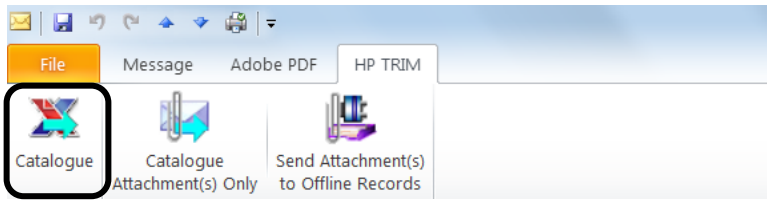
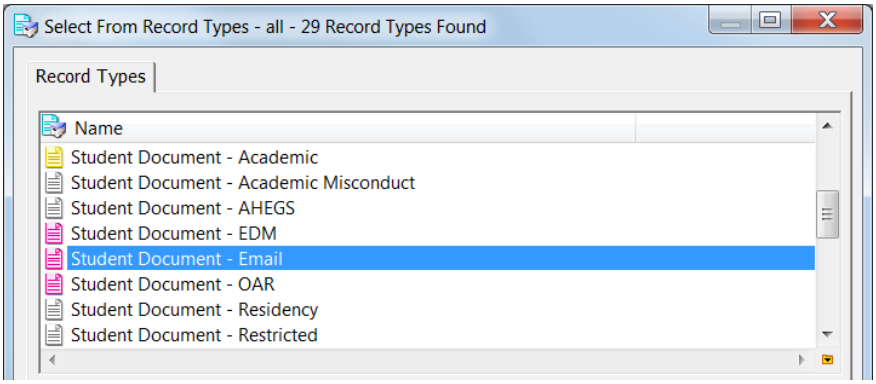
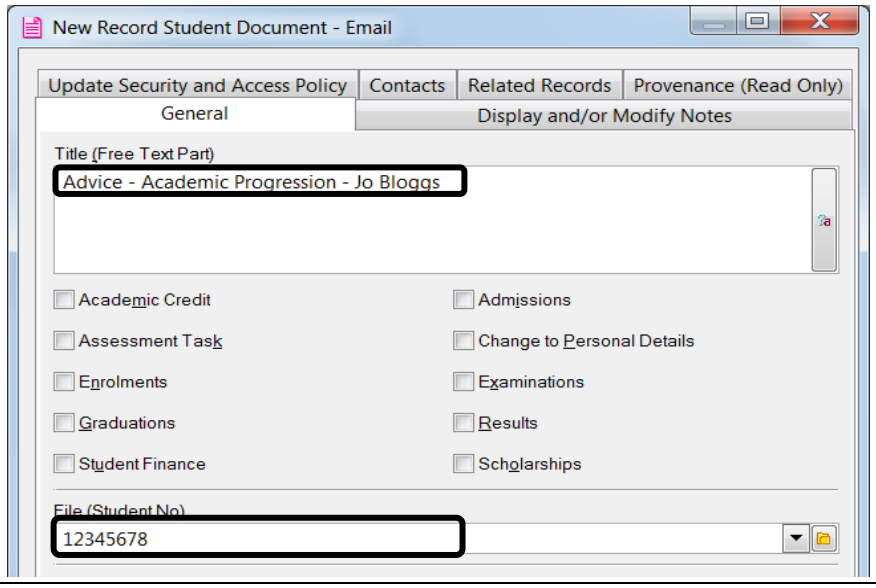
WESTERN SYDNEY
UNIVERSITY

