
GOV – Filing and Records Management

All Headway Gippsland records will be filed and managed systematically so that:

- material related to the governance and administration of Headway Gippsland is clearly identified and retained for the required periods of time. Material held by Board Executive Assistant
- material of on-going relevance to Headway Gippsland's activities or of potential historical significance is identified and archived accordingly. Material held by Board Executive Assistant
- material related to clients and Employees are securely stored, reviewed, archived and disposed of according to the organisation's procedures for client records
- regular reviews remove and dispose of material that is no longer required
- disposal methods protect the privacy of individuals and the confidentiality of Headway Gippsland business.

As, Headway Gippsland is required to retain its financial, taxation and other statutory records for a minimum of 7 years. Documents are kept Drouin Office

Procedures

Records management

Headway Gippsland records whether hard copy or electronic consist of the following centrally located sets of material:

- Financial records: These are kept in our Drouin office managed by the finance staff. Access is restricted to Finance department, CEO and EA
- Personnel records: These are kept electronically and managed by the Operations Manager Access is restricted to Executive staff
- Membership records: These are kept Drouin and managed by the Finance dept Access is restricted to Executive staff and the finance department
- Statutory documents related to the incorporation and governance of Headway Gippsland: These are kept at the Drouin office and managed by the Board Executive assistant Access is restricted to Board, Board Executive Assistant and CEO
- Contractual and other administrative documents, including insurance policies can be found in our Q MS and managed by the Board Executive Assistant

Retention and archiving

HR are responsible for making sure we have all relevant up-to-date documentation from employees, The Finance Team is responsible for reviewing the central files and:

- archiving all financial records (including employee related records) for a minimum of 7 years and disposing of older records
- archiving other records according to the requirements for retention and disposing of older records
- disposing of any material no longer required.

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Disposal of Files

All confidential documents are to be shredded on disposal. This includes:

- Board/Management Committee papers and minutes
- financial information and records
- all personnel records including job applications, supervision or performance management records
- workplace grievance records
- membership records
- client records
- any other material with sensitive or personal information.

General material that is not considered sensitive should be disposed of via the paper recycling Headway Gippsland use an external company called the Docshop.

Headway Gippsland also use the service of an external shredding company to destroy any confidential information

Managing correspondence

Correspondence forms part of Headway Gippsland's records, and Board Executive Assistant will be responsible for managing the filing of hard copy and email correspondence, and ensuring the inclusion of email correspondence on the daily back up of electronic data.

All staff will be responsible for managing their personal correspondence and ensuring copies of any correspondence that requires central filing are sent to the Board Executive Assistant for filing.