

C J REAL ESTATE – Privacy & Compliance Handbook

Table of Contents

- WORKSHOP-HANDBOOK-OPERATIONAL.docx
- PM-WORKBOOK-OPERATIONAL.docx
- SALES-WORKBOOK-OPERATIONAL.docx
- FORMS-PACKAGE-OPERATIONAL.docx
- EMAIL-SIGNATURES-OPERATIONAL.docx
- INTERNAL-PROCEDURES-OPERATIONAL.docx

WORKSHOP-HANDBOOK-OPERATIONAL.docx

Workshop Overview

C J REAL ESTATE – Privacy Compliance Training

OAIC unannounced audits commenced in 2025.

This handbook provides practical procedures for staff in sales and property management.

Key OAIC Requirements

- Privacy Policy must be displayed on website and in office.
- Privacy notices must appear on ALL forms.
- Data must be stored ONLY in Agentbox (sales) or Property Tree (PM).
- Evidence required: training, audits, retention logs.

Collection Rules

- Collect only necessary information.
- Do not collect ID at open homes.
- Provide APP5 privacy notice for enquiries, applications, inspections.
- No personal email, USB or device storage.

Storage Requirements

- Sales → Agentbox only.
- Tenancy → Property Tree only.
- Locked filing cabinet for paper.
- MFA, strong passwords, restricted access roles.

Disclosure Rules

- Disclose only for intended purpose: tenancy, repairs, sales.
- Only to approved trades, strata, insurers, landlords.
- Keep a record if disclosure is unusual.

Retention & Destruction

- Sales files: 7 years.
- Tenancy files: 7 years.
- Unsuccessful applications: 6 months.
- Secure shredding or IT deletion.

Staff Responsibilities

- Use correct forms with privacy notices.
- Store information in correct system only.
- Report issues to Privacy Officer immediately.

Contact

Privacy Officer – C J REAL ESTATE
info@cjintl.com.au | 02 9739 6000

PM-WORKBOOK-OPERATIONAL.docx

Property Management – Operational Workbook
C J REAL ESTATE – Property Tree Procedures
Medium-length operational guide for PM staff.

Data Collection Points

- Rental Applications: ID, income, references (only what is needed).
- Maintenance Requests: contact details + issue description.
- Inspections: condition notes + photos.
- Communications: emails, messages stored in Property Tree.

Correct Storage Rules

- All PM data must go into Property Tree.
- No saving to desktop, USB, or personal email.
- Paper items stored in locked cabinet.

Daily PM Procedures

- Enter new applications on same day.
- Upload payslip only (not full bank statements).
- Attach maintenance photos to job ticket.
- Record all tenancy actions in notes.

Disclosure Rules

- Provide only necessary details to trades.
- Do not send full tenant files.
- Verify landlord identity before sending documents.

Retention & Destruction

- Unsuccessful applications: delete after 6 months.
- Tenancy files: retain 7 years after end.
- Destroy by shred bin or IT deletion.

SALES-WORKBOOK-OPERATIONAL.docx

Sales Team – Operational Workbook
C J REAL ESTATE – Agentbox Procedures

Medium-length operational guide for Sales staff.

Open Home Rules

- Collect: name + phone only.
- Do NOT collect ID.
- Enter leads into Agentbox same day.

Enquiry Management

- Store all enquiries in Agentbox.
- Use tags for interest level.
- Do not export data unless approved.

Vendor Communication

- Provide prequalified buyer lists only.
- Avoid sharing all contacts.
- Log disclosures in Agentbox.

Storage Requirements

- Sales → Agentbox only.
- No personal device storage.
- Use confidentiality watermark for exports.

Retention

- Sales campaign files kept 7 years.
- General enquiries deleted when no longer needed.

FORMS-PACKAGE-OPERATIONAL.docx

Forms Package – Operational Version

C J REAL ESTATE – Operational Privacy Forms

Includes full working forms used in leasing, sales, inspections and compliance.

Tenancy Application Privacy Notice

**** PRIVACY NOTICE – TENANCY APPLICATION ****

We collect your personal information to assess your tenancy application, manage any approved tenancy,

and comply with NSW Fair Trading requirements.

Your information may be shared with the landlord, referees, trades, insurers, and TICA/National Tenancy Database.

We store data securely in Property Tree.

If you do not provide required information, we cannot process your application.

Privacy Officer: info@cjintl.com.au | 02 9739 6000

Landlord Authority Privacy Clause

We collect your information to provide property management services and comply with legal obligations.

Data is stored securely in Property Tree and disclosed only to tenants, trades, insurers, and strata as required.

Retention: 7 years after end of management.

Open Home Register (Sales)

Name: _____ Phone: _____ Email (optional)

We collect this information to follow up your enquiry and for inspection safety.

We store this data in Agentbox. Buyer details are only provided to the vendor when prequalified.

Records destroyed 1 month after campaign.

Privacy: www.cjrealestate.com.au/privacy

Quarterly Audit Checklist

- Sample 5 files: sales + PM
- Check privacy notice present on forms
- Check correct system used (Agentbox / Property Tree)
- Check retention periods
- Record actions and corrective steps

EMAIL-SIGNATURES-OPERATIONAL.docx

Email Signature Guide – Operational

C J REAL ESTATE – Email Standards

All staff must use approved signatures with confidentiality notice.

Standard Signature

[Name]

C J REAL ESTATE

Shop 5, Walker St, Rhodes NSW 2138

Phone: 02 9739 6000 | Email: info@cjintl.com.au

www.cjrealestate.com.au

This email may contain confidential information protected by our Privacy Policy:

www.cjrealestate.com.au/privacy

PM Signature

[Name], Property Manager

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Data stored securely in Property Tree.

Sales Signature

[Name], Sales Executive

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Client data managed securely in Agentbox.

INTERNAL-PROCEDURES-OPERATIONAL.docx

Internal Privacy Procedures – Operational Version

C J REAL ESTATE – Step-by-step procedures governing collection, storage, disclosure and destruction of personal information.

Collection

- Collect only what is necessary for leasing or sales.
- Provide privacy notice at every collection point.
- No ID collection at open homes.
- No over-collection (e.g., full bank statements).

Storage

- Sales → Agentbox only.
- PM → Property Tree only.
- Paper → Locked cabinet.
- No personal device storage allowed.

Disclosure

- Only for original purpose (tenancy, repairs, sales).
- Only to approved trades, strata, insurers.
- Record unusual disclosures.

Retention

- Unsuccessful applications: 6 months.
- Tenancy & sales files: 7 years.
- Destroy securely (shredding / IT deletion).

Access & Complaints

- Verify identity before releasing information.
- Log all requests.
- Respond within 30 days.

- Escalate unresolved matters to OAIC.