



Responsible Public Authority: SunWater

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Scope of Disposal Schedule

This Schedule applies to core business records of SunWater, relating to the functions of managing water infrastructure development, operation and maintenance, including water management. Also includes the management of SunWater's Board of Directors, customer relations and corporate governance.

This Schedule is to be used in conjunction with the *General Retention and Disposal Schedule for Administrative Records (GRDS)*.

Authority

Authorisation for the disposal of public records is given under, and subject to, the provisions of s.13 of the *Public Records Act 2002* (the Act). Public records must not be disposed of if disposal would amount to a contravention of s.13.

Revocation of previously issued disposal authorities

Any previously issued disposal authority which applied to disposal classes described in this schedule is revoked. SunWater should



take measures to withdraw revoked disposal authorities from circulation. This includes, but is not limited to:

- QDAN 106 Version 1 Issued to State Water Projects – 28 February 1997
- QDAN 563 Version 1 Issued to SunWater – 14 March 2002

Disposal

All of the retention periods in this approved schedule are the minimum period the sentenced records must be maintained for.

Additionally, any class may be required to be retained longer if subject to the following requirements:

- (i) for any civil or criminal court action which involves or may involve the State of Queensland or an agency of the State; or
- (ii) because the public records may be obtained by a party to litigation under the relevant Rules of Court, whether or not the State is a party to that litigation; or
- (iii) pursuant to the *Evidence Act 1977*; or
- (iv) for any other purpose required by law.

This list is not exhaustive.

Documents which deal with the financial, legal or proprietary rights of the State of Queensland or a State related Body or Agency viz-a-viz another legal entity and any document which relates to the financial, legal or proprietary rights of a party other than the State are potentially within the category of public records to which particular care should be given prior to disposal.

Records which are subject to a freedom of information application are to be retained for a period greater than the time specified to ensure that all avenues for appeals for review under the legislation are exhausted, even though the records may be due for destruction according to this Schedule at the time of the application (see *General Retention and Disposal Schedule for Administrative Records*).

Permanent Records

Records of permanent status may be transferred to Queensland State Archives with the approval of the State Archivist. Agencies are required to submit a transfer proposal containing details of the records under consideration for transfer. Queensland State Archives will assess the transfer proposal before formal approval to transfer is issued. The State Archivist reserves the right to



revise any previous decisions made with regard to the appraisal and transfer of records. Contact Agency Services at Queensland State Archives on 07 3131 7777 for further details.

Revision History

QDAN	Date of Approval	Extent of revision
QDAN106 v.1	28 February 1997	Issued to State Water Projects
QDAN563 v.1	14 March 2002	First release (partial Schedule)
QDAN650 v.1	15 June 2009	Major review



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1. BOARD MANAGEMENT

The function of managing the SunWater Board and its subcommittees responsible for directing and controlling the affairs of the corporation and providing advice to the shareholding Ministers and Chief Executive.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Directors Interests*
- *Insurance*
- *Meetings*
- *Planning*
- *Procurement*
- *Separations*
- *Travel Management*



Reference	Description of records	Status	Disposal Action
1.1	ADVICE <i>The activity of providing or receiving formal opinions about particular matters.</i>		
1.1.1	Ministerial Directions – Significant Records relating to directions received from SunWater’s shareholding Ministers in accordance with the <i>Government Owned Corporations Act 1993</i> which have a significant impact on the strategic direction of the corporation. <i>See the General Retention and Disposal Schedule for Administrative Records for other records relating to routine liaison between SunWater and shareholding Ministers including ministerial correspondence, and submissions made to the Minister about significant functional issues.</i>	Permanent	Retain permanently.
1.1.2	Routine Operational Matters Records relating to advice received or provided by the SunWater Board concerning routine operational matters. <i>See the General Retention and Disposal Schedule for Administrative Records for records relating to Crown Law and legal advice.</i>	Temporary	Retain for 7 years after last action.
1.2	APPOINTMENTS <i>The activity of appointing members to the SunWater Board of Directors.</i>		



Reference	Description of records	Status	Disposal Action
1.2.1	<p>Records relating to the nomination and appointment of members to the SunWater Board of Directors. .</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• nominations;• instruments of appointment;• terms and conditions of appointment;• letters of appointment;• schedule of appointments;• Board Register;• Customer Council Elections; and• gazettal notices. <p><i>See the General Retention and Disposal Schedule for Administrative Records for correspondence relating to the appointment of external and internal committee members.</i></p>	Temporary	Retain for 25 years after last action.
1.3	<p>BOARD REPORTING</p> <p><i>The activity of providing a formal response by the Board in response to a situation, request or legislative requirement.</i></p>		
1.3.1	<p>Quarterly Reports</p> <p>Quarterly reports on SunWater's operations given to the shareholding Ministers in accordance with the <i>Government Owned Corporations Act 1993</i>.</p>	Temporary	Retain for 7 years after last action.



Reference	Description of records	Status	Disposal Action
1.3.2	<p>Statements of Corporate Intent – Final Version</p> <p>Final version of SunWater’s Statement of Corporate Intent (SCI) in accordance with the <i>Government Owned Corporations Act 1993</i> for the financial year.</p> <p>Includes commercially sensitive matters omitted from the version reproduced in SunWater’s Annual Report in accordance with the <i>Government Owned Corporations Act 1993</i>.</p>	Permanent	Retain permanently.
1.3.3	<p>Statements of Corporate Intent – Development</p> <p>Records relating to the development of Statements of Corporate Intent.</p>	Temporary	Retain for 3 years after last action.
1.4	<p>CONTRACT MANAGEMENT</p> <p><i>The activity of establishing, maintaining, reviewing and negotiating agreements and contracts.</i></p>		
1.4.1	<p>Records relating to the administration and management of contracts under seal.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• signed under seal contracts;• contract variations;• contract conditions; and• supporting documentation (e.g. progress reports). <p>See <i>Section 2 CONTRACTING AND CONSULTING SERVICES</i> for records relating to other contracts.</p>	Temporary	Retain for 12 years after last action.
1.5	<p>COMPLIANCE</p> <p><i>The activity of adhering to external or internal standards, regulations or requirements to which SunWater is subject.</i></p>		



Reference	Description of records	Status	Disposal Action
1.5.1	Company Registration Records relating to the registration of companies (including subsidiaries) in accordance with the <i>Corporations Act 2001 (Commonwealth)</i> .	Temporary	Retain for 7 years after company registration has ceased.
1.6	DIRECTORS' FEES AND PAYMENTS <i>The activity of managing fees and payments for work performed by SunWater's Board members.</i>		
1.6.1	Records relating to managing remuneration, allowances, benefits, entitlements and fees paid to SunWater's Board members. Records may include, but are not limited to: <ul style="list-style-type: none">• remuneration rate increases;• determinations;• fee reconciliations (including salary sacrifice, salary payments, reimbursement of allowances and expenses); and• Directors' emoluments.	Temporary	Retain for 7 years after cessation of Board members' appointment.
1.7	INDUCTION <i>The activity of establishing and implementing programs intended to help a person commencing work as a SunWater Board member.</i>		
1.7.1	Records relating to the administration, implementation and management of induction training programs for SunWater Board members. Records include the Board Handbook. <i>See the General Retention and Disposal Schedule for Administrative Records for records relating to the management of internal training for SunWater employees.</i>	Temporary	Retain for 7 years after last action.



2. CONTRACTING AND CONSULTING SERVICES

The function of competing for contracts for the provision of services.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *General advice and enquiries*
- *Business Development*
- *Cost Control*
- *Interparty Arrangements*
- *Meetings*
- *Performance Management*
- *Planning*
- *Policies and procedures*
- *Procurement*
- *Risk Management*



Reference	Description of records	Status	Disposal Action
2.1	BID MANAGEMENT <i>The activity of managing bids for works or services to be undertaken by SunWater. Includes proposals for services, quotations and the management of both successful and unsuccessful bids.</i>		
2.1.1	Successful bids Records relating to successful bids for works or services to be undertaken by SunWater. Records may include, but are not limited to: <ul style="list-style-type: none">proposals;quotations;conditions of offer;conditions of supply;invitations to offer;registers;Requests for Information (RFI); andStanding Offer Arrangements (SOA).	Temporary	Retain for 7 years after finalisation of contract.
2.1.2	Unsuccessful bids Records relating to unsuccessful bids for works and services to be undertaken by SunWater.	Temporary	Retain for 2 years after last action.