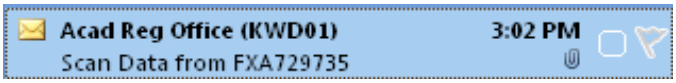
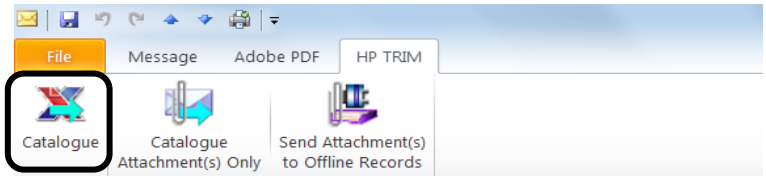
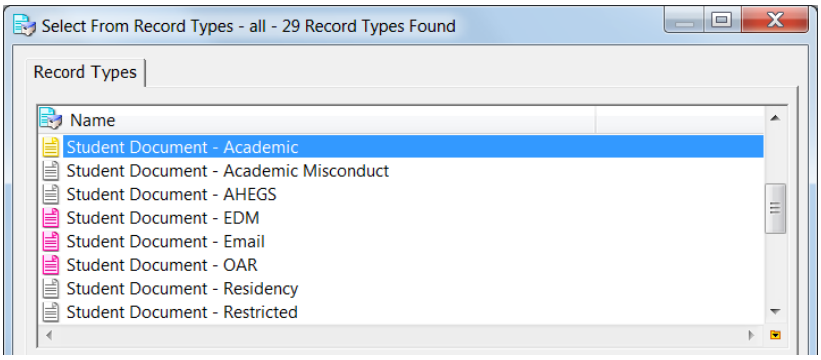
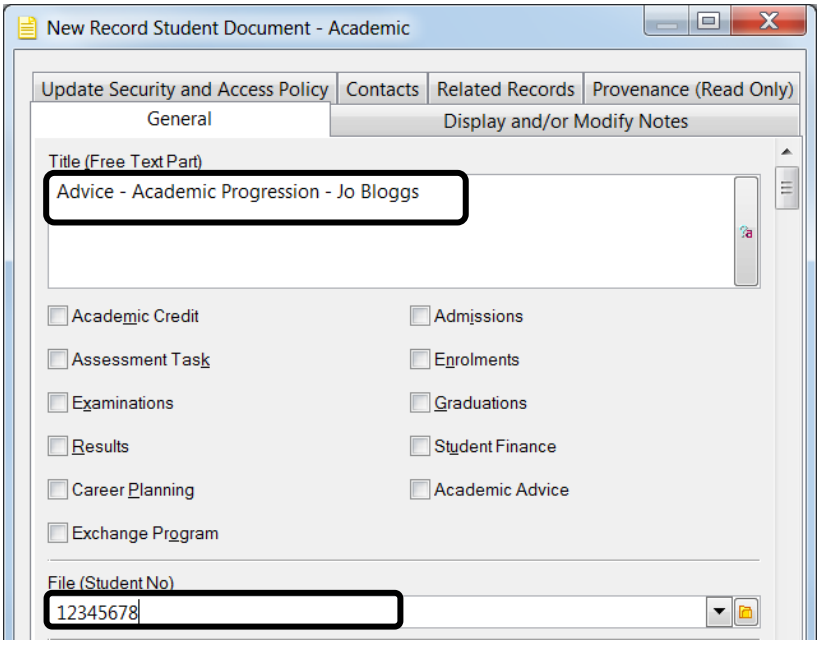
Quick Guide to TRIM – Students Records
University Student Document Recordkeeping

