

Records of verbal communications

Recordkeeping fact sheet 5

Verbal communications

Verbal communication is the use of the spoken word as the means of sending and receiving information e.g. talking face-to-face to an individual or group, on the telephone or via a video link.

Keeping records of verbal communications

Verbal communications, if they concern departmental business, must be captured as records in the corporate recordkeeping system. Below are some examples of verbal exchanges that should be recorded:

- Meetings at which decisions are made but meeting minutes or notes are not taken e.g. an informal team meeting, or a meeting called at short notice to resolve an immediate problem.
- One on one meetings where information is provided, advice is given or a future course of action is decided.
- Telephone calls giving advice, guidance or a commitment to take action e.g. noting or responding to a complaint, giving direction to staff.
- Voice mail messages e.g. requests for information or referrals from other staff involving business matters.

How to record verbal communications

Make a record as soon as possible, preferably on the day the exchange took place. This is crucial as details may become less clear and be subject to dispute if there is a delay.

Record the following details:

- **Date** of the conversation, meeting, or phone call.
- **Record date** – if the record is made on a day after the communication took place.

- **Participants** – names and positions (if known) of people involved in the communication and (if applicable) organisation name/s.
- **Subject** – summarise the main points of discussion including any decisions, agreements, commitments or directions and identify the person/s responsible for any actions arising.
- **Your name and position** as the person making the record.

Store the record in the department's recordkeeping system e.g. save a file note in a TRIM registered file or an authorised corporate system.

Send an email, either confirming the subject and outcome of a meeting, conversation, phone call or other verbal communication, advising others of what has occurred.

How long should records of verbal communications be kept?

The retention period will vary according to the subject of the discussion or meeting. Files and folders will be retained in accordance with requirements specified in the relevant Retention & Disposal Authority.

Further information

For further assistance, please contact the:

Records Service Centre: 9096 8999
Email: RecordsService.Centre@dhs.vic.gov.au

or your local Records Management unit:

East Division Records Unit: 9843 6090
North Division Records Unit: 9412 5427
South Division Records Unit: 8765 7164
West Division Records Unit: 5333 6088

To receive this publication in an accessible format phone 9096 8999, using the National Relay Service 13 36 77 if required, or email RecordsService.Centre@dhs.vic.gov.au