



# Recordkeeping Reminders

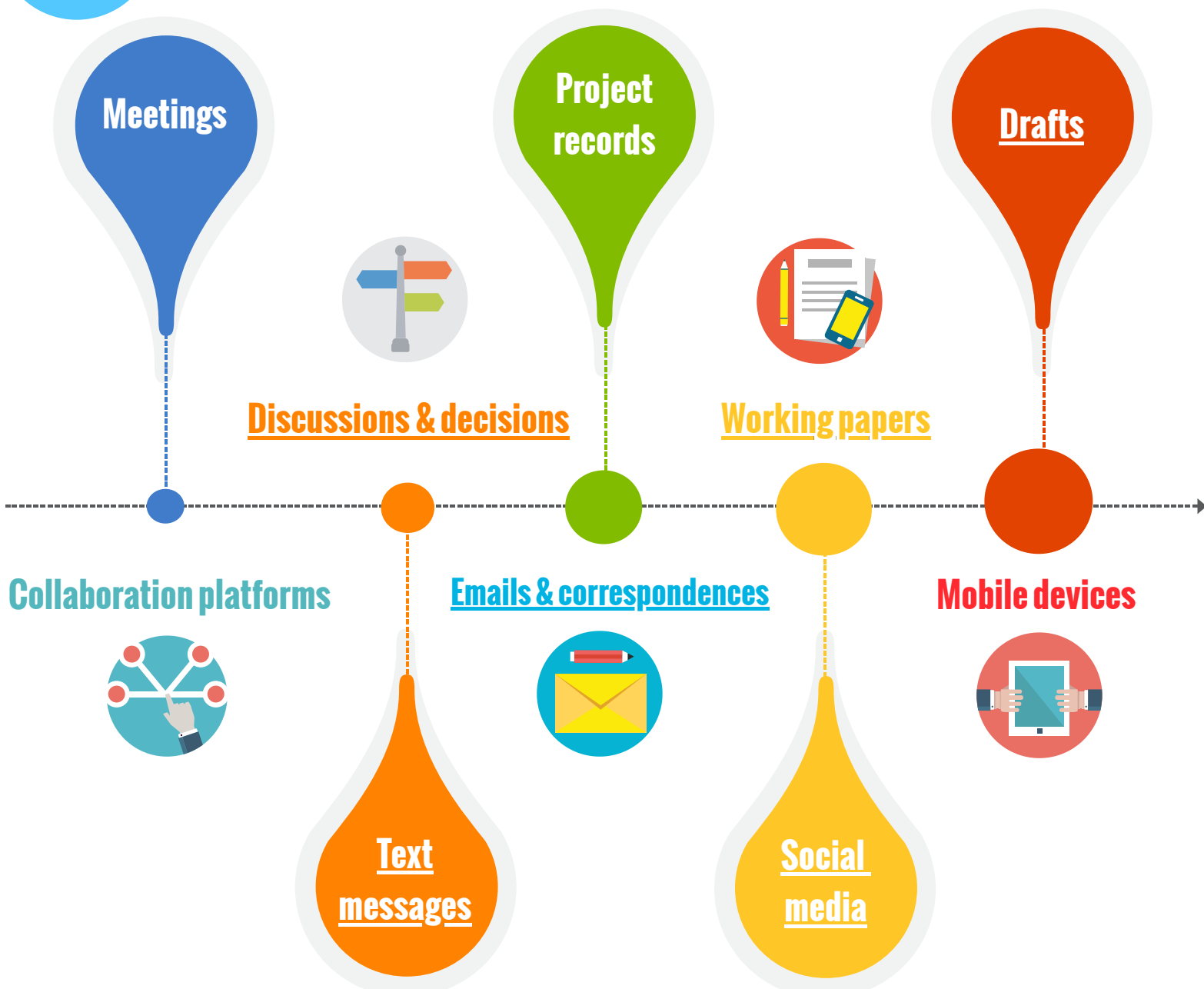
For Non-Government Organisations

You and your organisation need reliable information and records to operate effectively. Most organisations have business and recordkeeping systems which automatically create, capture and store records as part of standard business processes. However, there are situations where this does not automatically occur.

