

Title:	2.8 Correspondence Procedures
Previous No:	
File No:	
Statutory Environment:	<i>State Records Act 2000</i>
Minute No:	
Last Updated:	September 2015
Review Date:	September 2019

Objective:

This procedure deals with the recording and archiving of legal and vital documents.

Policy:

Inwards Correspondence

1. Includes documents received by hand, mail, fax, email or over the counter. Everything received by whatever means goes to the designated records officer in the first instance. One email address (designated records officer) is advisable to ensure various staff members are not making decisions on what is or is not important or to be retained.
2. All documents received, except junk mail (to be determined by consultation with relevant senior staff member if records officer is unsure), is stamped in the top right corner showing:
 - date; and
 - file reference/s (main file for circulation, extra references for filing).
3. Record all documents received in the "Mail Register":
 - date received;
 - name of sender;
 - brief descriptor of subject; and
 - file reference/s allocated.
4. Where multiple file references have been used, ensure sufficient photocopies are made, marked and filed to appropriate files.
5. At this point the CEO might like to review all the documents received (in a manila folder) prior to them being placed on files for circulation.

Note

If the CEO alters the file references applied by the records officer, then the Inwards Register needs to be amended.

6. CEO will review the inward mail at the end of each day and:
 - Allocate to various Officers for their attention and action;
 - Refer the correspondence to the Agenda for the next Council Meeting; or
 - If no action is required, item will be placed in the filing tray for Records Officer to file in date order. Where multiple references are indicated, ensure photocopies are made and marked for the extra files.
7. Correspondence items referred to Officers, the relevant officer:
 - If referred for information only, Officer reads the document and returns for filing;
 - If action is performed – letter, phone call, email etc., correspondence is marked and returned for filing with a copy of the action attached.

It is not considered necessary to record in the Inwards Register –

- cheques or money orders as these will be entered in the "Remittances Received by Mail" book;
- receipts;
- creditor accounts (although they should be stamped with the Received date stamp and placed in the daily manilla folder for CEO's end of day review);
- minor items such as library request forms; or
- junk mail (including sale catalogues, advertising brochures, booklets etc).

Outwards Correspondence

1. Includes documents given by hand or over the counter or sent by mail, fax, email. Everything sent by whatever means goes to the records officer for recording. File reference/s applied by officers to outgoing correspondence should be verified by the records officer or CEO to ensure continuity.
2. Record all documents sent in the "Outwards Register":
 - date sent;
 - name of recipient;
 - brief description of subject; and
 - file reference/s allocated
3. Ensure copies of outward documents are filed promptly in date order as much as is practicable, noting the sequential folio number on the top right hand corner of the document.
4. Where multiple file references have been used, ensure sufficient photocopies are made, marked and filed to appropriate files.