3. CORPORATE AND GOVERNANCE MANAGEMENT

The function of applying broad systematic management planning and governance for SunWater. It includes the development, implementation and maintenance of management systems and compliance with International Standards for Quality Management Systems (AS/NZS ISO 9001:2000), Environmental Management Systems (AS/NZS ISO 14001:2004) and Occupational Health and Safety Management Systems (AS/NZS ISO 4801:2001).

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Advice*
- *Audit*
- *Corporate Image*
- *Enquiries*
- *Incident Management*
- *Insurance*
- *Interparty Arrangements*
- *Meetings*
- *Organisational Structuring*
- *Performance Management*
- *Planning*
- *Policies and Procedures*
- *Risk Management*
- *Submissions*



Reference	Description of records	Status	Disposal Action
3.1	<p>BUSINESS IMPROVEMENTS</p> <p><i>The activity of identifying and implementing improvements to SunWater's business processes and procedures.</i></p> <p><i>See the General Retention and Disposal Schedule for Administrative Records for other records relating to performance improvement, business development opportunities and audits.</i></p>		
3.1.1	<p>Records relating to identifying and implementing improvements to business processes and procedures in accordance with international standards for Management Systems.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• alerts;• business improvement requests;• Corrective Action Requests (CAR) and status logs;• incident non-conformance improvements; and• non-conformance reports.	Temporary	Retain for 5 years after last action.
3.2	<p>COMPLIANCE</p> <p><i>The activity of adhering to external or internal standards, regulations or requirements to which SunWater is subject.</i></p> <p><i>See the General Retention and Disposal Schedule for Administrative Records for other records relating to compliance, such as the Quality Manual and SunWater's Code of Conduct.</i></p>		



Reference	Description of records	Status	Disposal Action
3.2.1	<p>Records used by SunWater to demonstrate and support compliance with requirements as specified by international standards for Management Systems.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• compliance audit checklists;• monthly compliance checklists;• Regulatory and Environmental Committee compliance reports;• environmental legal register; and• SunWater environmental law compliance manual.	Temporary	Retain for 5 years after last action.
3.2.2	Records relating to the development of compliance documentation, including working documents.	Temporary	Retain for 3 years after last action.
3.3	LICENSING AND APPROVALS <i>The activity of seeking and granting licences and approvals required by or from SunWater to undertake requested action.</i>		



Reference	Description of records	Status	Disposal Action
3.3.1	<p><i>Environmentally relevant activities – successful registration</i></p> <p>Records relating to the successful registration of SunWater to conduct an environmentally relevant activity (ERA) in accordance with the <i>Environmental Protection Act 1994</i>.</p> <p>Includes, but is not limited to, activities relating to the operation of water treatment plants, chemical storage and dredging.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• approvals;• amendments;• audit statements;• cancellations;• decisions notices;• environmental reports;• notifications;• renewals;• suspensions; and• transfers.	Temporary	Retain for 7 years after the expiry, surrender, cancellation or transfer of the registration.



Reference	Description of records	Status	Disposal Action
3.3.2	<p><i>Environmentally relevant activities – unsuccessful registration</i></p> <p>Records relating to the unsuccessful registration of SunWater to conduct an environmentally relevant activity (ERA) in accordance with the <i>Environmental Protection Act 1994</i>.</p> <p>Includes, but is not limited to, activities relating to the proposed operation of water treatment plants, chemical storage and dredging.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• audit statements;• decision notices;• representations against a decision• environmental reports;• notifications;	Temporary	Retain for 2 years after last action.
3.3.3	<p><i>Flammable and combustible liquids</i></p> <p>Records relating to applications made by SunWater under the <i>Dangerous Goods Safety Management Regulation 2001</i> for licences to store flammable and combustible liquids.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• applications;• cancellations;• transferrals;• amendments; and• renewals.	Temporary	Retain for 4 years after the expiry, surrender, cancellation or transfer of the licence.



Reference	Description of records	Status	Disposal Action
3.3.4	<p>Explosives</p> <p>Records relating to the licensing of SunWater to possess, transport, use or store explosives in accordance with the <i>Explosives Regulation 2003</i>.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• licence applications (including site plans, emergency plans, risk assessments and Material Safety Data Sheets);• licence renewals;• approvals; and• decision notices.	Temporary	Retain for 7 years after the expiry, surrender, cancellation or transfer of the licence.
3.4	<p>MANAGEMENT REPORTING</p> <p><i>The activity of developing and promulgating management reports of overall trends and performance.</i></p> <p><i>See the General Retention and Disposal Schedule for Administrative Records for other reports, such as performance management reports and reports about core business activities, and legal deposit requirements for publications.</i></p>		



Reference	Description of records	Status	Disposal Action
3.4.1	<p><i>Trend/performance reports</i></p> <p>Records relating to management trend and performance reports, prepared in accordance with requirements under international standards for Management Systems.</p> <p>Records may include, but are not limited to :</p> <ul style="list-style-type: none"> • event shutdowns; • Interim Resource Operating Licences (IROLs) management reports; • scheme operations reports; • monthly checklists; • monthly reports; • key performance indicator (KPI) reports; • senior managers reports; and • service targets. 	Temporary	Retain for 7 years after last action.
3.5	<p>MANAGEMENT SYSTEMS</p> <p><i>The activity of developing, implementing and maintaining SunWater’s management systems.</i></p>		
3.5.1	<p><i>Development and implementation</i></p> <p>Records relating to the development and implementation of management systems to meet the requirements of international standards.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • scope; • objectives and targets; and • performance measures. 	Temporary	Retain for 7 years after last action.



Reference	Description of records	Status	Disposal Action
3.5.2	<p>Maintenance</p> <p>Records relating to the maintenance of management systems in accordance with international standards for management systems.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• document registers;• objectives and targets;• performance measures;• notifications;• system audits and reviews; and• corrective/preventative action reports.	Temporary	Retain for 7 years after last action.
3.6	<p>PLANNING</p> <p><i>The activity of formulating strategies to achieve an objective or outcome.</i></p>		
3.6.1	<p>Strategic Asset Management Plans</p> <p>Records relating to strategic asset management plans, developed in accordance with the <i>Water Supply (Safety and Reliability) Act 2008</i>.</p>	Temporary	Retain for 7 years after plan is superseded.
3.6.2	<p>System Leakage Management Plans</p> <p>Records relating to system leakage management plans, developed in accordance with the <i>Water Supply (Safety and Reliability) Act 2008</i>.</p>	Temporary	Retain for 7 years after plan is superseded.
3.7	<p>PRICE DETERMINATIONS</p> <p><i>The activity of setting prices and fees charged by SunWater.</i></p>		



Reference	Description of records	Status	Disposal Action
3.7.1	<p>Records relating to determining commercial and regulatory pricing for SunWater's products and services.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• storage rental fees;• service targets and results; and• (quarterly and annual) internal price determination reports.	Temporary	Retain for 15 years after last action.