This leaflet outlines some common situations records should be made and saved into your organisation's recordkeeping system.



## Common situations





# Common situations



## Emails & correspondences

Manage emails and correspondence you send and receive according to your organisation's policies and procedures. Save emails and correspondences relating to business matters within your organisation's recordkeeping or business system.



## Social media\*

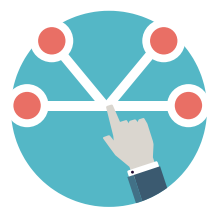
Social media posted on behalf of the organisation, including reactions to posts, comments, tweets, etc. are business records. To assess whether you need to save these records into recordkeeping systems, consider:

- ★ Do clients, stakeholders or the wider community rely on advice or information you post to social media to inform their actions or decisions?
- ★ Does your post communicate decisions & commit the organisation to an action?
- ★ Does your post seek feedback regarding agency-wide issues on governance, policies and procedures?
- ★ Will you need to prove what you posted?



## Messages\*

Text and multimedia messages sent and received in the course of official business could be required as evidence of the organisations actions and decisions. This includes, WhatsApp, Viber, WeChat, Facebook messenger ect.



## Collaboration platforms

Your organisation may be using collaborative platforms or digital work spaces to communicate, develop joint policies and guidance, and for a range of other processes. Make sure that the recordkeeping responsibilities of these activities are identified and adhered to. Save key drafts, finalised documents and communications into your organisation's business or recordkeeping system.

\*Various messaging and social media applications have functionality to download/extract content which enables you to save the content into your organisation recordkeeping systems. Alternatively, take a screen shot and save it.



## Mobile devices

Transfer, copy and/or sync records and information saved in mobile devices into your organisation's systems and/or repositories to ensure currency of records stored.



## Meetings

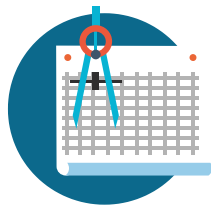
Make sure someone has been delegated to make a record of the meeting. Document the time, date & place of meeting, agenda, decisions, advice or information provided or communicated, supporting documentation and actions to be taken. Record any dissent or issues raised by participants. Circulate and confirm the accuracy of the minutes of the meeting.



## Discussions & decisions (face to face & via phone)

Make a record of business you conduct or decisions that you make face to face or via telephone. This can include:

- ★ providing advice, instructions or recommendations
- ★ giving permissions and consent, and
- ★ making decisions, commitments or agreements, including reasons for decisions or recommendations.



## Project records

Ensure that records relating to projects that you have been assigned to or tasked with, are created and saved into your organisation's recordkeeping or business systems. This will ensure that project information and its delivery are available to others in the organisation.



## Working papers

Working papers are those papers and notes which are used to prepare or complete other records. Save working papers that document significant decisions, discussions, reasons and actions or contain significant information that is not contained in the final version of the record.



## Drafts

Save drafts submitted for comment or approval by others and drafts containing significant or substantial changes or annotations. Save drafts relating to the development of high level policies and procedures and proposed amendments.



## Things to consider



### Understand the rules

Understand your organisation's rules around records and information, such as:

- ★ when you need to make records
- ★ how you should title / label them
- ★ where they should be managed
- ★ who should have access to them
- ★ when should they be shared
- ★ whether the information is confidential or sensitive and who they can be shared with and,
- ★ whether they can be publicly available



### Use corporate information systems

By using your organisation's business systems and repositories to save your records and information, you can ensure that the information you rely on is also available to others. Holding information in appropriate business systems allows it to be properly managed, protected and made accessible. Use of standardised organisational processes and templates makes it simpler to document actions, decisions, approvals and outcomes.

## CONTACT US



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