

Retention and Disposal Authority Update December 2025 - Summary of changes

Number	Function - Activity - Name	Change summary
05.1.4	FACILITIES & INFRASTRUCTURE - CONSTRUCTION & REFURBISHMENT - Unsuccessful tenders	Deactivated. Moved to 05.2.5
05.2.1	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Acquisition and disposal	Schedule description changes from PROS 25/06 and update to PROV source reference.
05.2.2	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Storage, location management and stocktaking	Schedule title and description changes from PROS 25/06 and update to PROV source reference. Retention increased from 2 to 7 years. Schedule description change to include asset allocation.
05.2.4	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Engagement of suppliers	Deactivated and incorporated into 09.2.1
05.2.5	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Tenders	New class from PROS 25/06. Unsuccessful tenders moved here from 5.1.4 with an increase in retention period from 2 to 7 years.
05.2.6	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Routine enquiries	New class from PROS 25/06
05.2.7	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Delivery of equipment & stores, furniture & furnishings	New class from PROS 25/06
05.2.8	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Maintenance of equipment & stores, furniture & furnishings	New class from PROS 25/06
05.2.9	FACILITIES & INFRASTRUCTURE - EQUIPMENT & SUPPLIES - Instructions for using equipment and stores	New class from PROS 25/06
05.3.1	FACILITIES & INFRASTRUCTURE - FLEET MANAGEMENT - Acquisition and disposal of vehicles	Update to PROV source reference. Change to disposal trigger. Schedule description changes to include leased vehicles.
05.3.2	FACILITIES & INFRASTRUCTURE - FLEET MANAGEMENT - Vehicle usage and maintenance	Schedule description changes from PROS 25/06 and update to PROV source reference. Retention period increased from 2 to 7 years. Change to disposal trigger.
05.3.3	FACILITIES & INFRASTRUCTURE - FLEET MANAGEMENT - Accidents and infringements	Update to PROV source reference. Change to disposal trigger.
05.5.1	FACILITIES & INFRASTRUCTURE - SECURITY - Security administration	Schedule description changes from PROS 25/06. Update to PROV source reference.
05.5.3	FACILITIES & INFRASTRUCTURE - SECURITY - Damage and illegal entry	Schedule description changes from PROS 25/06. Update to PROV source reference.

06.1.1	FINANCIAL MANAGEMENT - ACCOUNTING - Accounting records	Update to PROV source reference. Change to disposal trigger.
06.1.2	FINANCIAL MANAGEMENT - ACCOUNTING - Bank accounts records	Schedule description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger.
06.1.3	FINANCIAL MANAGEMENT - ACCOUNTING - Banking activities records	Update to PROV source reference. Change to disposal trigger.
06.1.4	FINANCIAL MANAGEMENT - ACCOUNTING - Asset register	Schedule description changes from PROS 25/06 and update to PROV source reference. Retention period decreased from permanent to 30 years.
06.1.5	FINANCIAL MANAGEMENT - ACCOUNTING - Asset management	Schedule description changes from PROS 25/06 and update to PROV source reference.
06.1.6	FINANCIAL MANAGEMENT - ACCOUNTING - Records containing cardholder data	Update to PROV source reference.
06.1.7	FINANCIAL MANAGEMENT - ACCOUNTING - Records containing cardholder authentication data	Update to PROV source reference.
06.1.8	FINANCIAL MANAGEMENT - ACCOUNTING - Debt recovery	New class from PROS 25/06
06.1.9	FINANCIAL MANAGEMENT - ACCOUNTING - Incidental benefits	New class from PROS 25/06
06.1.10	FINANCIAL MANAGEMENT - ACCOUNTING - Chart of accounts	New class from PROS 25/06
06.2.1	FINANCIAL MANAGEMENT - AUDITING - Auditing	Schedule title and description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger. Retention decreased from 10 to 7 years. Incorporates 06.2.2 and 06.2.3 to cover all financial auditing activities.
06.2.2	FINANCIAL MANAGEMENT - AUDITING - Routine audit reports	Deactivated and incorporated into 06.2.1
06.2.3	FINANCIAL MANAGEMENT - AUDITING - Audit working papers	Deactivated and incorporated into 06.2.1
06.2.4	FINANCIAL MANAGEMENT - AUDITING - Mismanagement and corruption	Schedule title and description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger. Incorporates 06.2.5 to cover all instances of financial mismanagement and corruption.
06.2.5	FINANCIAL MANAGEMENT - AUDITING - Fraud - minor instances	Deactivated and incorporated into 06.2.4
06.3.1	FINANCIAL MANAGEMENT - AUTHORISATION - Approval process	Update to PROV source reference. Change to disposal trigger.

