



**Australian Government**  

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**National Archives of Australia**

Records Authority

**CRS Australia**

Job no 2007/00440378

18 December 2007

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## INTRODUCTION

CRS Australia (formerly known as the Commonwealth Rehabilitation Service) and the National Archives of Australia have developed this Records Authority to set out the requirements for the retention or destruction of records for the functions of Service Development and Support and Vocational Rehabilitation, Disability and Injury Management. It represents a significant commitment on behalf of CRS Australia to understand, create and manage the records of its activities.

This Authority uses a classification scheme based on an analysis of the business of CRS Australia. It takes into account the agency's legal and organisational recordkeeping requirements, and the interests of stakeholders of both the agency and the National Archives. It provides a framework that may be used as a guide when creating and managing records that document this function.

This Authority gives CRS Australia the permission, required under the Archives Act 1983, for the disposal of the records described. The Authority sets the minimum length of time that classes of records need to be kept. Retention periods are based on an assessment of business needs, broader organisational accountability requirements and community expectations.

CRS Australia can use the following tools to dispose of their records:

- this Records Authority covering its agency specific records;
- general disposal authorities, such as the Administrative Functions Disposal Authority (AFDA), that covers functions and records common to every Commonwealth agency; and
- normal administrative practice (NAP) which allows for the destruction of records where the records are duplicated, unimportant or for short-term use only.

As changes in circumstances may affect future recordkeeping requirements, the periodic review of this Authority is recommended. All amendments must be approved by the National Archives.

Advice on using this Authority and other recordkeeping matters is available from the National Archives' website at [www.naa.gov.au](http://www.naa.gov.au) or by contacting the Agency Service Centre at [recordkeeping@naa.gov.au](mailto:recordkeeping@naa.gov.au) or (02) 6212 3610.

## APPLICATION OF THIS AUTHORITY

1. This Authority should be used in conjunction with the Administrative Functions Disposal Authority (AFDA) issued by the National Archives to cover administrative records common to most Commonwealth agencies.
2. This Authority should be used in conjunction with general disposal authorities issued by the National Archives that cover other types of records that may be created by CRS Australia such as encrypted records and source records that have been copied.
3. This Authority is to be used to sentence records. Sentencing involves the examination of records in order to identify the individual disposal class to which they belong. This process enables sentencers to determine the appropriate disposal action for the records. Advice on sentencing is available from the National Archives.
4. Where the method of recording information changes (for example from a manual system to an electronic system, or when information is migrated from one system to a new system) this Authority can still be used to sentence the records created, providing the records document the same function and activity. The information must be accessible for the period of time prescribed in this Authority. CRS Australia will need to ensure that any software, hardware or documentation required to enable continuing access to the data is available for the periods prescribed.
5. In general, retention requirements indicate a minimum period for retention. CRS Australia may extend minimum retention periods if it considers that there is an administrative need to do so. Where CRS Australia believes that its accountability will be substantially compromised because a retention period or periods are not adequate, it should contact the National Archives for review of the retention period.
6. CRS Australia may destroy certain records without the formal authorisation as a normal administrative practice. This usually occurs where the records are duplicated, unimportant or for short-term use only. It does not replace the records disposal arrangements agreed to in authorities. Advice and guidance on destroying records as a normal administrative practice is available from the National Archives' website at [www.naa.gov.au](http://www.naa.gov.au).
7. From time to time the National Archives places freezes' on the disposal of some groups of records, which places a moratorium on the destruction of these records. If you require further information about disposal freezes and whether they affect the application of this Authority, please contact the National Archives.
8. Records in the care of CRS Australia should be appropriately stored and preserved. CRS Australia needs to meet this obligation to ensure that the records remain authentic and accessible over time. Under section 31 of the Archives Act 1983, access arrangements are required for records that become available to the public after thirty years.
9. Appropriate arrangements should be made with the National Archives when records are to be transferred into custody. The National Archives accepts for transfer only those records designated as national archives.
10. Advice on how to use this Authority is available from the CRS Australia records manager. If there are problems with the application of the authority that cannot be resolved, please contact the National Archives.

## CONTACT INFORMATION

For assistance with this authority or for advice on other recordkeeping matters, please contact National Archives' Agency Service Centre.