4. CUSTOMER MANAGEMENT

The function of managing the relationship with SunWater's customers and clients.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Customer Agreements*
- *Complaints Handling*
- *Contract Management*
- *Enquiries*
- *Marketing*
- *Risk Management*
- *Training*



Reference	Description of records	Status	Disposal Action
4.1	<p>BILLING</p> <p><i>The activity of providing customers with clearly understood, accurate, timely and complete bills and billing information.</i></p> <p><i>See Section 6 for records relating to Financial Management.</i></p>		
4.1.1	<p>Customer billing records</p> <p>Records relating to customer billing.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • access charges; • adjustments; • allocation charges; • invoicing data; • water supply charges. • minimum charges; • irrigable drainage rates; • prices. 	Temporary	Retain for 7 years after expiry or cancellation of customer agreement or closure of customer account.
4.1.2	<p>Supporting documents</p> <p>Supporting documents and working papers relating to customer billing.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • meter batch reports; • SWIM-SAP reconciliation reports; • remaining balance reports; • Auto Telegraphic Transfers (TT) reports; • billing checklists; • recurring charge reports; and • water authority charges reports; 	Temporary	Retain for 5 years after last action.
4.2	<p>CUSTOMER LIAISON</p> <p><i>The activity of managing the general contact between SunWater and its customers and clients.</i></p>		



Reference	Description of records	Status	Disposal Action
4.2.1	<p>Records relating to liaising with and maintaining SunWater’s relationship with its customers and clients.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • customer feedback; and • Customer Satisfaction Register. 	Temporary	Retain for 7 years after last action.
4.3	<p>CUSTOMER NOTIFICATIONS</p> <p><i>The activity of giving notice to customers regarding upcoming water events and sharing information with customers regarding SunWater and its activities.</i></p> <p><i>Such events include, but are not limited to:</i></p> <ul style="list-style-type: none"> • <i>electricity interruptions;</i> • <i>supply arrangements;</i> • <i>infrastructure failures;</i> • <i>planned services;</i> • <i>rainfall shutdown events;</i> • <i>full capacity (or other) rationing;</i> • <i>water orders; and</i> • <i>water shortage restrictions.</i> 		
4.3.1	<p>Records relating to notifying customers of upcoming water events and activities.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • address lists; • customer standards of service; • newsletters; • service targets; • SunWater distribution rules; • SunWater rules; and • water orders. 	Temporary	Retain for 3 years after last action.



Reference	Description of records	Status	Disposal Action
4.4	DEBT MANAGEMENT <i>The activity of managing customers with outstanding accounts or monies owed to SunWater. See Section 6 for records relating to Financial Management.</i>		
4.4.1	Customer debt Records relating to the management and collection of debt owed to SunWater. Records may include, but are not limited to: <ul style="list-style-type: none">• applications;• directions not to take;• disconnection and/or reconnection directions.• dunning;• recovery actions; <i>See the General Retention and Disposal Schedule for Administrative Records for records relating to the implementation of internal controls related to debt and liability.</i>	Temporary	Retain for 7 years after last action.
4.5	DISPUTES <i>The activity of managing disagreements usually arising from awards, agreements, etc. Includes negotiation and resolution of the dispute.</i>		
4.5.1	Records relating to managing customer disputes, including negotiations, arbitration and disconnections. <i>See the General Retention and Disposal Schedule for Administrative Records for records relating to litigation.</i>	Temporary	Retain for 7 years after expiry or cancellation of customer agreement or closure of customer account.



Reference	Description of records	Status	Disposal Action
4.6	POLICY AND PROCEDURES <i>The activities associated with the development and establishment of SunWater policies and procedures.</i>		
4.6.1	Customer service standards Records relating to customer service standards, prepared by SunWater for customers without a contractual agreement for the provision of services, in accordance with the <i>Water Supply (Safety and Reliability) Act 2008</i> .	Temporary	Retain for 7 years after standard is superseded.



5. EXTERNAL RELATIONS

The function of managing relations between SunWater and external organisations, excluding customers and clients. Includes liaising with and providing advice and support to the community, media, industry groups, and professional associations. Also includes SunWater's relationship with all levels of government not covered by other functional keywords.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Complaints Handling*
- *Conferences*
- *Enquiries*
- *Exhibitions*
- *Incident Management*
- *Marketing*
- *Media releases*
- *Meetings*
- *Memberships*
- *Planning*
- *Policies and Procedures*
- *Presentations*
- *Procurement*
- *Risk Management*
- *Visits*



Reference	Description of records	Status	Disposal Action
5.1	INDUSTRY GROUPS <i>The activity of establishing and managing working relationships between SunWater and external industry groups in the water sector.</i>		
5.1.1	Records relating to establishing and maintaining relationships between SunWater and industry groups in the water sector. Records may include, but are not limited to: <ul style="list-style-type: none">• briefing papers; and• discussion papers.	Temporary	Retain for 7 years after last action.
5.2	STAKEHOLDER RELATIONS <i>The activity of establishing and managing working relationships between SunWater and its stakeholders.</i>		
5.2.1	Records relating to establishing and maintaining relationships between SunWater and its stakeholders. Records may include, but are not limited to: <ul style="list-style-type: none">• briefing papers; and• discussion papers.	Temporary	Retain for 7 years after last action.



6. FINANCIAL MANAGEMENT

The function of managing and controlling SunWater's revenue and expenditure. Includes the management of debts, investments, financial modelling and research.

Reference	Description of records	Status	Disposal Action
6.1	COMPLIANCE <i>The activity of adhering to external or internal standards, regulations or requirements to which SunWater is subject.</i>		
6.1.1	Financial records Financial records retained in accordance with the <i>Corporations Act 2001 (Commonwealth)</i> that: <ul style="list-style-type: none">• correctly document and explain the transactions, financial position and performance of SunWater; and• would enable true and fair financial statements to be prepared and audited.	Temporary	Retain for 7 years after the transactions covered by the records are completed.
6.2	DEBT MANAGEMENT <i>The activity of managing and settling outstanding accounts or monies owed to SunWater.</i>		
6.2.1	Records relating to the management and settlement of debt owed to SunWater. Records may include, but are not limited to: <ul style="list-style-type: none">• loans; and• term loan debtors. <i>See reference number 4.1.1 for records relating to the management of customer debts.</i>	Temporary	Retain 7 years after last action.



Reference	Description of records	Status	Disposal Action
6.3	INVESTMENTS <i>The activity of planning for and acquiring financial assets or entities to increase the performance and value of SunWater.</i>		
6.3.1	Records relating to planning, acquiring and managing SunWater's financial investments. Records may include, but are not limited to: <ul style="list-style-type: none">• statements;• reports; and• balances. <i>See General Retention and Disposal Schedule for Administrative Records for records relating to the evaluation of physical asset investments, including economic appraisals and post completion reviews.</i>	Temporary	Retain 7 years after the completion of the investment.
6.4	MODELLING <i>The activity of designing, testing and evaluating financial model profiles or systems and activities under analysis.</i>		
6.4.1	Financial modelling Records relating to financial modelling conducted on a monthly, annual or otherwise specified basis.	Temporary	Retain 7 years after last action.



7. HUMAN RESOURCES

The function of managing all persons employed by SunWater on a permanent, temporary, full-time, part-time or casual basis.

See the General Retention and Disposal Schedule for Administrative Records for other records relating to Human Resources, including personnel, industrial relations and workplace health and safety.

Reference	Description of records	Status	Disposal Action
7.1	HEALTH SURVEILLANCE <i>The activity of monitoring the health of personnel to determine fitness or injury.</i>		
7.1.1	Records relating to the health surveillance and/or monitoring of individual employees engaged in hazardous occupations or exposed to hazardous substances or dangerous goods, in accordance with the <i>Workplace Health and Safety Regulation 2008</i> . Records may include, but are not limited to: <ul style="list-style-type: none">• risk assessments (where a significant degree of risk has been identified);• health surveillance reports; and• medical monitoring reports.	Temporary	Retain for 30 years after last action.
7.2	LIAISON <i>The activity of liaising with external groups or individuals including organisations within the private sector, professional associations and the broader community.</i>		



Reference	Description of records	Status	Disposal Action
7.2.1	External providers Records relating to SunWater's liaison with external providers and organisations associated with human resource services, such as the Shared Services Agency.	Temporary	Retain for 7 years after last action.
7.3	LICENSING AND APPROVALS <i>The activity of seeking licences and approvals that are required by SunWater in order to undertake requested actions.</i>		
7.3.1	Drivers licences Records relating to drivers licences required by SunWater employees to drive particular classes of vehicles in the performance of their duties (e.g. truck driving), in accordance with the <i>Transport Operations (Road Use Management) Act 1995</i> . Includes, but is not limited to, copies of applications, renewals, suspensions and amendments.	Temporary	Retain for 7 years after expiry, surrender or cancellation of licence.
7.3.2	Electrical work licences Records relating to electrical work licences, in accordance with the <i>Electrical Safety Act 2002</i> . Includes, but is not limited to, copies of applications, renewals, suspensions and amendments.	Temporary	Retain for 7 years after expiry, surrender or cancellation of licence.



