act 1991 required under Part 4A.	Destroy 10 years after action completed

### Contracting-out

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

*For information on records issues relating to outsourcing and contracting-out see General Disposal Authority 25.*

Class No	Description of Records	Disposal Action
N/A	<i>[For records documenting contract management relating to the OH&amp;S function, use PROCUREMENT – Contracting-out.</i>	N/A

### 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.

Class No	Description of records	Disposal action
1643 ■■■■■■■■■■	Records documenting the evaluation of OH&S programs and services in an agency. Includes the development of performance indicators.	Destroy 5 years after last action

*[For the evaluation of goods and services being considered for procurement in support of the OH&S function, use PROCUREMENT – Evaluation.]*

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### Health Promotion

The process of promotion by the organisation of programs which encourage the establishment and maintenance of a healthy work environment.

*For records documenting the treatment or health surveillance of individual employees, use OH&S - Cases.*

Class No	Description of records	Disposal action
1644 ■■■■■■■■■■	Records documenting the management of an agency's first aid centres and occupational health centres and facilities (eg Gymnasiums). Includes: <ul style="list-style-type: none"> <li>• appointment books;</li> <li>• drug and x-ray registers; and</li> <li>• statistical summaries of operations.</li> </ul> <p><i>[For the appointment of first aid officers use, OH&amp;S - Representatives.</i></p> <p><i>For the provision of first aid treatment to individuals, use OH&amp;S - Implementation.</i></p> <p><i>For the equipping of the centres including the supply of medical stores and equipment, use PROCUREMENT - Acquisition, and PROPERTY MANAGEMENT - Fit-outs.</i></p> <p><i>For the maintenance of equipment (eg autoclaves and the replenishment of first aid kits) use EQUIPMENT &amp; STORES - Maintenance.]</i></p>	Destroy 5 years after last action
1645 ■■■■■■■■■■	Records documenting the promotion of safe work practices in the workplace. Includes the development and distribution of notices, instructions, posters and other promotional material. <p><i>[For the provision of OH&amp;S training to staff, managers and OH&amp;S Representatives, use STAFF DEVELOPMENT - Training.</i></p> <p><i>For the production process for any advertising material produced by the agency, use PUBLICATION - Production.]</i></p>	Destroy 5 years after action completed
1646 ■■■■■■■■■■	Material safety data sheets (MSDS)	Destroy when hazardous material is disposed of



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### Implementation

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

Class No	Description of records	Disposal action
1647 ■■■■■■■■■■	Records documenting the provision of first aid treatment to individual employees.	Destroy 5 years after last action

*[For records relating to the management of a first aid centre, use OH&S - Health Promotion.]*

### Inquiries

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, submissions or staff.

Class No	Description of records	Disposal action
1648 ■■■■■■■■■■	Records documenting an inquiry into an agency's performance of the OH&S function.	Destroy 10 years after action completed

*[For any legal advice provided to support the agency during the inquiry process, use LEGAL SERVICES - Advice.]*

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### Inspections

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

*For audits, use OH&S - Audits.*

Class No	Description of records	Disposal action
1649 ■■■■■■■■	Records documenting an OH&S inspection resulting from a major accident in the workplace (eg accidents causing fatalities, serious injuries or dangerous occurrences). Includes documents detailing complaints lodged by agencies about the way the investigation was carried out by the lead agency (currently Comcare).	Destroy 75 years after last action
1650 ■■■■■■■■	Records documenting routine OH&S inspections carried out under the Commonwealth's lead agency for the function (currently Comcare) Planned Investigation Program and/or self-audit program, or as a result of a safety dispute in the workplace. Includes copies of notices issued, copies of reports, and agency responses. Also includes copies of Provisional Improvement Notices (PINS) and records detailing complaints about the way an investigation was carried out.	Destroy 10 years after last action
	<i>[For records relating to an industrial dispute undertaken in respect of an OH&amp;S inspection, use INDUSTRIAL RELATIONS - Inspections.]</i>	
1651 ■■■■■■■■	Records documenting routine inspections of hazardous substances in the workplace.	Destroy 75 years after last action
	<i>[For the hazardous substance and asbestos registers, use OH&amp;S - Compliance.</i>	
	<i>For monitoring and risk assessment, use OH&amp;S - Risk Management.</i>	
	<i>For inspections to determine the presence of asbestos or other hazardous materials, use PROPERTY MANAGEMENT - Inspections.</i>	
	<i>For the removal and disposal of asbestos and other hazardous substances, use PROPERTY MANAGEMENT - Maintenance.]</i>	

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### Meetings

The activities associated with ad hoc 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. Excludes committee meetings.

