TAHO
Tasmanian Archive + Heritage Office

ORDA Quick Tips Library

ORDA is a secure, web-based system to manage the drafting and submission of your agency's Retention and Disposal Schedule.

Through ORDA, you can draft or import your disposal schedule, export your disposal schedule in different formats, and search across other approved disposal schedules for existing precedents. The Government Information Strategy Unit (GISU) within the Tasmanian Archive + Heritage Office (TAHO) will review your draft schedule within ORDA and provide comments to guide your development project. Collaboration between you and GISU to develop your disposal schedule, from draft to final approval, is conducted entirely through ORDA.

The ORDA Quick Tips Library is a series of 'how to' documents designed to provide staged instruction to agency staff and representatives responsible for drafting schedules through ORDA.

OQT 5.1 – Searching for precedents

The search facility allows users to search *for* approved disposal schedules (or within approved disposal schedules) for specific precedents. The search fields on the Search Disposal Schedules screen are:

- **RDS Title** = the title of the disposal schedule.
- **Agencies** = the agency/s linked to the disposal schedule.
- **Sector** = the sector assigned
- **RDS Registration No. (for internal users only)** = the disposal schedule registration number
- **Client Name (for internal users only)** = the name of agency editor assigned to one or multiple disposal schedules.

Note that information from disposal schedules that do not have the status "Approved by State Archivist" will <u>not</u> be displayed in results.

A search can be conducted on specific organisations, sectors or disposal schedules as well on terms/classes across approved schedules. Searching can also be conducted by using a combination of search fields.

Keyword = this allows searching across all approved disposal schedules for matching keywords in term/class titles, descriptions, or both. The default setting is to search across term/class titles and descriptions.

The search fields can be used in isolation, e.g. search across all approved disposal schedules on the keyword "client".

Alternatively, search fields can be used in combination to filter results, e.g. search on the keyword "client" in combination with a specific sector or agency. Matching results are displayed in table form:

RDS No.	RDS Title	Agency	Term / Class	
TEST01	Testing UAT5 fixes - DHHS - Client Health Records	Department Of Health And Human Services	Class	More info
TEST01	Testing UAT5 fixes - DHHS - Client Health Records	Department Of Health And Human Services	Client records (Patient Travel Assistance Scheme)	More info
TEST01	Testing UAT5 fixes - DHHS - Client Health Records	Department Of Health And Human Services	Client Records (Screening Programs)	More info
TEST01	Testing UAT5 fixes - DHHS - Client Health Records	Department Of Health And Human Services	Client records (Inherited Diseases)	More info
TEST01	Testing UAT5 fixes - DHHS - Client Health	Department Of Health And Human Services	Class	More info

Search results are presented in several ways:

- You can view the whole disposal schedule in which a matching result has been found by clicking on the link in the "RDS Title" column.

- You can view the specific matching result within the disposal schedule by clicking on the link in the "Term/Class" column.

- You can view a snapshot of the matching result within the disposal schedule by clicking on the link in the "More info" column.

Client files.

Records may include;

- Application for Assistance Form
- Finance records
- Correspondence
- Reports
- Supporting documentation
- Purchase orders & requisitions

Disposal

Disposal Action: Destroy
Disposal Custody: Destroy 7 years after action completed.

Title	Agency	Term / Class	
ng UAT5 fixes - - Client Health rds	Department Of Health And Human Services	Class	More info

You can view a consolidated report of matching results by clicking on the "Report" button.

RDS No.	RDS Title	Agency	Term / Class	
TEST01	Testing UAT5 fixes - DHHS - Client Health Records	Department Of Health And Human Services	Class	More info
TEST01	Testing UAT5 fixes - DHHS - Client Health Records	Department Of Health And Human Services	Client records (Patient Travel Assistance Scheme)	More info
TEST01	Testing UAT5 fixes -	Department Of Health	Client Records (Screening	More info

In this last example, you can also export the report in different formats such as a spread sheet by clicking on the icon and choosing your preferred format.

This is a recommended option when there is a large number of matching results as the data can then be analysed and refined further via the spread sheet:

Online Retention & Disposal Application
RDS Data Report
Report Date   01/12/2014

RDS Number	Approval Date	Agency	RDS Title	Sector	Ref.	Term Title	Term Description	Class Title	Class Description	Retention Period	Retention Unit	Disposal Trigger	Disposal Action	Archive Justification	Justification Description	Restricted Access Justification	Restricted Access Description
TEST02	24/11/2014	Department Of Health And Human Services	Testing UATS fixes - DHHS - Oral Health Records	Health Care		ORAL HEALTH RECORDS	Oral Health Services Tasmania (OHST) provides dental treatment to eligible Tasmanian adults who are on either a Healthcare card or a Pension card. OHST also provides dental treatment to all Tasmanian children until they attain the age of 18 years.										
TEST02	24/11/2014	Department Of Health And Human Services	Testing UATS fixes - DHHS - Oral Health Records	Health Care		Dental Records	A dental health record (electronic or manual) is an official record of all treatment planned and/or completed and will include all patient related communications that occur in the dental clinic. This dental record provides continuity of care for the patient within Oral Health Services Tasmania (OHST).	Client Record	Records may include: • Treatment details • Consents • Dental health status • Medical history • clinical referrals • test results • imaging records	7	years	last attendance provided patient has reached 25 years of age	Destroy				
TEST02	24/11/2014	Department Of Health And Human Services	Testing UATS fixes - DHHS - Oral Health Records	Health Care		Dental Records	A dental health record (electronic or manual) is an official record of all treatment planned and/or completed and will include all patient related communications that occur in the dental clinic. This dental record provides continuity of care for the patient within Oral Health Services Tasmania (OHST).	Appointment records	Records may include: • Appointment books • recall letters • failure to attend and change of appointment letters • appointment SMS reminders	2	years	action completed	Destroy				

If a search produces no matching results, the user will receive a statement advising of this:

Search Retention & Disposal Schedules

RDS Title

Agencies

Sector

RDS Registration No.

Client Name

Search for a Precedent

Keyword   pizza

Search In   Term/Class Title And Description

[Search] [Clear] [Report]

The search returned no results.

Over time, as disposal schedules are added to the system, a greater number of search results will be available. Only once the system contains all approved disposal schedules will there be a comprehensive body of information available for searching.

Related TAHO Resources:

Appraisal Statement for State records required as State Archives

Guideline 2 Retention and disposal of State records

Guideline 4 Agency determination of access restrictions

Guideline 6 Developing a functional records disposal schedule

Advice 2 All about appraisal

Advice 13 Writing disposal classes

Advice 28 Getting started on the development of an agency functional disposal schedule

Information is available via the GISU website on relevant training programs recommended for agencies undertaking Retention + Disposal Schedule development projects.

Contact us:

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Information Security Classification

This document has been security classified using the Tasmanian Government Information Security classification standard as PUBLIC and will be managed according to the requirements of the Tasmanian Government Information Security Policy.

Document Development History
Build Status

Version	Date	Author	Reason	Sections
2.0	August 2015	Sam Foster-Davies	Review	Introduction; Resources; Contact Us
1.0	December 2014	Sam Foster-Davies	Initial Release	All

Amendments in this Release

Section Title	Section Number	Amendment Summary
Contact Us; Introduction		Updated Unit name and email address
Resources		Removed hyperlinks and updated to reflect revised tools

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State Archivist