Reference	Description of records	Status	Disposal Action
7.3.3	<p>Electrical Licence Register</p> <p>Entries in the Electrical Licence Register kept in accordance with the <i>Electrical Safety Act 2002</i>.</p> <p>Entries include, but are not limited to:</p> <ul style="list-style-type: none">• prescribed details of each electrical licence holder employed by SunWater;• changes to the prescribed details of the licence holder; and• date on which the prescribed details of the licence holder were added or updated in the Register.	Temporary	Retain for 5 years after licence holder ceases to be employed by SunWater.
7.3.4	<p>Occupational certificates/licences</p> <p>Records relating to occupational certificates and licences in accordance with the <i>Workplace Health and Safety Regulation 2008</i>.</p>	Temporary	Retain for 7 years after expiry, surrender or cancellation of licence.



8. INFRASTRUCTURE DEVELOPMENT AND MAINTENANCE

The function of designing, constructing, enhancing and maintaining water infrastructure assets throughout their lifecycle from the initial design phase through to decommissioning.

See section 9 – INFRASTRUCTURE OPERATIONS for records associated with SunWater’s function of operating water infrastructure assets.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Advice*
- *Audit*
- *Contract Management*
- *Cost Control*
- *Inventory Management*
- *Meetings*
- *Planning*
- *Policies and Procedures*
- *Procurement*
- *Risk Management*
- *Stocktake*



Reference	Description of records	Status	Disposal Action
8.1	<p>COMMISSIONING</p> <p><i>The activity of bringing specifically designed and/or purpose built water infrastructure assets used for the storage, treatment and supply of water into operation.</i></p> <p><i>Records may include, but are not limited to, commissioning plans and reports.</i></p>		
8.1.1	<p>Water infrastructure assets – Significant</p> <p>Records relating to the commissioning of specifically designed and/or purpose built water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during/following construction, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.3.1, 8.4.1 and 8.5.1 for records relating to the construction, design and decommissioning of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.1.2	<p>Water infrastructure assets – Other</p> <p>Records relating to the commissioning of specifically designed and/or purpose built water infrastructure assets that do not have major significance as described in reference number 8.1.1.</p> <p><i>See reference numbers 8.3.2, 8.4.2 and 8.5.2 for records relating to the construction, design and decommissioning of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.2	<p>CONDITION MONITORING</p> <p><i>The activity of determining the condition of specifically designed and/or purpose built water infrastructure assets used for the storage, treatment and supply of water, to ascertain the need for maintenance.</i></p>		
8.2.1	<p>Records relating to monitoring the condition of water infrastructure assets to determine maintenance needs.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• condition monitoring work orders;• notifications of work order;• surveillance reports; and• condition reports. <p><i>See reference number 8.10.1 for records relating to preventative maintenance.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.



Reference	Description of records	Status	Disposal Action
8.3	<p>CONSTRUCTION</p> <p><i>The activity of building specifically designed and/or purpose built water infrastructure assets used for the storage, treatment and supply of water.</i></p> <p><i>Records may include, but are not limited to:</i></p> <ul style="list-style-type: none">• <i>construction programs;</i>• <i>construction reports;</i>• <i>inspection records;</i>• <i>pre-construction reports;</i>• <i>submissions;</i>• <i>progress/status reports;</i>• <i>schedules;</i>• <i>surveillance reports; and</i>• <i>work orders.</i>		



Reference	Description of records	Status	Disposal Action
8.3.1	<p><i>Water infrastructure assets – Significant</i></p> <p>Records relating to the construction of water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during/following construction, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.1.1, 8.4.1 and 8.5.1 for records relating to the commissioning, design and decommissioning of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.3.2	<p>Water infrastructure assets – Other</p> <p>Records relating to the construction of specifically designed and/or purpose built water infrastructure assets that do not have major significance as described in reference number 8.3.1.</p> <p><i>See reference numbers 8.1.2, 8.4.2 and 8.5.2 for records relating to the commissioning, design and decommissioning of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.4	<p>DECOMMISSIONING</p> <p><i>The activity of decommissioning specifically designed and/or purpose built water infrastructure used for the storage, treatment and supply of water. Includes the disposal or transfer of the water infrastructure asset to another water supplier (e.g. SEQ Water).</i></p> <p><i>Records include, but are not limited to, decommissioning plans and reports.</i></p>		



Reference	Description of records	Status	Disposal Action
8.4.1	<p>Water infrastructure assets – Significant</p> <p>Records relating to the decommissioning of water infrastructure assets that have historical significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during/following construction, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.1.1, 8.3.1 and 8.5.1 for records relating to the commissioning, design and construction of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.
8.4.2	<p>Water infrastructure assets – Other</p> <p>Records relating to the decommissioning of water infrastructure assets that do not have major significance as described in reference number 8.4.1</p> <p><i>See reference numbers 8.1.2, 8.3.2 and 8.5.2 for records relating to the commissioning, design and construction of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.



Reference	Description of records	Status	Disposal Action
8.5	<p>DESIGN</p> <p><i>The activity of designing water infrastructure assets used for the storage, treatment and supply of water.</i></p> <p><i>Records may include, but are not limited to:</i></p> <ul style="list-style-type: none">• <i>preliminary (conceptual) design drawings and reports;</i>• <i>design output review reports;</i>• <i>design reviews;</i>	<ul style="list-style-type: none">• <i>final design drawings and maps;</i>• <i>specifications.</i>	



Reference	Description of records	Status	Disposal Action
8.5.1	<p><i>Water infrastructure assets – Significant</i></p> <p>Records relating to the design of water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during/following construction, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.1.1, 8.3.1 and 8.4.1 for records relating to the commissioning, construction and decommissioning of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.5.2	<p>Water infrastructure assets – Other</p> <p>Records relating to the design of water infrastructure assets that do not have major significance as described under reference number 8.5.1.</p> <p><i>See reference numbers 8.1.2, 8.3.2 and 8.4.2 for records relating to the commissioning, construction and decommissioning of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.5.3	<p>Check Print Drawings</p> <p>Check print drawings created during the design drafting process.</p>	Temporary	Retain until completion of project.
8.6	<p>HANDOVERS</p> <p><i>The activity of bringing a specific water infrastructure project to a close.</i></p>		
8.6.1	<p>Records relating to the finalisation of water infrastructure projects.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• notifications;• operations and maintenance manuals;• emergency action plans;• design and construction inspection reports; and• project completion reports.	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.7	<p>INVESTIGATIONS</p> <p><i>The activity of conducting an examination or inquiry for the construction of water infrastructure assets. Includes geotechnical and groundwater investigations, environmental assessments and investigation reports.</i></p>		



Reference	Description of records	Status	Disposal Action
8.7.1	<p><i>Water infrastructure assets – Significant</i></p> <p>Records relating to investigations conducted for the construction of water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during/following construction, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.1.1, 8.3.1 and 8.5.1 for records relating to the design, construction and commissioning of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.7.2	<p>Water infrastructure assets - Other</p> <p>Records relating to investigations conducted for the construction of water infrastructure assets that do not have major significance as described in reference number 8.7.1.</p> <p><i>See reference number 8.1.2, 8.3.2 and 8.5.2 for records relating to the design, construction and commissioning of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.8	<p>METER MANAGEMENT</p> <p><i>The activity of managing meters used for measuring and registering water usage by SunWater clients. Includes reading and recording usage data and the repair and replacement of meters.</i></p>		
8.8.1	<p>Water meters</p> <p>Records relating to meter readings and the maintenance of water meters.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• disconnections;• meter adjustment reports;• meter readings;• meter repairs• meter tests;• metered off-take installations;• special meter readings; and• water connection designs.	Temporary	Retain 7 years after last action.
8.9	<p>MODELLING</p> <p><i>The activity of designing, testing and evaluating sample model profiles or systems and activities under analysis. Includes hydraulic, hydrologic, structural and geotechnical modelling.</i></p> <p><i>Records include technical reports and supporting data (e.g. calculation worksheets).</i></p>		