Queen Victoria Terrace  
Parkes ACT 2600  
PO Box 7425  
Canberra Mail Centre ACT 2610

Tel: (02) 6212 3610  
Fax: (02) 6212 3989  
Email: [recordkeeping@naa.gov.au](mailto:recordkeeping@naa.gov.au)  
Website: [www.naa.gov.au](http://www.naa.gov.au)

# AUTHORISATION

## RECORDS AUTHORITY

**Person to whom notice of authorisation is given:**

Margaret Carmody  
General Manager  
CRS Australia  
Level 1  
216 Northbourne Avenue  
Braddon ACT 2612

**Purpose:**

AUTHORISES ARRANGEMENTS FOR THE DISPOSAL OF RECORDS IN ACCORDANCE WITH SECTION 24(2)(b) OF THE ARCHIVES ACT 1983

**Application:**

- \* SERVICE DELIVERY AND SUPPORT
- \* VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT

This authorisation applies to only the disposal of the records described on the authority in accordance with the disposal action specified on the authority. The authority will apply only if disposal takes place with the consent of the agency that is responsible at the time of disposal for the functions documented in the records concerned.

**Authorising Officer**

**Date of issue:**



18 December 2007

Ross Gibbs  
Director-General  
National Archives of Australia



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## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Accreditation

The activities involved in gaining and maintaining accreditation for the organisation and staff as providers of rehabilitation services, disability management, injury prevention and management services.

*For the quality assurance of service provision, use SERVICE DEVELOPMENT AND SUPPORT – Service Review and Improvement.*

Entry	Description of records	Disposal action
17836	Accredited Provider List.	Destroy 7 years after the final registered accreditation is superseded, terminated or expired
17837	Records documenting successful accreditation through an external agency. Includes applications, accreditation certificates or notices, reports, criteria, registration, audit plans and supporting papers.	Destroy 7 years after accreditation superseded or terminated, whichever is the later
17838	Records documenting unsuccessful accreditations.	Destroy 3 years after action completed
17839	Working papers relating to accreditation process.	Destroy 3 years after accreditation superseded

### Agreements

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

*Tip! Use for unit, regional or state level agreements with payers.*

*For national agreements such as the Department of Employment and Workplace Relations Memorandum of Understanding, use AFDA STRATEGIC MANAGEMENT - Agreements.*

*For agreements with individual clients for rehabilitation, disability and injury management, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT – Program Provision.*

Entry	Description of records	Disposal action
17954	Final versions of agreements made covering the service development and support function and supporting documents.	Destroy 7 years after expiry or other termination of agreement
17960	Signed deeds of release and deeds of indemnity and other similar agreements and supporting documents.	Destroy 7 years after indemnity ceases

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Agreements - Continued

Entry	Description of records	Disposal action
17961	Signed agreements and contracts under seal prior to 15 November 2005 resulting from tenders and supporting records: Western Australia.	Destroy 21 years after completion or other termination of contract
17962	Signed agreements and contracts under seal and supporting records: Victoria and South Australia.	Destroy 15 years after completion or other termination of contract
17963	Signed agreements and contracts under seal and supporting records: New South Wales, Queensland, Western Australia (from 15 November 2005), Tasmania, Australian Capital Territory and Northern Territory.	Destroy 12 years after completion or other termination of contract
17964	Simple signed contracts and agreements resulting from tenders and supporting records.	Destroy 7 years after completion or other termination of agreement or contract

### Authorisations

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

Entry	Description of records	Disposal action
17965	Delegations of powers to agency staff to authorise administrative action relating to the service development and support function.	Destroy 7 years after delegation superseded
17966	Authorisations for administrative actions relating to the service development and support function.	Destroy 7 years after authorisation superseded
17967	Copies of authorisations for administrative actions.	Destroy 3 years after authorisation has expired

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Committees

The activities associated with the management of committees and task forces (internal, external, private, local, State, Commonwealth, etc). Includes the Committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports, agenda, etc.

Entry	Description of records	Disposal action
17968	Records of internal and external committees formed to consider matters relating to the service development and support function. Includes: <ul style="list-style-type: none"> <li>• documents establishing the committee and its conduct</li> <li>• final versions of minutes</li> <li>• reports</li> <li>• recommendations</li> <li>• supporting documents such as briefing papers and discussion papers.</li> </ul>	Destroy 5 years after action completed
17969	Papers documenting the administration of committees which consider matters relating to the service development and support function. Includes: <ul style="list-style-type: none"> <li>• agenda</li> <li>• notices of meetings</li> <li>• draft minutes.</li> </ul>	Destroy 5 years after action completed

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Community Networking

The activities associated with the development of, and ongoing liaison with, networks within the community to support activities such as rehabilitation, disability management, injury prevention, employee assistance, employment and independent living. Includes networking and liaison with groups of employers and volunteer agencies.

