

FILE MANAGEMENT

PURPOSE:

To ensure that all documentation relating to the operation of Breakaway Toowoomba Inc is appropriately filed, then archived and safely disposed of after the correct period of time.

SCOPE:

- Archival method
- Length of time that various categories of documents must be retained

POLICY:

- Breakaway Toowoomba Inc acknowledges the need to store all necessary documentation appropriately and securely for the specified time

PROCEDURE:

1. Archiving Documents

Archived files are stored in the archive storeroom. All archives are to be sorted as follows:

- Client Records
- Staff Records
- Administrative and Financial Records
- Policy and Procedures

All archived information is entered on the archives index that is maintained by the Administrative support Officer. The index records, the file contents, the archive box number and the file number.

The Administrative Support Officer is responsible for organising archived information and for keeping the archive storeroom locked at all times.

2. Retention Period

Archived information is securely destroyed after the following time periods:

- Employment applications - unsuccessful (six months)
- Staff records - seven years after the staff person ceases employment
- Client records - seven years after client ceases receiving services
- Financial records - seven years
- General administrative records - two years
- Policy and procedures - one year

Approved (Facilitators) *David Bell* Date *23.06.08*

Approved (Chairperson) *Paul Horne* Date *23.06.08*