Reference	Description of records	Status	Disposal Action
8.9.1	<p><i>Water infrastructure assets – Significant</i></p> <p>Records relating to modelling conducted for the construction of water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during / following construction, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.1.1, 8.3.1 and 8.5.1 for records relating to the design, construction and commissioning of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.9.2	<p>Water infrastructure assets - Other</p> <p>Records relating to modelling conducted for the construction of water infrastructure assets that do not have major significance as described in reference number 8.9.1.</p> <p>Records include technical reports and supporting data (e.g. calculation worksheets, etc).</p> <p><i>See reference number 8.1.2, 8.3.2 and 8.5.2 for records relating to the design, construction and commissioning of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.10	<p>PREVENTATIVE MAINTENANCE</p> <p><i>The activity of periodically performing tasks to improve equipment reliability, e.g. lubrication, overhaul, etc.</i></p>		
8.10.1	<p>Records relating to the performance of preventative maintenance on water infrastructure assets.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• high voltage switching sheets;• operations and maintenance schedules; and• work instructions.	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.



Reference	Description of records	Status	Disposal Action
8.11	<p>REFURBISHMENT</p> <p><i>The activity of upgrading and enhancing water infrastructure assets. Includes refurbishment and enhancement planning to maintain existing standards of service.</i></p> <p><i>Records include, but are not limited to:</i></p> <ul style="list-style-type: none"> • <i>backlog works programs;</i> • <i>on-site commission reports;</i> • <i>refurbishment and augmentation program;</i> • <i>work method statements.</i> 		
8.11.1	<p>Water infrastructure assets – Significant</p> <p>Records relating to the conservation and refurbishment of water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none"> • controversy during/following construction, e.g. protests on a large scale or extensive media attention; • recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council; • cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons; • scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods; • high aesthetic characteristics valued by the community; and • environmental value, e.g. unique eco-friendly construction techniques. 	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.11.2	<p>Extensive Refurbishments</p> <p>Records relating to <i>extensive</i> refurbishments of water infrastructure assets that do not have major significance as described in reference number 8.11.1.</p> <p>Includes major structural repairs and renovations.</p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.11.3	<p>Limited Refurbishments</p> <p>Records relating to <i>limited</i> refurbishments of water infrastructure assets that do not have major significance as described in reference number 8.11.1.</p> <p>Includes painting and landscaping.</p> <p>See reference number 8.10.1 for records relating to preventative maintenance.</p>	Temporary	Retain for 10 years after last action.
8.12	<p>RESEARCH</p> <p><i>The activity of gathering, analysing and interpreting information to support the development of projects and the business activities of SunWater.</i></p> <p>See the General Retention and Disposal Schedule for Administrative Records for legal deposit requirements for publications.</p>		
8.12.1	<p>Infrastructure development and maintenance</p> <p>Records relating to research undertaken or commissioned by SunWater in support of infrastructure development and maintenance projects.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• research and development applications submitted to the Cooperative Research Centre (CRC) program for research funding; and• research and development reports.	Temporary	Retain for 25 years after last action.



Reference	Description of records	Status	Disposal Action
8.12.2	<p>Working papers</p> <p>Working papers relating to research undertaken or commissioned by SunWater in support of infrastructure development and maintenance projects.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• technical information;• externally published materials; and• draft research and development reports.	Temporary	Retain until reference ceases.
8.13	<p>RESOURCING</p> <p><i>The activity of managing project resources, including support services, infrastructure and third party services.</i></p>		
8.13.1	<p>Records relating to the management of resourcing for water infrastructure asset projects.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• cost-benefit analyses;• proposals;• briefs;• competency matrices;• resumes; and• schedules. <p><i>See section 6 FINANCIAL MANAGEMENT for financial records.</i></p>	Temporary	Retain for 7 years after completion of project.



Reference	Description of records	Status	Disposal Action
8.14	<p>SURVEYING</p> <p><i>The activity of surveying land to determine the nature, boundaries and the extent of the land for the construction of water infrastructure assets.</i></p> <p><i>Records include, but are not limited to:</i></p> <ul style="list-style-type: none">• cadastral surveys;• engineering surveys;• floodplain mapping;• dam and weir site mapping;• pipeline surveys; and• land acquisition surveys.		



Reference	Description of records	Status	Disposal Action
8.14.1	<p><i>Water infrastructure assets – Significant</i></p> <p>Records relating to land surveys and mapping undertaken for the construction of water infrastructure assets that have major significance.</p> <p>Factors that can determine a permanent retention include:</p> <ul style="list-style-type: none">• controversy during / following construction of water infrastructure asset, e.g. protests on a large scale or extensive media attention;• recognised historical value, e.g. currently or previously listed on the Queensland Heritage Register, National Trust list, local government heritage list, or with the Australian Heritage Council;• cultural value, e.g. building or structure has a strong or special association with the community for social and/or spiritual reasons;• scientific or technical value, e.g. building or structure utilised non-standard construction materials and methods;• high aesthetic characteristics valued by the community; and• environmental value, e.g. unique eco-friendly construction techniques. <p><i>See reference numbers 8.1.1, 8.3.1 and 8.5.1 for records relating to the design, construction and commissioning of significant water infrastructure assets.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
8.14.2	<p>Water infrastructure assets – Other</p> <p>Records relating to land surveys and mapping undertaken for the construction of water infrastructure assets that do not have major significance as described in reference number 8.14.1. Includes the collection of data for future infrastructure needs.</p> <p><i>See reference number 8.1.2, 8.3.2 and 8.5.2 for records relating to the design, construction and commissioning of other water infrastructure assets.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
8.15	<p>TESTING</p> <p><i>The activity of assessing whether water infrastructure components and systems conform to specified requirements.</i></p>		
8.15.1	<p>Records relating to engineering tests of water supply and distribution infrastructure components and systems against specified requirements.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• audit and compliance tests;• calibration; and• test result certificates.	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.



9. INFRASTRUCTURE OPERATIONS

The function of operating water infrastructure assets. Includes headworks and distribution systems, such as piping, pumps, drains, channels, treatment plants, etc.

See SECTION 8 – INFRASTRUCTURE DEVELOPMENT AND MAINTENANCE for records relating to development and maintenance of water infrastructure assets.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Advice*
- *Contract Management*
- *Cost Control*
- *Disposal*
- *Enquiries*
- *Meetings*
- *Planning*
- *Policies and Procedures*
- *Procurement*
- *Risk Management*
- *Security*



Reference	Description of records	Status	Disposal Action
9.1	CHEMICAL MANAGEMENT <i>The activity of managing chemical stores held by SunWater.</i> <i>See the General Retention and Disposal Schedule for Administrative Records for records relating to investigations of health and safety issues.</i>		
9.1.1	Chemical Stores Records relating to the management of chemical stores, in accordance with the <i>Dangerous Goods Safety Management Regulation 2001</i> . Records may include, but are not limited to: <ul style="list-style-type: none">• hazardous substance registers;• Material Safety Data Sheets (MSDS);• risk assessments (where no significant risk has been identified); and• training and induction records. <i>See reference number 7.1.1 for health surveillance and monitoring records, including risk assessments, for personnel who have been exposed to hazardous substances.</i>	Temporary	Retain for 5 years after last action.
9.2	DAM MANAGEMENT <i>The activity of managing the operation of dams as reliable and secure water supply solutions to meet urban, industrial and agricultural water demands, in accordance with the Water Supply (Safety and Reliability) Act 2008. Includes engineering assessments and dam safety reviews.</i>		



Reference	Description of records	Status	Disposal Action
9.2.1	<p>Records relating to managing and operating dams as water demand supply solutions.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • dam break analyses; • dam safety inspections; • dam safety investigations; • dam safety seismic monitoring; • failure impact assessments; • safety instrument monitoring; • dam safety surveillance; • data books; • design flood hydrology; • dam safety reviews; • deformation surveys. 	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
9.3	<p>DROUGHT MANAGEMENT</p> <p><i>The activity of devising, implementing and managing alternative water supply arrangements during periods of drought or prolonged low availability of water or where there is a water availability risk.</i></p>		
9.3.1	<p><i>Drought management plans</i></p> <p>Records relating to drought management plans submitted by SunWater for registration with the water regulator, in accordance with the <i>Water Supply (Safety and Reliability) Act 2008</i>.</p> <p>Includes notifications and amendments to the drought management plan.</p>	Temporary	Retain for 7 years after superseded.