*For liaison with professional bodies not involved in providing rehabilitation services to agency clients, use AFDA COMMUNITY RELATIONS - Liaison.*

*For the establishment of contracts relating to commercial services, use SERVICE DEVELOPMENT AND SUPPORT - Agreements.*

*For service tendering, use SERVICE DEVELOPMENT AND SUPPORT - Tendering.*

*For joint commercial and research ventures, use SERVICE DEVELOPMENT AND SUPPORT - Joint Ventures.*

Entry	Description of records	Disposal action
17970	Records documenting networking activities in support of the service development and support function. Includes initial contacts and ongoing liaison with potential employers and service providers.	Destroy 5 years after activity completed
17971	Records documenting details of network participants. Includes names, addresses and comments relating to the nature of network involvement and past services provided.	Destroy 5 years after cessation of involvement
17972	Records documenting marketing and promotion activities including advertising and publicity materials.	Destroy 5 years after activity completed

### Complaints Management

The activities involved in managing complaints relating to client service delivery. Includes reconsideration requests, internal program decision reviews and appeals resulting from service related decisions.

*For client feedback relating to service improvement, use SERVICE DEVELOPMENT AND SUPPORT – Service Review and Improvement.*

*For feedback from payers relating to client service delivery, use SERVICE DEVELOPMENT AND SUPPORT – Service Review and Improvement.*

Entry	Description of records	Disposal action
17973	Records documenting the management of client complaints relating to eligibility and services delivered to individual clients. Including client comments, service reviews, responses to the clients, reconsideration requests and related reports.	Destroy 7 years after complaint action has been concluded

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Complaints Management - Continued

Entry	Description of records	Disposal action
17974	Records documenting payer complaints relating to eligibility and services provided to individual clients. Including payer feedback, service reviews and related reports.	Destroy 7 years after complaint action has been concluded
17975	Records prepared in response to individual client appeals to a higher authority such as the Social Security Appeals Tribunal.	Destroy 7 years after appeal has been resolved
17976	Working papers relating to complaints management.	Destroy 3 years after complaint action has been concluded

### External Providers

The activities involved in identifying, engaging and managing the performance of work or the provision of goods and services by external providers requested by CRS.

*For agreements with customers, use SERVICE DEVELOPMENT AND SUPPORT – Agreements.*

*For agreements with external providers, use SERVICE DEVELOPMENT AND SUPPORT – Agreements.*

*For tendering for goods and services and related contract arrangements, use SERVICE DEVELOPMENT AND SUPPORT - Tendering.*

Entry	Description of records	Disposal action
17977	Records documenting the processes involved in identifying, engaging and managing external providers of goods and services. Includes registers of service providers.	Destroy 7 years after services completed or terminated

### Joint Ventures

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

Entry	Description of records	Disposal action
17978	Records documenting the management of joint ventures undertaken to support the service development and support function. Includes records relating to the establishment, maintenance and review of joint venture agreements and contracts.	Destroy 7 years after termination of arrangement

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Joint Ventures - Continued

Entry	Description of records	Disposal action
17979	Signed agreements and contracts under seal prior to 15 November 2005 resulting from tenders and supporting records: Western Australia.	Destroy 21 years after completion or other termination of contract
17980	Signed joint venture contracts under seal resulting from tenders and supporting records: Victoria and South Australia.	Destroy 15 years after completion or other termination of contract
17981	Signed agreements and contracts under seal and supporting records: New South Wales, Queensland, Western Australia (from 15 November 2005), Tasmania, Australian Capital Territory and Northern Territory.	Destroy 12 years after completion or other termination of contract
17982	Signed simple joint venture contracts and agreements and supporting records.	Destroy 7 years after completion or other termination of contract

### Meetings

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

For meeting of committees, use SERVICE DEVELOPMENT AND SUPPORT - Committees.

