



RETENTION AND DISPOSAL SCHEDULE DEVELOPMENT OR REVIEW CHECKLIST

When your agency is ready to develop or review a retention and disposal schedule, get in contact with QSA so we can talk you through the process. Before you submit a request for disposal authorisation, please consult this process.

Developing or reviewing a retention and disposal schedule

Background research

Before submitting the retention and disposal schedule and appraisal log to QSA, have you done the following:

BACKGROUND RESEARCH

Identified the legislation your agency administers and have mapped it for its recordkeeping requirements.

Use [Legislative mapping template](#).

See [Identifying legislative recordkeeping requirements](#) and [How to complete a legislative mapping template](#) to help complete the template.

Completed the [Retention and disposal schedule background information template](#).

See [How to complete a retention and disposal schedule – background information template](#).

Retention and disposal schedule

In developing or reviewing the retention and disposal schedule, have you done the following:

SCHEDULE

The schedule is set out in the following format - functions, activities, record classes.

Use [Retention and disposal schedule template](#).

Scope notes for functions, activities and record classes are succinct and accurate.

- Retention periods and disposal triggers are clear and unambiguous.

See the [Disposal triggers in the Glossary](#) for the generic triggers to use.

- Record classes cover core business records only and do not duplicate those found in the [General retention and disposal schedule](#) (GRDS).

Record classes from the GRDS can be used ONLY if the retention period will be different in this schedule.

See [How to complete a retention and disposal schedule template](#) to help complete the schedule.

Appraisal log

In developing and reviewing the appraisal log, have you done the following:

APPRAISAL LOG

- The appraisal log has the same scope notes and retention periods as the schedule.

Use [Appraisal log template](#).

- The appraisal log provides sufficient information about each record class.

- Retention periods are adequately justified in the section 'Why the records are retained for this retention period'.

- If a record class is a duplicate from the GRDS, you have provided sufficient justification for its inclusion in the schedule.

- Have you consulted with the relevant business areas to get information about why records are created and on how long records should be kept for.

- Have you checked the other jurisdictions in Australia and other Queensland agencies for schedules with similar functions.

See [How to complete the appraisal log template](#) to help complete the appraisal log.

Summary of changes

If the schedule is a revision of a current schedule, you may also need to complete the [Summary of changes template](#).

Approval process

When you submit the schedule and appraisal log to QSA, the appraisal archivist will review the documents and will get in touch to discuss them with you.

Internal QSA review process

As part of an internal QSA review process, the following teams/people will review the schedule & appraisal log:

- Agency Services
- Appraisal Panel – this panel is made up of a range of staff across QSA outside of Government Recordkeeping
- Manager Agency Services
- Director Government Recordkeeping
- State Archivist

Formal submission to State Archivist

Once the schedule and appraisal log has gone through the internal review process, we will then ask you to formally submit the schedule and appraisal log for approval by the State Archivist.

The schedule and appraisal log must be formally submitted by your agency's Chief Executive Officer (CEO) or authorised delegate via email to rkqueries@archives.qld.gov.au.

We will also ask you if you would like the schedule and appraisal log to be available on the QSA website.

More Information

For more information on developing and review a retention and disposal schedule, visit the [recordkeeping section](#) on the Queensland Government (For Government) website, or contact us on (07) 3037 6630 or rkqueries@archives.qld.gov.au.