Reference	Description of records	Status	Disposal Action
9.3.2	<p>Records relating to developing, implementing and managing alternative water supply arrangements during a drought.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • climate studies; • water use conservation plans; • technical reports; • calculation worksheets; • guidelines; and • models. 	Temporary	Retain for 3 years after last action.
9.4	<p>ECOLOGICAL MONITORING</p> <p><i>The activity of managing ecological monitoring programs associated with SunWater's operations. Includes aquatic ecosystem monitoring programs, habitat assessments and population surveys.</i></p>		
9.4.1	<p><i>Hazardous substances</i></p> <p>Records relating to monitoring the impact of hazardous substances on the ecosystem, including aquatic flora and fauna.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • records of fish deaths; • water quality test reports; • habitat assessments; • information on revegetation; • ecosystem monitoring programs; and • population surveys. <p><i>See section 9.9 for records relating to environmental investigations.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
9.4.2	<p><i>Water supply and distribution infrastructure</i></p> <p>Records relating to monitoring the impact of water supply and distribution infrastructure operations on the ecosystem, including aquatic flora and fauna.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• records of fish deaths;• water quality test reports;• habitat assessments;• information on revegetation;• ecosystem monitoring programs; and• population surveys.	Temporary	Retain for 10 years after last action.
9.5	<p>ENERGY MANAGEMENT</p> <p><i>The activity of developing, implementing, and managing energy management programs associated with SunWater's operations. Includes carbon accounting, emissions trading and energy efficiency opportunities.</i></p>		



Reference	Description of records	Status	Disposal Action
9.5.1	<p>Energy consumption, efficiency</p> <p>Records relating to identifying, evaluating, implementing and reporting on energy consumption, energy production, energy management and energy efficiency opportunities, as well as greenhouse gas emissions.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• carbon accounting;• emissions trading;• report on greenhouse gas emissions, energy production and energy consumption, in accordance with the <i>National Greenhouse and Energy Reporting Act 2007 (Commonwealth)</i>; and• Energy Efficiencies Opportunities (EEO) program, including assessment plans, in accordance with the <i>Energy Efficiency Opportunities Act 2006 (Commonwealth)</i>.	Temporary	Retain for 8 years after last action.
9.6	<p>FLOOD MANAGEMENT</p> <p><i>The activity of planning, managing and implementing measures and infrastructure to minimise and control the impact of flooding.</i></p>		
9.6.1	<p>Records relating to the management of floods, including the planning and implementation of control measures to minimise and control the impact of flooding.</p> <p>Records may include, but are not limited to, flood modelling, flood management plans and emergency action plans.</p> <p><i>See reference number 9.7.1 for records relating to the prevention of flooding.</i></p>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
9.7	FLOOD MITIGATION AND DRAINAGE <i>The activity of carrying out processes involved in flood prevention and measures taken to reduce the effects of floods.</i>		
9.7.1	Records relating to the prevention of floods, including the planning and implementation of mitigation and drainage measures, and the development of flood mitigation structures. Records include, but are not limited to, flood modelling, feasibility studies and emergency action plans. <i>See reference number 9.6.1 for records relating to the management of floods when they occur.</i>	Permanent	Retain permanently.
9.7.2	Flood mitigation manuals Records relating to flood mitigation manuals, prepared in accordance with the <i>Water Supply (Safety and Reliability) Act 2008</i> . Includes notifications and amendments to the flood mitigation manual.	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
9.8	HYDROGRAPHY <i>The description and analysis of the physical conditions, boundaries, flow and related characteristics of surface water.</i>		
9.8.1	Records relating to describing and analysing the characteristics of surface water. Records may include, but are not limited to: <ul style="list-style-type: none">• water quantities; and• gauging station inspection reports.	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.



Reference	Description of records	Status	Disposal Action
9.9	INVESTIGATIONS <i>The activity of conducting an investigation into water infrastructure operations. Includes geotechnical and groundwater investigations, environmental assessments and investigation reports.</i>		
9.9.1	Environmental investigations – major Records relating to investigations into environmental incidents, in accordance with the <i>Environmental Protection Act 1994</i> . Records may include, but are not limited to environmental assessments, site investigations, notifications and investigation reports. Includes, but is not limited to: <ul style="list-style-type: none">incidents that set a precedent;incidents that arouse controversy such as protests on a large scale or attract extensive media attention;major air, land and water pollution;major land contamination caused by chemicals or other hazardous substances;major uncontrolled release of herbicide or waste materials; andinvestigations into land on the Environmental Management Register and/or Contaminated Land Register. <i>See reference number 9.9.2 for records relating to investigations of other environmental incidents.</i>	Permanent	Retain permanently.



Reference	Description of records	Status	Disposal Action
9.9.2	<p><i>Environmental investigations – other</i></p> <p>Records relating to investigations into environmental incidents in accordance with the <i>Environmental Protection Act 1994</i>, that are not covered under reference number 9.9.2.</p> <p>Records may include, but are not limited to environmental assessments, site investigations, notifications and investigation reports.</p> <p><i>See reference number 9.9.1 for records relating to investigations of major environmental incidents.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
9.10	<p>LICENSING AND APPROVALS</p> <p><i>The activity of seeking and granting licences and approvals required by or from SunWater to undertake requested action.</i></p>		
9.10.1	<p><i>Riverine protection permits</i></p> <p>Records relating to riverine protection permits issued in accordance with the <i>Water Act 2000</i>. Includes records relating to the application, approval, amendment, suspension and cancellation of the permit.</p>	Temporary	Retain for 7 years after expiry, surrender, cancellation or transfer of the licence or approval.
9.11	<p>RECREATION AREAS MANAGEMENT</p> <p><i>The activity of managing recreational areas owned, leased or managed by SunWater.</i></p>		



Reference	Description of records	Status	Disposal Action
9.11.1	<p>Commercial use</p> <p>Records relating to applications for use of recreational areas owned, leased or managed by SunWater for commercial activities.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• applications for commercial operations; and• fish stocks.	Temporary	Retain for 10 years after last action.
9.11.2	<p>Leisure use</p> <p>Records relating to applications for use of recreation areas owned, leased or managed by SunWater for leisure activities, such as camping.</p>	Temporary	Retain for 5 years after last action.
9.12	<p>RESEARCH</p> <p><i>The activity of gathering, analysing and interpreting information to support the development of projects and the business activities of SunWater.</i></p>		
9.12.1	<p>Infrastructure operations projects</p> <p>Records relating to research undertaken or commissioned by SunWater in support of infrastructure operations projects.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• research and development applications submitted to the Cooperative Research Centre (CRC) program for research funding; and• research and development reports.	Temporary	Retain for 25 years after last action.