Class No	Description of records	Disposal action
1652 ■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held to support the OH&S function. Includes meetings with external agencies.	Destroy 5 years after action completed
1653 ■■■■■■■■	Working papers documenting the conduct and administration of meetings to support the OH&S function. Includes agenda, notices of meetings and draft minutes.	Destroy when reference ceases

### Planning

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

Class No	Description of records	Disposal action
1654 ■■■■■■■■	Final versions of agency-wide OH&S plans. Includes: <ul style="list-style-type: none"> <li>• OH&amp;S plan; and</li> <li>• Asbestos management plan.</li> </ul>	Destroy 5 years after plan is superseded
1655 ■■■■■■■■	Working papers used in developing agency-wide OH&S plans. Includes draft plans, reports analysing issues, and comments received from other areas of the agency.	Destroy 3 years after adoption of the final plan
1656 ■■■■■■■■	Copies of all OH&S plans.	Destroy when reference ceases

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### Policy

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

Class No	Description of records	Disposal action
1657 ■■■■■■■■	Records documenting the development and establishment of an agency's OH&S policy. Includes: <ul style="list-style-type: none"> <li>• policy proposals;</li> <li>• results of consultations with unions and employees;</li> <li>• research papers;</li> <li>• supporting reports;</li> <li>• major drafts; and</li> <li>• the final document.</li> </ul> <p><i>[For the development and review of the agency's OH&amp;S agreement, use OH&amp;S - Agreements.</i></p> <p><i>For the development and review of the agency's OH&amp;S plan, use OH&amp;S - Planning.]</i></p>	Destroy 5 years after policy is superseded
1658 ■■■■■■■■	Records documenting the development and establishment of an agency asbestos policy. Includes: <ul style="list-style-type: none"> <li>• policy proposals;</li> <li>• results of consultations;</li> <li>• research papers;</li> <li>• supporting reports;</li> <li>• major drafts; and</li> <li>• final policy documents.</li> </ul>	Destroy 75 years after removal of asbestos
1659 ■■■■■■■■	Records documenting comments made on the development of government-wide OH&S policies.	Destroy 3 years after promulgation of the new policy
1660 ■■■■■■■■	Working papers documenting the development of all agency-wide OH&S policies. Includes drafts and input from other areas of the agency.	Destroy when reference ceases
1661 ■■■■■■■■	Copies of policy documents and supporting papers.	Destroy when reference ceases

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### Procedures

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

Class No	Description of records	Disposal action
1662 ■■■■■■■■	Master set of agency manuals, handbooks, directives etc detailing OH&S requirements for specific tasks and work procedures.  <i>[For records relating to emergency procedures, use PROPERTY MANAGEMENT - Procedures.]</i>	Destroy 75 years after procedures are superseded
1663 ■■■■■■■■	Master set of other agency manuals, handbooks, directives etc detailing routine procedures supporting the OH&S function. Includes registers of legal responsibilities under OH&S.	Destroy 5 years after action completed
1664 ■■■■■■■■	Records documenting the development of agency procedures supporting the OH&S function.	Destroy 5 years after production of procedures
1665 ■■■■■■■■	Copies of manuals, handbooks, directives etc.	Destroy when reference ceases

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### Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies), and to provide formal statements or findings of the results of the examination or investigation. Includes agenda, briefing, business, discussion papers, proposals, reports, reviews and returns.

