

Functional Retention and Disposal Authority

Tertiary education and research

Authority number: FA462

Dates of coverage: Open

List of Functions and Activities covered

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1.0.0 TERTIARY EDUCATION

The provision of tertiary education (formal education beyond high school). This includes:

- higher education provided by universities that leads to a degree and/or post-graduate qualifications (AQF levels 5 to 10).
- vocational education and training by TAFEs and Registered Training Organisations that leads to qualifications such as Certificate I, Certificate II, Certificate III and Certificate IV (AQF levels 1 to 4).

See Functional Retention and Disposal Authority *Cultural, recreational and sporting institutions* for records relating to the management of collections of items or objects for cultural, heritage, scientific or other research purposes

See Functional Retention and Disposal Authority *Cultural, recreational and sporting institutions* for records relating to the management of venues, facilities, sites and grounds for sporting, recreational and cultural use. Includes sports stadiums and centres, galleries, museums, showgrounds, parklands, parks and gardens and entertainment and performing arts centres.

See Functional Retention and Disposal Authority *Cultural, recreational and sporting institutions* for records relating to the management of or staging of community events and programs. Includes exhibitions, arts productions and performances, sporting, recreational and cultural events, education and outreach programs, membership programs.

See Functional Retention and Disposal Authority *Cultural, recreational and sporting institutions* **COLLECTIONS MANAGEMENT - Access and use** for records relating to library services including the issue of readers tickets, access to the collection and loans.

See Functional Retention and Disposal Authority *Primary and secondary education* for records relating to the management of secondary students attending the institution.

See Functional Retention and Disposal Authority *provision of childcare services*. 1.1.0 for records relating to provision of childcare services.

See General Retention and Disposal Authority *Administrative records* **GOVERNING AND CORPORATE BODIES - Compliance** for records relating to the establishment of the institution and its companies and controlled entities.

See General Retention and Disposal Authority *Administrative records* **GOVERNING AND CORPORATE BODIES - Membership** for records relating to membership of governing bodies, committees and student bodies that are by appointment rather than election.

See General Retention and Disposal Authority *Administrative records* **GOVERNMENT RELATIONS - Reporting** for annual reports of companies or controlled entities.

See General Retention and Disposal Authority *Administrative records* **STRATEGIC MANAGEMENT - Policy and Procedures** for records relating to the development and review of core and administrative policies and procedures.

See General Retention and Disposal Authority *Administrative records* **STRATEGIC MANAGEMENT - Legislation** for records relating to the development and review of university by laws.

See General Retention and Disposal Authority *Public health services patient records* **COMMUNITY BASED HEALTH CARE 1.2.0** for records relating to the provision of medical services to students, staff and clients.

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TERTIARY EDUCATION - Alumni relations

1.1.0 Alumni relations

See **Student awards, fellowships, prizes and scholarships** for records of awards provided to alumni.

See General Retention and Disposal Authority *Administrative records* **COMMUNITY RELATIONS** for records relating to donations, fundraising campaigns, and public lectures which are outside of the teaching curriculum.

1.1.1	Records relating to the management of alumni associations. Includes the management of membership details, events, activities.	Retain until administrative or reference use ceases, then destroy
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TERTIARY EDUCATION - Commercial activities

1.2.0 Commercial activities

See General Retention and Disposal Authority *Administrative records* **CONTRACTING-OUT & COMMERCIAL SERVICES** for records relating to the commercialisation of services and products and the provision of services on a commercial basis.

See General Retention and Disposal Authority *Administrative records* **GOVERNING & CORPORATE BODIES** for records relating to the establishment and incorporation of entities for commercial purposes.

See General Retention and Disposal Authority *Administrative records* **STRATEGIC MANAGEMENT - Intellectual property** for records relating to intellectual property matters.

1.2.1	The register of commercial activities undertaken by universities. Includes a description of the activity, details of all parties, details of any appointment to a governing body, details of meetings.	Retain minimum of 7 years after superseded, then destroy
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TERTIARY EDUCATION - Course accreditation

1.3.0 Course accreditation

The process of accreditation and approval of courses, subjects and units, both internally by the institution and by relevant external professional and regulatory bodies.