Saving an Email to TRIM Manually

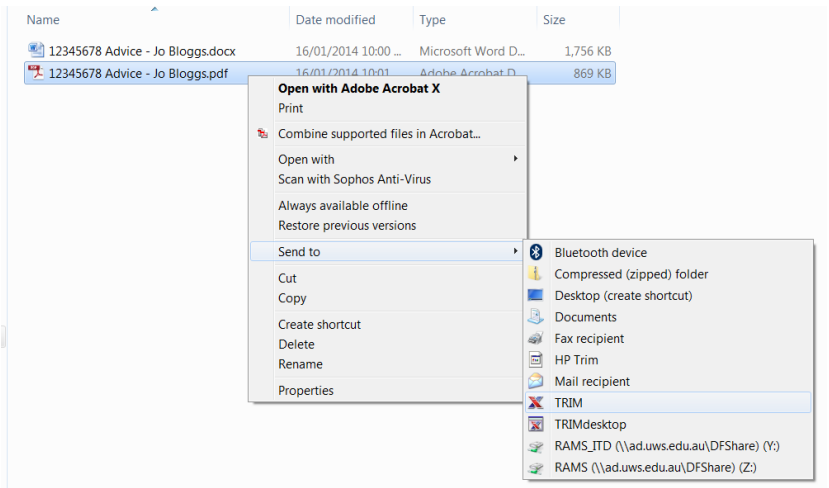
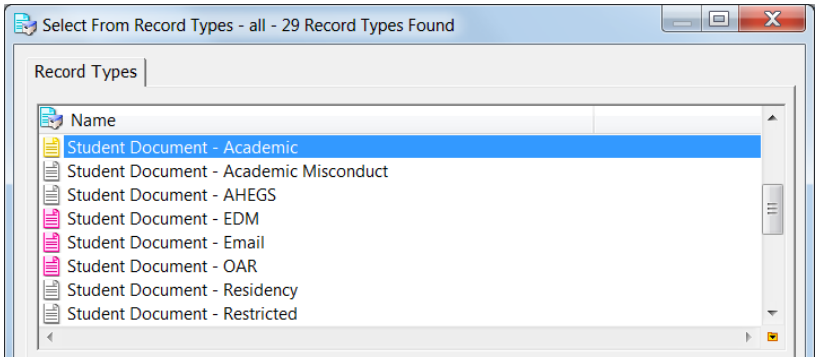
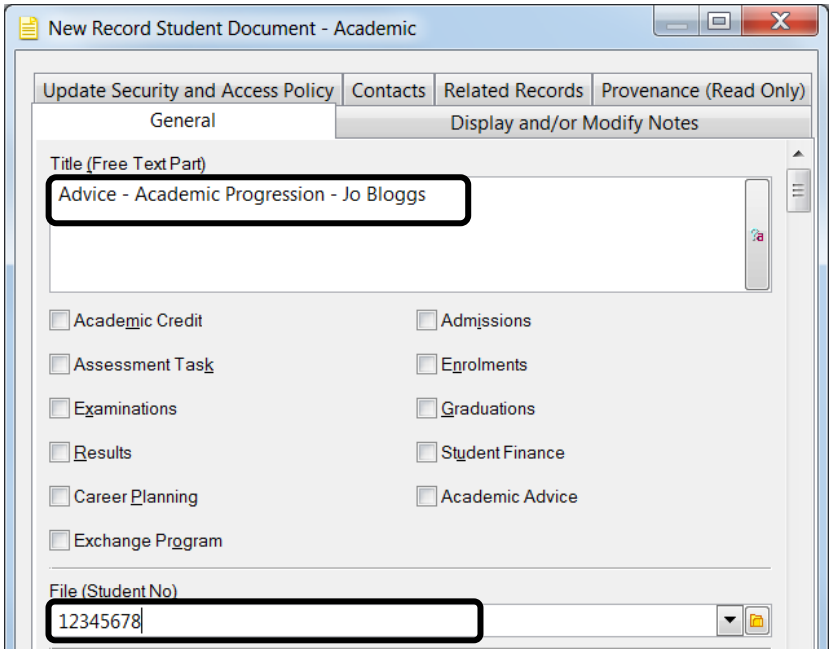
Open the email Click the **Catalogue** button in the *HP TRIM tab* on the toolbar	 No TRIM catalogue button? Contact your TRIM Administrator on x7266
Select the record type: *Student Document - Email* **Note**: If your email contains sensitive information you will need to save it under *Student Document – Restricted* (see page 4).	
Type a meaningful title in the *Title (Free Text Part)* field Enter the student ID in the *File (Student No)* field Click *OK* **Note**: The title is critical to ensuring that, when searching TRIM, you or a colleague will recognise its content at a glance.	

Scanning a hard copy document to TRIM

- Please note, if you have a large amount of hard copy documents you need scanned onto different students' TRIM files, contact EDM centre for advice. edm@lists.uws.edu.au

Use your office photocopier to scan and email a copy of the document to your inbox Open the email	
Click the ***Catalogue Attachment(s) Only*** button	
Select the appropriate record type	
Type a meaningful title in the ***Title (Free Text Part)*** field Enter the student ID in the ***File (Student No)*** field Click ***OK*** **Note**: The title is critical to ensuring that, when searching TRIM, you or a colleague will recognise its content at a glance.	

Saving an electronic document to a student TRIM file

Locate the file on your network drive or desktop Right click Select: **Send To > TRIM**	
Select the appropriate record type	
Type a meaningful title in the *Title (Free Text Part)* field Enter the student ID in the *File (Student No)* field Click *OK* **Note**: The title is critical to ensuring that, when searching TRIM, you or a colleague will recognise its content at a glance.	

What not to place onto a student TRIM file

Tax File Numbers

Tax File Numbers (TFN) should not be placed onto TRIM under any circumstances.

Photo Identification, Citizenship papers and Birth/Marriage/Divorce Certificates

Photo ID, Citizenship papers or Birth/Marriage/Divorce certificates must not be placed onto TRIM unless done so by the EDM team under the (very restricted) 'Student Document – Residency' record type.

General academic material

Academic advice belongs on student TRIM files however general academic material does not. E.g. an email to students in a tutorial informing them of a room change does not need to be saved onto a student's TRIM file, however an email informing a student that their request for an extension on an assignment has been approved, does.