Reference	Description of records	Status	Disposal Action
9.12.2	<p>Working papers</p> <p>Working papers relating to research undertaken or commissioned by SunWater in support of infrastructure operations projects.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• technical information;• copies of published materials; and• draft research and development reports.	Temporary	Retain until reference ceases.
9.13	<p>RESOURCING</p> <p><i>The activity of managing project resources, including support services, infrastructure and third party services.</i></p>		
9.13.1	<p>Records relating to managing project resources, including support services, infrastructure and contracting or consulting services.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• cost-benefit analyses;• proposals;• briefs;• competency matrices; and• resumes• schedules. <p><i>See reference number 8.13.1 for records relating to resourcing for infrastructure development projects.</i></p>	Temporary	Retain for 7 years after completion of project.
9.14	<p>WASTEWATER MANAGEMENT</p> <p><i>The activity of managing the treatment of used water, human waste and chemicals that flow through sewers.</i></p>		



Reference	Description of records	Status	Disposal Action
9.14.1	<p>Treatment/Tracking</p> <p>Records relating to the treatment of wastewater, including used water, human waste and other chemicals, in accordance with the <i>Environmental Protection (Waste Management) Regulation 2000</i>.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• waste tracking forms; and• incident investigations. <p><i>See the General Retention and Disposal Schedule for Administrative Records for records relating to the disposal and removal of hazardous materials and waste from buildings or structures.</i></p>	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
9.15	<p>WATER DISTRIBUTION</p> <p><i>The activity of planning for and providing water distribution services to customers via SunWater's water distribution system infrastructure, including pump stations, channels and pipelines.</i></p>		
9.15.1	<p>Records relating to water distribution services to SunWater customers.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• running sheets;• logbooks/daybooks; and• work requests.	Temporary	Retain for 7 years after the transfer, disposal or demolition of the water infrastructure asset.
9.16	<p>WATER QUALITY</p> <p><i>The activity of monitoring and/or maintaining appropriate water quality levels within dams, rivers, channels etc</i></p>		



Reference	Description of records	Status	Disposal Action
9.16.1	<p>Drinking Water Quality Management Plan</p> <p>Records relating to Drinking Water Quality Management Plan, developed and submitted to the water regulator in accordance with the <i>Water Supply (Safety and Reliability) Act 2008</i>.</p> <p>Includes applications, approvals, decision notices, amendments and audit reports.</p>	Temporary	Retain for 5 years after plan is superseded.
9.16.2	<p>Monitoring</p> <p>Records relating to the monitoring of water quality levels. Includes, but is not limited to, the monitoring of chemicals, substances and micro-organisms e.g. blue-green algae.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• water quality analysis data sheets;• analysis reports;• blue green algae analysis reports; and• submersible data loggers (SDL).	Temporary	Retain for 15 years after last action.
9.16.3	<p>Other records relating to monitoring and maintaining appropriate water quality levels. Records may include, but are not limited to, monthly reports and summary analysis reports.</p>	Temporary	Retain for 2 years after last action.
9.16.4	<p>Equipment calibration</p> <p>Records relating to the calibration of equipment used to test and monitor the quality of water supplies.</p> <p>Records may include, but are not limited to, calibration results and certificates.</p>	Temporary	Retain for 3 years after last action.



Reference	Description of records	Status	Disposal Action
9.17	WATER TREATMENT <i>The activity of managing the processes involved in treating water prior to distribution.</i>		
9.17.1	Treatment Records relating to the treatment of water supplies, including the use of disinfectants, antioxidants, coagulants, flocculants, algaecides, oxidants and chemicals for softening, pH adjustment, fluoridation, chlorination and scale prevention purposes. Records include, but are not limited to: <ul style="list-style-type: none">• log sheets;• monthly reports;• water sample statistics; and• photographs.	Permanent	Retain permanently.
9.18	WEED MANAGEMENT <i>The activity of investigating and managing weed issues in SunWater storages, land, and distribution systems.</i>		



Reference	Description of records	Status	Disposal Action
9.18.1	<p>Noxious pest weeds</p> <p>Records relating to the removal, eradication, and control of noxious pest weeds.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• herbicide applications;• weed hygiene declaration;• weed spraying program/schedule• wash down bays;• exclusion zone areas.• herbicide training checklist;• weed management reports;• Material Safety Data Sheets (MSDS); and• signage.	Temporary	Retain for 25 years after last action.



10. PROPERTY MANAGEMENT

The function of managing the procurement, leasing, maintenance and disposal of land, and interests in land, buildings, offices, residences, sheds and workshops by SunWater.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Accommodation Services*
- *Advice*
- *Contract Management*
- *Disposal*
- *Enquiries*
- *Insurance*
- *Leasing*
- *Maintenance*
- *Planning*
- *Policies and Procedures*
- *Procurement*
- *Security*
- *Submissions*



Reference	Description of records	Status	Disposal Action
10.1	TENURE MANAGEMENT <i>The activity of managing tenure of land owned or leased by SunWater.</i>		
10.1.1	Records relating to managing land tenure for the purposes of accessing land. Records may include, but are not limited to: <ul style="list-style-type: none">• commercial leases;• freehold land;• mining leases;• permissions to use;• permits to occupy;• recreation area leases;• flood margin leases;• grazing land;• notifications;• property register;• perpetual leases; and• utilities leases. <i>See the General Retention and Disposal Schedule for Administrative Records for other tenure records relating to capital assets required for administrative purposes.</i>	Temporary	Retain for 7 years after expiry, surrender, or transfer of lease.
10.2	VALUATIONS <i>The activity or process of assessing the value or price of property.</i>		



Reference	Description of records	Status	Disposal Action
10.2.1	<p>Records relating to the assessment of property values.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• commercial valuations, and• statutory valuations. <p><i>See the General Retention and Disposal Schedule for Administrative Records for other tenure records relating to capital assets required for administrative purposes.</i></p>	Temporary	Retain for 7 years after expiry, surrender, or transfer of lease.



11. WATER MANAGEMENT

The function of managing, via SunWater's relationship with its regulator, ownership of water and infrastructure licensing and operational conditions.

See the General Retention and Disposal Schedule for Administrative Records for records relating to:

- *Advice*
- *Audit*
- *Contract Management*
- *Planning*
- *Procurement*



Reference	Description of records	Status	Disposal Action
11.1	<p>COMPLIANCE</p> <p><i>The activity of adhering to external or internal standards, regulations or requirements to which SunWater is subject.</i></p> <p><i>See General Retention and Disposal Schedule for Administrative Records for records relating to Workplace Health and Safety and compliance with SunWater's Code of Conduct.</i></p>		
11.1.1	<p>Records relating to complying with requirements to which SunWater is subject, including:</p> <ul style="list-style-type: none"> • Resource Operations Plans (ROP); • Resource Operations Licences (ROL); and • Interim Resource Operations Licences (IROL). <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • quarterly reports; • water allocations; • announced allocations process; • continuous sharing; • forward draw. • temporary trades; • water harvesting; • carry over water; and • credit water. 	Temporary	Retain for 10 years after last action.
11.1.2	Records relating to the development of compliance documentation, including working documents.	Temporary	Retain 3 years after last action.
11.2	<p>LICENSING AND APPROVALS</p> <p><i>The activity of seeking and granting licences and approvals required by or from SunWater to undertake requested action.</i></p>		



Reference	Description of records	Status	Disposal Action
11.2.1	<p>Service Provider Registration</p> <p>Records relating to SunWater's registration as a water service provider under the <i>Water Supply (Safety and Reliability) Act 2008</i>.</p> <p>Includes applications, amendments, notices and supporting documentation.</p>	Temporary	Retain for 7 years after expiry, surrender, cancellation or transfer of registration.
11.2.2	<p>Water operations licences</p> <p>Records relating to water operations licences, issued in accordance with the <i>Water Act 2000</i>, including records relating to the approval, amendment, transfer or cancellation of the licence.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• Resource Operations Licences;• Interim Resource Operations Licences; and• Distribution Operations Licences.	Temporary	Retain for 7 years after surrender, cancellation or transfer of the licence.
11.2.3	<p>Water licences</p> <p>Records relating to water licences, issued in accordance with the <i>Water Act 2000</i>.</p> <p>Records may include, but are not limited to, applications and supporting documentation, notices and seasonal water assignment.</p>	Temporary	Retain for 7 years after expiry, surrender or cancellation of the licence.
11.2.4	<p>Water permits</p> <p>Records relating to applications for water permits, obtained by SunWater in accordance with the <i>Water Act 2000</i>.</p> <p>Includes records relating to the approval, surrender or cancellation of a permit.</p>	Temporary	Retain for 7 years after expiry, surrender or cancellation of the permit.