1.3.1	Final versions of accredited or approved courses for AQF levels 5 to 10. Includes content and outcomes, calendars, faculty handbooks and course guides.	Required as State archives
1.3.2	Final versions of accredited or approved courses for AQF levels 1 to 4. Includes content and outcomes, calendars, faculty handbooks and course guides.	Retain minimum of 30 years after course no longer offered, then destroy
1.3.3	Records relating to the development of accredited or approved courses for AQF levels 1 to 10. Includes correspondence, reference/advisory/industry groups, records of working parties and notes, and committee records.	Retain minimum of 10 years after action completed, then destroy
1.3.4	Records relating to successful or unsuccessful accreditation or approval of courses, programs, training packages, modules and units for short or non-award courses.	Retain minimum of 10 years after expiry of accreditation or approval or minimum of 10 years after action completed, whichever is longer, then destroy
1.3.5	Records generated to support compliance with registration and accreditation obligations. Includes: • samples of output and results • reports and portfolios created for accreditation body.	Retain minimum of 7 years after action completed, then destroy

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TERTIARY EDUCATION - Course delivery

1.4.0 Course delivery

The means by which teaching is conducted including online, face to face, and via learning management systems.

See **Student assessment** for student scripts.

1.4.1	Records relating to course delivery, including subject resources, material used in course delivery, and quality assurance. Includes: • subject outlines • study guides • readings • self-assessment exercises • audio/visual teaching aides • reading and assignment lists • lecture notes • timetables, rosters, organising venues, teaching allocations • feedback and assessment of data collection/survey forms on course delivery • assessment templates, test and exam papers, question pools • proof of ability to take part in subject related activities that require certification, e.g. first aid, scuba diving, snorkelling, building construction, animal handling • decisions on waivers/exclusions from the requirements for subject related activities, e.g. for vaccination. Note: Where the records become part of another record, such as an investigation into misconduct or an accident during an activity, dispose of in accordance with requirements for those records.	Retain until no longer required for teaching or other purposes, then destroy
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TERTIARY EDUCATION - Course transfers

1.5.0 Course transfers

Transfer of courses or units of study to another institution.

1.5.1	Records relating to the transfer of responsibilities and ownership of courses to another institution. Includes agreements.	Retain minimum of 7 years after action completed or finalisation or termination of associated agreements, then destroy
1.5.2	Records relating to courses, assets, services and administration functions, where responsibility and/or liability has been transferred to another organisation within the NSW public sector and where records are required to continue teaching, research, provision of services or management of business or activity. Includes but is not limited to: • assets • student administration • student and other services • teaching • research • general administration, and • commercial activities and consultancy services.	Transfer to new institution

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TERTIARY EDUCATION - Elections

1.6.0 Elections

The management of elections. Includes elections for student bodies where such elections are managed by the institution.

1.6.1	Records relating to the conduct of elections for membership of governing or student bodies, and committees. Includes management of electoral rolls, advertising, balloting, nominations, notices, papers, results, scrutineers, tally sheets.	Retain minimum of 1 year after action completed, then destroy
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TERTIARY EDUCATION - Registration of education providers

1.7.0 Registration of education providers

Activities relating to the establishment of the institution as an education provider, and the development, submission and outcomes of an institution's application to become, or continue to be, an approved registered education or training provider by a State or Australian regulatory authority. Includes the Tertiary Education Standards Quality Agency (TESQA), the Australian Skills Quality Authority (ASQA), and the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS).

See **Course accreditation** for records relating to accreditation of courses.

See General Retention and Disposal Authority *Administrative records* **FINANCIAL MANAGEMENT - Accounting** for records relating to the management of payments to registration bodies.

See General Retention and Disposal Authority *Administrative records* **GOVERNMENT RELATIONS - Submissions** for legacy records relating to submissions to the Minister for establishment or accreditation of the institution.

See General Retention and Disposal Authority *Administrative records* **STRATEGIC MANAGEMENT - Compliance** for records relating to accreditation of facilities, e.g., anatomy labs.

1.7.1	Final submission to the regulator to become or continue to be a registered education provider or registered training organisation. Includes records of approval by the authority (TESQA, ASQA and Education Services for Overseas Students (ESOS)).	Retain minimum of 30 years after registration ceases or is refused, then destroy
1.7.2	Records created during the development of a submission by the institution to either become or continue to be an Education Provider/RTO. Includes CRICOS, TESQA, ASQA and ESOS.	Retain minimum of 15 years after action completed, then destroy

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TERTIARY EDUCATION - Student admission, enrolment, progression and recruitment

1.8.0 Student admission, enrolment, progression and recruitment

The process of applying for, enrolling and progressing through a course or subject.

Includes students enrolled in a course of study with a higher education provider, students enrolled in a vocational education and training course, and learners completing short courses.

Includes undergraduate and postgraduate courses, short courses, bridging courses/programs, and non-award applications.

See **Student awards, fellowships, prizes and scholarships** for records relating to the conferral of honorary awards.

See General Retention and Disposal Authority *Administrative records* **COMMITTEES** for records relating to committees responsible for assessing student progression cases.