Entry	Description of records	Disposal action
17983	Final version of minutes and supporting documents tabled at meetings held to support the service development and support function. Includes meetings with external agencies.	Destroy 5 years after action completed
17984	Working papers documenting the conduct and administration of meetings to support the service development and support function. Includes: <ul style="list-style-type: none"> <li>• agenda</li> <li>• notices of meeting</li> <li>• draft minutes.</li> </ul>	Destroy 3 years after action completed
17985	Copies of minutes and other meetings documents.	Destroy 2 years after action completed

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Performance Reporting

The activities associated with reporting to government agencies and businesses about the services provided on their behalf. Includes routine reports on services delivered by client type, location and in relation to type of payment.

*For reports relating to the longer terms goals and objectives of the organisation, use AFDA STRATEGIC MANAGEMENT – Reporting.*

*For reports to government, such as annual reports, use AFDA GOVERNMENT RELATIONS - Reporting.*

Entry	Description of records	Disposal action
17986	Records documenting the collection of performance statistics. Includes: <ul style="list-style-type: none"> <li>• measurement methods</li> <li>• measurement statistics.</li> </ul>	Destroy 7 years after action completed
17987	Records documenting the preparation and finalisation of reports relating to service provision. Includes final versions of reports.	Destroy 7 years after action completed
17988	Records documenting decisions to update performance measurement collection.	Destroy 1 year after decision superseded
17989	Copies of reports and related documents.	Destroy 1 year after action completed

### Planning

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

Entry	Description of records	Disposal action
17990	Final version of business plans for service provision.	Destroy 3 years after plan is superseded
17991	Working papers used to develop plans. Includes draft plans, reports analysing issues, feedback and comments.	Destroy 1 year after plan is superseded



## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Policy

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

Entry	Description of records	Disposal action
17992	Records documenting the development and establishment of agency and office operational service delivery policy. Includes policy proposals, research papers, results of consultations, supporting reports and major drafts.	Destroy 5 years after policy is superseded
17993	Working papers supporting the development of agency and operational service delivery policy. Includes input and comments from other areas of the agency.	Destroy 3 years after promulgation of the new policy
17994	Copies of policy documents and supporting papers relating to the service development and support function.	Destroy 1 year after policy is superseded

### Procedures

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

Entry	Description of records	Disposal action
17995	Master set of manuals, handbooks, directives, etc detailing procedures relating to the service development and support function.	Destroy 5 years after procedures are superseded
17996	Records documenting the development of procedures supporting the service development and support function.	Destroy 1 year after action completed
17997	Copies of manuals, handbooks, directives, etc.	Destroy 1 year after procedures are superseded

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

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For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Research

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

*For customer service related research, use SERVICE DEVELOPMENT AND SUPPORT - Service Review and Improvement.*

Entry	Description of records	Disposal action
17998	Records documenting research carried out to support the service development and support function, including research into new service initiatives and trends in service provision.	Destroy 7 years after action is completed
17999	Copies of research documents used in support of the service development and support function.	Destroy 2 years after last action

### Service Review and Improvement

The activities associated with the application of quality assurance procedures that facilitate continuous improvement in service delivery. Includes service evaluation, peer reviews, benchmarking and service feedback.

*For research other than that related to customer service, use SERVICE DEVELOPMENT AND SUPPORT – Research.*

*For updates to procedures and guidelines resulting from the review process, use SERVICE DEVELOPMENT AND SUPPORT - Procedures.*

*For certification and accreditation, use SERVICE DEVELOPMENT AND SUPPORT - Accreditation.*

*For client complaints and appeals against service decisions, use, SERVICE DEVELOPMENT AND SUPPORT - Complaints Management.*

Entry	Description of records	Disposal action
18000	Records documenting the collection of information on which service reviews are based to ensure quality of service provision. Includes: <ul style="list-style-type: none"> <li>• research of best practice and benchmarking</li> <li>• service feedback</li> <li>• peer reviews.</li> </ul>	Destroy 5 years after all action completed
18001	Records documenting decisions to update procedures and guidelines.	Destroy 5 year after completion of new guidelines and procedures

## SERVICE DEVELOPMENT AND SUPPORT

The function of establishing and implementing processes that support service delivery to payers and clients. Includes service accreditation, standards, acquisition of service providers, quality assurance and improvement, community liaison, identification and development of new markets and related services and liaison with service payers such as government agencies and private businesses.

For the provision of vocational rehabilitation and disability and injury management services to referred clients, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.

For the provision of disability management and injury prevention and management services for external government agencies and/or private businesses as part of a single or one-off service, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Targeted Services.

