



Records Management Tip Sheet

Transitory Records

What is a Transitory Record?

Records created or received that are **temporarily** useful. These records will have no further value beyond:



- ⇒ Completing a simple transaction
- ⇒ Using to prepare a University Record
- ⇒ Acting as a convenient reference copy for an office or individual that does not have primary responsibility for that record

Common Transitory Records:

- | | | |
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| <input checked="" type="checkbox"/> Personal emails and messages | <input checked="" type="checkbox"/> Forms used to complete another record (example: information on form used to make a database entry) | <input checked="" type="checkbox"/> Superseded lists (telephone, distribution) and manuals (printers, scanners) |
| <input checked="" type="checkbox"/> Blank forms, letterhead, or other stationary | <input checked="" type="checkbox"/> Advertising materials, Listserv emails, magazines, and other publications from outside your office | <input checked="" type="checkbox"/> **Drafts, notes, or working materials used to prepare a final document (report, policy, calendar, memo, video, etc.) |
| <input checked="" type="checkbox"/> FYI, BCC, or CC messages that require no action. | <input checked="" type="checkbox"/> Duplicate copies created for quick reference or handouts | <input checked="" type="checkbox"/> General announcements or notifications of meetings, special events, holidays, acceptances or regrets |

REMINDER!

It's good practice to do **regular reviews** of your work space for Transitory Records that are not needed.



**Use your professional judgement! Drafts of legal documents, investigation notes, or draft records with annotations/comments that document the development of significant processes, policies, or decisions may need to be managed like a University record. Not certain? Contact the Records Manager for guidance.

How do I dispose of Transitory Records?

Once the Transitory Record is no longer required to complete your work, please take care to **delete, recycle, or shred**. You do not need permission nor do you need to complete any forms.

Warning!

1. Any paper Transitory Records containing personal information should be destroyed by **secure shredding**. Never put records containing personal information into desk side blue bins.
2. Transitory Records are still subject to **legal discovery** and requests made under the **Freedom of Information and Protection of Privacy Act**. You may be forbidden from disposing of Transitory Records in these circumstances.

Questions?

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