See General Retention and Disposal Authority *Administrative records* **FINANCIAL MANAGEMENT - Accounting** for records relating to the payment of fees

1.8.1	Records relating to successful applications for admission, enrolment and subsequent progress of students, including students enrolled for a course of study and learners enrolled in short courses. For learners the records would include applications and approvals. Includes: • applications and supporting documents. Includes any formal pre-application EOI lodgement process (e.g. for HDR or Honors places) • offers of places • interview records and entry examinations • correspondence/specific information provided to students that supports decisions on their progression and enrolment/study plans (e.g. advice on developing study plans for students) • show cause for progression purposes • special considerations affecting enrolment and progression • health and safety clearances required to participate in courses, e.g. hearing checks, health statements • variations of program, advanced standing, or withdrawals • confirmation that a criminal history check has been completed and a working with children check has been sighted where these are required to enrol • applications for student exchange and study abroad (in and out bound).	Retain minimum of 7 years after completion or discontinuation of course or program of study by student, then destroy
1.8.2	Records relating to unsuccessful, lapsed, rejected, incomplete or withdrawn applications for admission. Includes:	Retain until appeal period has expired or minimum of 1 year after action

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<i>TERTIARY EDUCATION - Student admission, enrolment, progression and recruitment</i>		
	• application forms and supporting documents • offers of places • interview records • entry examinations • correspondence • applications for student exchange and study abroad (in and out bound) • records of any formal pre-application EOI lodgement processes preceding application (e.g. HDR or Honors places) if a subsequent application is unsuccessful, lapsed, rejected, incomplete or withdrawn.	completed, whichever is longer, then destroy
1.8.3	Documents presented or received as part of criminal history and/or working with children checks. Note: a record that the check has been sighted should be created and retained as per the relevant class.	Retain until check completed and then destroy or return to applicant
1.8.4	Records (and copies of records) used to verify the identity of an applicant or individual enrolling. Examples include: • primary documents such as birth certificate, passport or citizenship certificate • secondary documents such as driver licence or permit, Medicare card, Veteran or concession card • other documents such as marriage certificate, bank or taxation statement, council rate notice, water utility bill or land title record. Note: a record that the check has been sighted should be created and retained as per the relevant class.	Retain original until verification and validation process is complete, then return to owner. Retain copy until verification and validation process is complete
1.8.5	Records relating to: • pre-application or prospective student recruitment where the student does not apply, e.g. marketing, correspondence • provision of student identification including library borrowing rights and management of student concessions • administrative arrangements for the management of enrolment processes • notifications for change of address or contact details • requests for academic transcripts and verification of qualifications or graduation status.	Retain until administrative or reference use ceases, then destroy

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TERTIARY EDUCATION - Student assessment

1.9.0 Student assessment

The process of testing knowledge and understanding of candidates by examination and other techniques and managing student attendance. Includes assessment items completed and submitted by students.

See **Student misconduct** for records relating to academic misconduct, such as plagiarism.

See **Student results** for records documenting results and final grades, etc., and appeals to final grades and final subject/unit results.

See **Student support services** for records relating to the provision of special needs during examinations or other assessment activities.

See General Retention and Disposal Authority *Administrative records* **OCCUPATIONAL HEALTH & SAFETY - Risk management** for records relating to risk management and exposure to high risk environments, including radiation.

1.9.1	Records relating to the assessment of courses of study such as practicums and/or professional placements where the number of hours completed and proof of satisfactory performance may be required for accreditation purposes (e.g. nursing and teaching practicums). Note: For certification/accreditation purposes the information required will usually include the number of hours/days completed, dates, locations worked and the result/grade.	Retain minimum of 60 years after completion of course of study, then destroy
1.9.2	Assessment committee records and records of appeals of individual assessments. Note: action completed may include escalation to internal or external formal grievance/complaint processes.	Retain minimum of 2 years after action completed, then destroy
1.9.3	Student examination/assessment scripts or works submitted or completed for the purposes of assessment or evaluation including: • examinations (written or oral) • essays • assignments • field work reports • presentations • works of art.	If not returned to student, retain until end of the appeal period, then destroy
1.9.4	Student examination/assessment scripts or items where the assessments are audited by an external body, e.g. SafeWork NSW requirements for TAFE.	Retain until end of the audit period, then destroy
1.9.5	Records relating to administrative arrangements for practicums and the conduct of examinations and other assessment activities, including supervision, timetabling, eligibility, provision of materials and objections to taking	Retain until end of appeal period, then destroy

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TERTIARY EDUCATION - Student assessment

	part in an assessment/examination, liaison with placement providers for practicums.	
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TERTIARY EDUCATION - Student attendance

1.10.0 Student attendance

See **Student assessment** for attendance of students at practicums and/or professional placements where the number of hours completed and proof of satisfactory performance may be required for accreditation purposes

1.10.1	Records relating to the management of student attendance for teaching and assessment activities such as examinations, placements, practicums, assessment activities, classes, and tutorials.	Retain until end of appeal period, then destroy
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TERTIARY EDUCATION - Student awards, fellowships, prizes and scholarships

1.11.0 Student awards, fellowships, prizes and scholarships

See **Student results** for records relating to the conferral of honorary awards.