### Tendering

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

*For contracts and agreements resulting from the tendering processes, use SERVICE DEVELOPMENT AND SUPPORT - Agreements.*

Entry	Description of records	Disposal action
18002	Records documenting the development and issue of tender documentation. Includes Statement of Requirements, Request for Proposals, Expression of Interest, Request for Tender (RFT) and draft contract.	Destroy 7 years after tender process completed
18003	Evaluation of tenders received against selection criteria. Includes records documenting arrangements for carrying out the evaluation process, evaluation report, recommendations, final report and public notices.	Destroy 7 years after tender process completed
18004	Records documenting post-offer negotiations and due diligence checks.	Destroy 7 years after tender process completed
18006	Records of unsuccessful tenders or a tender process where there is no suitable bidder, or where the tender process has been discontinued. Includes submissions, notification of outcome and reports on debriefing sessions.	Destroy 2 years after tender process completed or decision made not to continue with the tender
18007	Tender register.	Destroy 7 years after last entry

## VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT

The function of delivering services to people with a disability, injury or health condition, to manage their condition and utilise their abilities so as to obtain or keep work and enhance their personal skills and ability to participate in community life. Includes delivery of services such as vocational and occupational rehabilitation, disability management, injury prevention and management and assessments relating to job capacity, independent living and wage levels.

### Program Provision

The activities associated with providing the client with a planned rehabilitation and/or disability management program. Includes client assessment, development and delivery of service program, liaison with and management of client support delivered by external service providers such as allied health professionals and registered training organisations. Also includes program monitoring, program support, program evaluation and program review.

*For vocational rehabilitation, disability and injury management services for government agencies and/or private businesses use, VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT- Targeted Services.*

*For activities relating to the management of privacy principles and data protection, use AFDA INFORMATION MANAGEMENT - Privacy.*

Entry	Description of records	Disposal action
17959	Name identified records documenting a client's rehabilitation and/or disability management. Includes: <ul style="list-style-type: none"> <li>• referrals, including successful agency disputed non-referral documentation</li> <li>• assessments</li> <li>• rehabilitation and/or disability management plans and programs</li> <li>• activity agreements</li> <li>• services provided</li> <li>• evidence for claimed milestones eg wage slips</li> <li>• communication relating to service provision</li> <li>• program reviews</li> <li>• program exit reports</li> <li>• program closure documentation.</li> </ul>	Destroy 7 years after last action

### Referral Management

The activities associated with the receipt and processing of referrals. Includes agency processes to dispute a job capacity assessment and non-referral for vocational rehabilitation services.

*Tip!: This activity only covers the assessment of the referral documentation and subsequent related documentation.*

*For the delivery of vocational rehabilitation services to a client, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.*

Entry	Description of records	Disposal action
17955	Final versions of referral determinations that result in a program, including interview report.	Destroy 7 years after service delivery has been completed

## VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT

The function of delivering services to people with a disability, injury or health condition, to manage their condition and utilise their abilities so as to obtain or keep work and enhance their personal skills and ability to participate in community life. Includes delivery of services such as vocational and occupational rehabilitation, disability management, injury prevention and management and assessments relating to job capacity, independent living and wage levels.

### Referral Management - Continued

Entry	Description of records	Disposal action
17956	Records documenting client participation failures.	Destroy 2 years after date of determination
17957	Records documenting agency disputed non-referrals that do not result in a program.	Destroy 2 years after date of last action

### Targeted Services

The activities involved in delivering vocational rehabilitation and disability management consultancy services for external government agencies and/or private businesses. Includes single or one-off service provision.

*For the provision of vocational rehabilitation and disability management services to a referred client, use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program Provision.*

*For consultancy contracts, use SERVICE DEVELOPMENT AND SUPPORT- Agreements*

*For the tendering processes and the consultancies where the tender/expression of interest was unsuccessful, use SERVICE DEVELOPMENT AND SUPPORT - Tendering.*

*Tip! Use VOCATIONAL REHABILITATION, DISABILITY AND INJURY MANAGEMENT - Program provision, for all program elements.*

Entry	Description of records	Disposal action
17958	Records documenting targeted service delivery to external organisations, groups and individuals. Includes records documenting: <ul style="list-style-type: none"> <li>• the development and provision of services and products</li> <li>• assessments and progress reports</li> <li>• working papers.</li> </ul>	Destroy 7 years after all terms and conditions of the targeted services agreement have been completed