Class No	Description of records	Disposal action
1666 ■■■■■■■■■■	Final copies of other reports, both formal and periodic, produced to support the OH&S function.  <i>[For all accident reports sent to the lead agency (currently Comcare), use OH&amp;S - Accidents.  For copies of accident report forms where a compensation claim is made, use COMPENSATION - Cases.  For copies of accident report forms where an employee is injured but no compensation claim is lodged, use PERSONNEL - Accidents.  For copies of accident reports where compensation is claimed by a member of the public following an accident, use COMPENSATION - Claims.]</i>	Destroy 7 years after action completed
1667 ■■■■■■■■■■	Working papers documenting the development of all reports. Includes drafts and comments received.	Destroy when reference ceases
1668 ■■■■■■■■■■	Copies of OH&S reports.	Destroy when reference ceases

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### Representatives

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

*For the training of first aid officers, fire wardens and safety officers etc, use STAFF DEVELOPMENT - Training.*

*For arranging first aid, fire and safety officer allowances etc, use PERSONNEL - Allowances.*

Class No	Description of records	Disposal action
1669 ■■■■■■■■	Records documenting the selection of an OH&S representative for a designated work group or to act as a first aid officer. Includes documentation on selection, lists of representatives, and resignation documentation.	Destroy 1 year after term of office expires or resignation of officer
1670 ■■■■■■■■	Records documenting the election of OH&S Committee representatives. Includes calling for nominations, managing the ballot and results.	Destroy 6 months after action completed
1671 ■■■■■■■■	Records documenting the appointment of first aid officers, fire wardens and safety officers etc. Includes letter of appointment, and details of roles and responsibilities.	Destroy 1 year after appointment lapses

### Research

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

Class No	Description of records	Disposal action
1672 ■■■■■■■■	Records documenting detailed research carried out to support the OH&S function (eg research on the properties of a hazardous substance).	Destroy 5 years after action completed
1673 ■■■■■■■■	Records documenting routine research carried out to support the OH&S function.	Destroy when reference ceases

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### Reviewing

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

*For the review of the agency's OH&S policy, use OH&S - Policy.*

*For the review of the agency's OH&S plan, use OH&S - Planning.*

*For the review of the agency's OH&S agreement, use OH&S - Agreements.*

*For the review of workplace hazards, use OH&S - Risk Management.*

Class No	Description of records	Disposal action
1674 ■■■■■■■■	Records documenting the review and monitoring of OH&S programs and operations. Includes documents establishing the review, final report and action plan.	Destroy 10 years after action completed
1675 ■■■■■■■■	Working papers documenting the conduct of an agency review and monitoring of OH&S programs and operations.	Destroy 3 years after action completed



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### Risk Management

The process involving identification of risks, likelihood and consequences of those risks and implementation of appropriate practice and procedures to treat the risks.

Class No	Description of records	Disposal action
1676 ■■■■■■■■	Records documenting risk management of all OH&S hazards including hazardous substances detailed in Schedule 2 of the Occupational Health and Safety (Commonwealth Employment) (National Standards) Regulations where risk assessments indicate risk to the employees and where health surveillance and/or monitoring of the employees is necessary. Includes documentation covering each stage of the process and action plans.	Destroy 75 years after last action
1677 ■■■■■■■■	Records documenting risk management of OH&S hazards where risk assessments indicate no risk to the employees and where no health surveillance and/or monitoring is required. Includes documentation covering each stage of the process, treatment schedules and action plans.	Destroy 30 years after last action
1678 ■■■■■■■■	OH&S risk register containing environmental monitoring and health surveillance data.	Destroy 75 years after last entry

*[For environmental monitoring, use OH&S - Compliance.*

*For health surveillance of employees, use OH&S - Cases.*

*For recording an employee's potential exposure to asbestos or employment at places identified as containing asbestos, use PERSONNEL - Employment Conditions.]*

### Standards

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

*For compliance with standards (except where other activities apply), use OH&S - Compliance.*

Class No	Description of records	Disposal action
1679 ■■■■■■■■	Records documenting the implementation of industry and agency standards to support the OH&S function (eg Approved Code of Practice for First Aid in Commonwealth Workplaces, and Australian Standard 1885.1 -1990 Workplace Injury and Disease Recording Standard).	Destroy 7 years after standards are superseded

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### Tendering

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

<b>Class No</b>	<b>Description of Records</b>	<b>Disposal Action</b>
N/A	<i>[For the acquisition of goods and services required to support the OH&amp;S function via a tender process, use PROCUREMENT - Tendering.]</i>	N/A