See **Student support services** for records relating to the management of scholarships for students.

See General Retention and Disposal Authority *Administrative records* **COMMUNITY RELATIONS - Donations, sponsorships and fundraising** for scholarships/prizes governed by donations.

1.11.1	Records relating to the establishment and conditions of student awards, fellowships, prizes and scholarships.	Retain minimum of 10 years after action completed, until fellowship is discontinued or until terms have been fulfilled, whichever is longer, then destroy
1.11.2	Records relating to the management and delivery of student awards, fellowships, prizes and scholarships. Includes successful applications, nominations, decision and acceptances.	Retain minimum of 7 years after action completed, then destroy
1.11.3	Records relating to applications or nominations for student awards, fellowships, prizes and scholarships that are unsuccessful, rejected or lapse.	Retain minimum of 1 year after action completed or appeal period has expired, then destroy

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TERTIARY EDUCATION - Student graduation

1.12.0 Student graduation

See General Retention and Disposal Authority *Administrative records* **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to graduation ceremonies

1.12.1	Records relating to determination of eligibility to graduate. Includes supporting documentation for variation of student details for graduation and uncollected testamurs.	Retain until administrative or reference use ceases, then destroy
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TERTIARY EDUCATION - Student grievances and complaints

1.13.0 Student grievances and complaints

The management of student grievances and complaints from students.

See **Research** for records relating to research misconduct and complaints.

See General Retention and Disposal Authority *Administrative records* **INFORMATION MANAGEMENT - Cases** for records relating to privacy complaints

See General Retention and Disposal Authority *Administrative records* **PERSONNEL** for records relating to staff grievances or where a student grievance results in disciplinary action being taken in relation to a staff member.

1.13.1	Records relating to the management of grievances or complaints raised by a student, for example: • discrimination • work/study environment • assessment/assignment organisation or distribution • peers, lecturers, tutors or supervisors • access to equipment, facilities (such as laboratories), tutorials, or other services Includes inquiries and investigations, outcomes, and matters referred to external bodies for investigation.	Retain minimum of 7 years after date of decision, then destroy
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TERTIARY EDUCATION - Student misconduct

1.14.0 Student misconduct

The management of student misconduct (general and academic).

See **Research** for records relating to research misconduct and complaints.

See General Retention and Disposal Authority *Administrative records* **PERSONNEL - Misconduct** for records relating to staff as a respondent to gender-based violence declaration.

1.14.1	Summary reports on the outcome of an investigation into student misconduct where the student is permanently excluded.	Retain minimum of 75 years after action completed, then destroy
1.14.2	Records relating to the management of proven and unproven cases involving allegations of abuse or neglect of children or gender-based violence. Includes inquiries and investigations, outcomes, and matters referred to external bodies for investigation.	Retain minimum of 45 years after action completed, then destroy
1.14.3	Records relating to formal investigations into student misconduct. Includes cases that are proven or dismissed. Includes records of the investigation undertaken and outcome.	Retain minimum of 7 years after action completed, or completion or discontinuation of course or program of study by student, then destroy
1.14.4	Records relating to preliminary/fact finding investigations that are not formally proceeded with (i.e. the allegations have been found to be unsubstantiated, false, vexatious or misconceived or could not be proven) and the accusation has not involved a child or a young person.	Retain minimum of 1 year after action completed, then destroy

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TERTIARY EDUCATION - Student results

1.15.0 Student results

The assessment of students' knowledge and skills.

See **Student admission, enrolment, progression and recruitment** for enrolment and progression records for formal special considerations.

See **Student assessment** for assessment items completed and submitted by students (e.g. examination papers, assignments, practicum reports, etc.)

See **Student grievances and complaints** for records relating to changes to assessment as a result of grievance lodged by student.

See **Student misconduct** for records relating to changes to assessment as a result of misconduct.

See General Retention and Disposal Authority *Administrative records* **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to arranging for venue, speakers, catering, seating, special access, etc., for graduation ceremonies.