06.4.1	FINANCIAL MANAGEMENT - BUDGETING - Budget estimates	Schedule description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger.
06.4.2	FINANCIAL MANAGEMENT - BUDGETING - Departmental budget estimates	Deactivated and incorporated into 06.4.1
06.5.1	FINANCIAL MANAGEMENT - EXTERNAL FUNDING & GIFTS - Grants, donations, fundraising & sponsorship	Schedule title and description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger.
06.5.2	FINANCIAL MANAGEMENT - EXTERNAL FUNDING & GIFTS - Fundraising records	Deactivated and incorporated into 06.5.1
06.5.3	FINANCIAL MANAGEMENT - EXTERNAL FUNDING & GIFTS - Loan management	New class from PROS 25/06
06.5.4	FINANCIAL MANAGEMENT - EXTERNAL FUNDING & GIFTS - Grant allocation procedures	New class from PROS 25/06
06.5.5	FINANCIAL MANAGEMENT - EXTERNAL FUNDING & GIFTS - Unsuccessful grant applications	New class from PROS 25/06
06.5.6	FINANCIAL MANAGEMENT - EXTERNAL FUNDING & GIFTS - Identifying grant funding opportunities	New class from PROS 25/06
06.6.1	FINANCIAL MANAGEMENT - FINANCIAL REPORTING - Annual financial statements	Retention period decreased from permanent to 7 years.
06.6.2	FINANCIAL MANAGEMENT - FINANCIAL REPORTING - Interim financial statements	Update to PROV source reference. Change to disposal trigger.
06.6.3	FINANCIAL MANAGEMENT - FINANCIAL REPORTING - Working papers	Deactivated and incorporated into 06.6.1 and 06.6.2
06.7.1	FINANCIAL MANAGEMENT - INSURANCE - Insurance policies	Schedule description changes from PROS 25/06 and update to PROV source reference.
06.7.2	FINANCIAL MANAGEMENT - INSURANCE - Insurance claims	Schedule description changes from PROS 25/06 and update to PROV source reference.
06.8.1	FINANCIAL MANAGEMENT - TAXATION - Taxation records	Schedule description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger. Retention period increased from 5 to 7 years.
07.7.6	GOVERNANCE & STRUCTURE - POLICY & PROCEDURES - Financial management procedure manuals etc.	New class from PROS 25/06
09.2.1	HUMAN RESOURCES - CONSULTANTS & CONTRACTORS - Engagement of consultants, suppliers, contractors and honorary & adjunct appointments	Schedule title and description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger.

09.12.3	HUMAN RESOURCES - REMUNERATION - Salaries processing	Schedule description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger.
11.2.1	LEGAL SERVICES - AGREEMENTS - Summary record of contracts & agreements	Update to PROV source reference. Retention period decreased from permanent to 7 years.
11.2.2	LEGAL SERVICES - AGREEMENTS - Contracts & agreements - significant	Schedule description updated to align with PROS 07/01. Update to PROV source reference.
11.2.3	LEGAL SERVICES - AGREEMENTS - Contracts & agreements under seal	Schedule title and description changes from PROS 25/06 and update to PROV source reference. Change to disposal trigger.
11.2.4	LEGAL SERVICES - AGREEMENTS - Contracts & agreements - smaller scale not under seal	Schedule description and disposal trigger updated to align with PROS 07/01. Update to PROV source reference.
11.2.5	LEGAL SERVICES - AGREEMENTS - Contracts & agreements - procurement	New class from PROS 25/06