Reference	Description of records	Status	Disposal Action
11.2.5	<p><i>Riparian allowance agreements</i></p> <p>Records relating to agreements with riparian water users to establish an allowance of water to be used for stock and domestic purposes, in accordance with the <i>Water Act 2000</i>.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none">• terms of agreement;• forms; and• notices.	Temporary	Retain for 7 years after expiry, surrender, cancellation or transfer of the agreement.
11.2.6	<p><i>Product approvals</i></p> <p>Records relating to product approvals, which stipulate rules for the provision of water to customers.</p>	Temporary	Retain for 7 years after expiry, surrender, cancellation or transfer of the approval.



12. LEGACY RECORDS

This section covers legacy records held by SunWater. Includes maps and plans relating to the construction of water supply works for local authority areas.

Reference	Provenance/Series Information	Date Range	Status	Disposal Action
12.1	Mary River – Kalah Creek – Flood Diversion Study	1895	Permanent	Transfer to Queensland State Archives
12.2	Mary River – Flood Gauges	c.1900	Permanent	Transfer to Queensland State Archives
12.3	Mary River – Map	c.1880	Permanent	Transfer to Queensland State Archives
12.4	Brisbane River – Flood Relief Channels		Permanent	Transfer to Queensland State Archives
12.5	Water Supply Department – Brisbane River – proposed embankment		Permanent	Transfer to Queensland State Archives
12.6	Water Supply Department – Brisbane River – proposed diversion		Permanent	Transfer to Queensland State Archives
12.7	Water Supply Department – Brisbane River Cross Sections		Permanent	Transfer to Queensland State Archives
12.8	Brisbane Board of Water Works – Engines, Pipes & Boilers	1889	Permanent	Transfer to Queensland State Archives
12.9	Brisbane Board of Water Works – Beam Engines & Pumps	1889	Permanent	Transfer to Queensland State Archives



Reference	Provenance/Series Information	Date Range	Status	Disposal Action
12.10	Brisbane Board of Water Works – Compensating Pump Engine	1889	Permanent	Transfer to Queensland State Archives
12.11	Mt Isa Water Supply – Reservoir	1934	Permanent	Transfer to Queensland State Archives
12.12	Mt Isa Swimming Baths	c.1930	Permanent	Transfer to Queensland State Archives
12.13	Childers Water Supply – Pump House	1940	Permanent	Transfer to Queensland State Archives
12.14	4 Inch High Pressure Valve – cast iron fitting		Temporary	Retain until reference use ceases
12.15	Eulo Water Supply	1938	Permanent	Transfer to Queensland State Archives
12.16	Pressure Grouter	1937	Temporary	Retain until reference use ceases
12.17	16 Inch Ball Joint – cast iron pipe fitting	1936	Temporary	Retain until reference use ceases
12.18	Kingaroy Water Supply – Filtration Plant	1936	Permanent	Transfer to Queensland State Archives
12.19	Kingaroy Water Supply – Investigation	1936	Permanent	Transfer to Queensland State Archives
12.20	Bundaberg Water Tower	c.1930	Permanent	Transfer to Queensland State Archives



Reference	Provenance/Series Information	Date Range	Status	Disposal Action
12.21	Bundaberg Water Works – Cornish Boiler	c.1926	Permanent	Transfer to Queensland State Archives
12.22	Bundaberg Water Supply – Reticulation Plan	1938	Permanent	Transfer to Queensland State Archives
12.23	Bundaberg Water Works – Baldwin Lagoon Main	1926	Permanent	Transfer to Queensland State Archives
12.24	Bundaberg Water Works – Water Well		Temporary	Retain until reference use ceases
12.25	Rifle Creek Dam (Mt Isa)	1926	Permanent	Transfer to Queensland State Archives
12.26	Rifle Creek Dam (Mt Isa) – Multiple Arch	1928	Permanent	Transfer to Queensland State Archives
12.27	Charters Towers – Pump Station Site – investigation	c.1880	Permanent	Transfer to Queensland State Archives
12.28	Charters Towers – Waterworks – Tramway	c.1880	Permanent	Transfer to Queensland State Archives
12.29	Roma Water Supply – Layout	1905	Permanent	Transfer to Queensland State Archives
12.30	Roma Water Supply – Bore Head	1905	Permanent	Transfer to Queensland State Archives
12.31	Roma Water Supply – Gas Works	1905	Permanent	Transfer to Queensland State Archives



Reference	Provenance/Series Information	Date Range	Status	Disposal Action
12.32	Roma Water Supply – Apparatus for Separating Water and Gas	1905	Permanent	Transfer to Queensland State Archives
12.33	Roma Water Supply – Gas Holder Tank	1905	Permanent	Transfer to Queensland State Archives
12.34	Roma Water Supply – Measuring Flow of Gas	1905	Permanent	Transfer to Queensland State Archives
12.35	Roma Water Supply – Gas Holder	1905	Permanent	Transfer to Queensland State Archives
12.36	Roma Water Supply – Gas Holder	1905	Permanent	Transfer to Queensland State Archives
12.37	Roma Water Supply – Gas Holder	1905	Permanent	Transfer to Queensland State Archives
12.38	Gympie Water Works – Engine and Boiler		Permanent	Transfer to Queensland State Archives
12.39	Gympie City Council – Power House	1935	Permanent	Transfer to Queensland State Archives
12.40	Gympie Water Tower		Temporary	Retain until reference use ceases
12.41	Gympie Water Supply – Pump Well	1929	Permanent	Transfer to Queensland State Archives
12.42	Gympie Water Supply – Balancing Storage	1927	Permanent	Transfer to Queensland State Archives



Reference	Provenance/Series Information	Date Range	Status	Disposal Action
12.43	Gympie Water Supply – Footing Details	1929	Permanent	Transfer to Queensland State Archives
12.44	Gympie Water Supply – Pump House Extension	1929	Permanent	Transfer to Queensland State Archives
12.45	Charleville Meatworks – Water Tower		Temporary	Retain until reference use ceases
12.46	Charleville Water Works – Pipe Fittings		Temporary	Retain until reference use ceases
12.47	Charleville Water Works – Pipe Fittings		Temporary	Retain until reference use ceases
12.48	Warwick Sewerage Survey	1938	Permanent	Transfer to Queensland State Archives
12.49	Dawson River – Power House – Wall Detail		Temporary	Retain until reference use ceases
12.50	Dawson River – Power House - Layout		Temporary	Retain until reference use ceases
12.51	Blackall Town Bore	1917	Permanent	Transfer to Queensland State Archives
12.52	Blackall Town Water Supply – Cooling Tank	1917	Temporary	Retain until reference use ceases
12.53	Blackall Town Water Supply – Cooling Tank - Fittings	1917	Temporary	Retain until reference use ceases



Reference	Provenance/Series Information	Date Range	Status	Disposal Action
12.54	Coolangatta Water Supply – Suction Well	1934	Temporary	Retain until reference use ceases
12.55	Coolangatta Water Supply - Outlet	1934	Temporary	Retain until reference use ceases
12.56	Woorabinda Aboriginal Settlement – Water Supply	1930	Permanent	Transfer to Queensland State Archives
12.57	Mareeba Water Supply – Pump Well	1913	Permanent	Transfer to Queensland State Archives
12.58	Gatton Water Supply – Well and Floor Detail	1934	Temporary	Retain until reference use ceases
12.59	Gatton Water Supply – Engineer’s House	1935	Permanent	Transfer to Queensland State Archives
12.60	Mareeba Water Supply – Pump Station	1913	Permanent	Transfer to Queensland State Archives



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