1.15.1	Summary record confirming details of all students who are awarded a qualification at AQF Levels 5-10. Includes honorary doctorates and prizes awarded.	Required as State archives
1.15.2	Final results obtained by students who participate in and/or are awarded a qualification at AQF Levels 5-10 where the results are generated as an outcome of some form of assessment.	Retain minimum of 75 years after action completed, then destroy
1.15.3	Summary record confirming details of all students who participate in a qualification at AQF Levels 1-4 (i.e. Certificates I, II, III and IV) or an externally accredited course such as those delivered by a Registered Training Organisation. Includes final results.	Retain minimum of 30 years after action completed, then destroy
1.15.4	Summary records confirming details of students who have completed a non-award course, including short courses where completion provides credit to a more formal award course (e.g. some micro credentials). Includes final results. Note: longer retention may be required until any credit for an award course expires if applicable.	Retain minimum of 7 years after action completed, then destroy
1.15.5	Records relating to final subject/unit results that have been changed as a result of moderation, remarking or appeal by the student. See 1.15.6 or 1.15.7 for appeals that do not result in changes in marking.	Retain minimum of 7 years after action completed or minimum of 7 years after expiry of appeal processes and appeal rights, whichever is longer, then destroy
1.15.6	Records relating to the grading/marking of individual assessment components of a subject at AQF Levels 5-10	Retain minimum of 1 year after action completed or minimum of 1 year

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<i>TERTIARY EDUCATION - Student results</i>		
	and determination of final results/grades in a course. Includes unit tests, local exams and quizzes. Records include: • examiners/assessor's reports and related records for higher degree students • appeals of grades • local faculty level informal requests for extension of assessment components for a subject • local special consideration arrangements. Note: see entry above for results that have been changed as a result of moderation, remarking or appeal by the student.	after end of appeal, whichever is longer, then destroy
1.15.7	Records relating to the grading/marking of individual assessment components of a subject or course at AQF Levels 1-4 and determination of final results/grades.	Retain minimum of 1 year after audit period, then destroy

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TERTIARY EDUCATION - Student support services

1.16.0 Student support services

The provision of support services to students (e.g. accommodation, financial assistance, scholarships, careers advice).

Note: This section applies to records of services where the service is provided directly by the institution, or where, for other reasons (such as contractual agreements), the institution has a right to control of the records. This does not extend to records created by external bodies, such as student bodies (e.g. students' union) or residential colleges where the college is not managed or operated by the institution.

See **Student admission, enrolment, progression and recruitment** for records relating to advice provided to students in relation to teaching, enrolment, progression, assessments etc

See **Student misconduct** for records relating to misconduct of students in university provided accommodation.

See General Retention and Disposal Authority *Administrative records* **COMMUNITY RELATIONS - Liaison** for records relating to interaction with students' associations.

See General Retention and Disposal Authority *Administrative records* **CONTRACTING-OUT** for records relating to agreements to provide services.

See General Retention and Disposal Authority *Administrative records* **FINANCIAL MANAGEMENT - Accounting** for records relating to financial transactions, including revenue, expenditure, debt recovery.

See General Retention and Disposal Authority *Administrative records* **PROPERTY MANAGEMENT - Leasing-out** for records relating to lease agreements with students.

1.16.1	Records relating to the establishment, negotiation, maintenance and review of agreements to provide and operate services to students. Records include: - correspondence and records of negotiations - final, approved versions and significant drafts of agreements - reviews of agreements.	Retain minimum of 7 years after expiry or termination of agreement, then destroy
1.16.2	Records relating to the provision of - financial assistance services (e.g. loans, bursaries) - special needs and accessibility services (e.g. interpreters, reading assistance for sight impaired students, disabled access) - welfare and wellbeing support services, including case management for assaults, deaths. See 1.8.4 for identity verification documents that can be sighted and not retained.	Retain minimum of 7 years after action completed or (where applicable) final repayment of loan, then destroy
1.16.3	Records relating to unsuccessful, withdrawn or lapsed applications for student support services.	Retain minimum of 1 year after action completed, then destroy

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TERTIARY EDUCATION - Student support services

1.16.4	Records relating to the provision and administration of: • residential accommodation and placement services for students • careers, employment and general services • mentoring and peer networking services.	Retain minimum of 2 years after action completed, then destroy
1.16.5	Records relating to the provision of counselling by a professional counsellor. Includes case files. Note: Case files may be destroyed prior to the expiry of the minimum retention period in certain circumstances e.g. agreement between counsellor and client.	Retain minimum of 7 years after action completed or until the person reaches the age of 25, whichever is longer, then destroy