Transitory Records

Avoid maintaining transitory records longer than necessary. Review your files regularly and destroy any transitory records (whether whole files or parts thereof), which are not official University records.

University records provide evidence of a policy, decision or obligation and should be filed and saved.

Transitory records have no ongoing operational, informational, evidential or historical value and can be destroyed as soon as you are finished with them. Transitory records can come in many formats, including paper, e-mail, electronic documents, databases, voicemail, etc.

What You Can Destroy

The following records are generally considered transitory:

- Notices of meetings, special events, holidays, acceptances or regrets.
- Routine memos and mass communications to staff, where you are *not* the author of the memo.
- Exact copies of master documents whose originals are filed elsewhere (ex: meeting minutes, discussion papers, etc.)
- Drafts that do not reflect significant steps in the preparation of a final document or record decisions.
- Working papers where the results have been written into an official document and are not required to support it.
- Convenience or duplicate copies.
- "CC" copies that require no action.
- FYI copies kept for convenient reference or information and not annotated or changed in any way.
- Printouts or extracts from databases.
- Minutes and agendas received from other parts of the university or external groups which require no action.
- Messages where the information has no operational value (for example, personal or routine scheduling messages).
- Superseded address lists, distributions lists, membership lists, etc.
- Publications from outside your office, such as reports, catalogues, brochures or reference materials.
- Blank forms.

When to Destroy

In general, you can destroy transitory records when they no longer serve their primary purpose. For example,

- Destroy notices once the event has taken place (if you are not the author).
- Destroy drafts once the final version is issued.
- Destroy FYI files when no longer referenced.
- Destroy "cc" copies when the issue is resolved or concluded.

Why Destroy?

Keeping transitory records "just in case" poses several problems:

- Your filing cabinets, computers, and e-mail inboxes will be quickly stuffed.
- Retention and disposition practices will be complicated and time consuming, as you will have to sift through transitory records in order to locate important university records.
- In cases where another office is responsible for the record, you can always access it through them or the University Archives, if necessary.

Exceptions

Pay close attention when destroying transitory records and exercise good judgment. For example, the following documents may need to be retained longer:

- Drafts and working papers of legal documents or records relating to negotiations, in order to see how the final agreement was reached.
- Versions of reports or policies that show major changes.
- A telephone message slip or other evidence of contact that may be needed in the future.

Segregating Transitory Records

Avoid mixing files containing transitory records with official University records. For example:

- Keep copies of committee minutes (for which you are not responsible) separate from the records for which you are the office of primary origin.
- Keep working files and general information files separate from official university records for which you are responsible.
- Do not file transitory emails in folders intended for long-term retention.

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