Callista reports

As the information in a Callista report is available on Callista, it does not need to be saved onto a student's TRIM file. The only circumstance where it can be saved to TRIM is if it has been marked with important information which has affected the decision making process related to an issue.

Complaints

The Complaints Unit have case files saved elsewhere in TRIM. Files relating to complaints should therefore not be placed onto a student's TRIM file. Refer to the complaints procedure for more information.

Counselling Records

Counselling records have case files saved elsewhere in TRIM. Files relating to counselling therefore do not belong on a student's TRIM file. Refer to the Counselling Unit for further information.

Academic Misconduct Documents

With the exception of the outcome letter and summary report all records relating to misconduct should be placed on a separate misconduct case file in TRIM. Please refer to misconduct procedures for information on where to save misconduct related emails and documents.

Misconduct (Non-Academic)

Records relating to an individual non-academic misconduct incident.
All information regarding Non Academic misconduct is to be forwarded to the Student Misconduct & Right to Information officer in Secretariat

Sensitive Documents

The *Student Document – Restricted* record type has been set up to comply with legal requirements under privacy legislation to ensure privacy to students who disclose information of a sensitive nature to the University. Sensitive information is disclosed for a variety of administrative processes such as applying for special consideration or for withdrawal from units after census date. Forms, correspondence and other documentation that contain sensitive material such as medical reports, doctor's certificates, counselling and police reports need to be saved under this record type.

When a document is saved as a restricted record type, the metadata (basic information about the document) will be visible to all staff, however only relevant ARO units, Legal, Complaints, Records and Archive Management Services, the Academic Misconduct Group and the Student Records Group will be able to view the contents.

On some occasions additional privacy measures may need to be taken. If you are concerned that any student documentation may require additional security please contact EDM at edm@lists.uws.edu.au.

Record types

Student Document – Email

Used by the mail integration software to save a copy of an email onto a student's TRIM file when sending to an official student email account and copying in trim@westernsydney.edu.au. University staff also has the option of copying in trim@westernsydney.edu.au when corresponding with colleagues and students. This function must be used with good judgement and requires the student email address to be in either the TO or CC fields (not BCC). Please ensure content in the email trail relates to a student's studies and attendance at Western Sydney University, as anything that is placed onto a student's file can be requested to be accessed by that student via GIPA (Government Information (Public Access) Act – formerly Freedom Of Information (FOI)).

Student Document – Restricted

Used when placing documents with sensitive information onto TRIM. This may include but not limited to medical reports, doctors certificates, counselling and police reports etc. (Please note that due to the restrictions on this record type, only a limited number of University staff members are able to view the contents of a restricted document once it has been saved to TRIM). For further details regarding the use of the Student Document – Restricted record type please see above under the Sensitive Documents section.

Student Document – OAR

Used by the Academic Registrar's Office (ARO) staff when saving administrative documents to a student's TRIM file, including but not limited to: Cross

Institutional Studies, Completion Letters, Student Advice, Change of Grade Approvals.

Student Document – Academic Misconduct
Used when dealing with misconduct to record the summary of the alleged misconduct to the student's TRIM file. Please refer to the procedures on dealing with misconduct cases before placing any misconduct documents onto TRIM.

Student Document – Academic
Used by International and School staff when saving academic administrative documents to a student's TRIM file, including but not limited to: student advice, notifications of awards and prizes, peer mentoring.

Student Document – EDM
Used by the EDM scanning software to bulk scan hard copy documents onto TRIM.

Student Document – Notes
Used to add notes to maintain a record of the flow of paperwork and record information regarding enquiries and decisions made about an issue.

Student Document – Residency
Used by a small ARO group who deal with residency issues. (Please note that due to the restrictions on this record type only a limited number of University staff members are able to view the contents of a residency document once it has been saved to TRIM).

University Document
Used for any document that is not a student document i.e. University administrative documents. These documents are usually saved into unit, school or administrative files/folders rather than student files. The security settings of Administrative documents are set to default to that of the file/folder that the document is being saved into.

Retention Periods
All documents have a retention period that the University abides by in an effort to maintain responsible record keeping. To ensure that all documentation you are placing onto TRIM is held for the appropriate amount of time, please refer to the Records and Archives Management Services team.

Support for student file record keeping:

EDM (Electronic Document Management) Centre
edm@lists.westernsydney.edu.au

RAMS (Records and Archives Management Services)
rams@westernsydney.edu.au