MANAGING TRANSITORY RECORDS [I.E., RECORDS YOU DON’T NEED TO KEEP]

Ongoing destruction or deletion of transitory records is key to managing information effectively, improves efficiency and reduces records-related costs. It should be part of everyone’s normal administrative practices. The following DOs and DON’Ts will help you decide what to keep and what you can safely discard. If in doubt whether a record is transitory or official, keep it and get advice from the University Records Manager.

✔️ DO know the difference between transitory and official records
  - Official records give evidence of the university’s actions, transactions, decisions and policies. These records have ongoing value and need to be kept for a specified period of time for legal, financial, operational, historical or other official requirements. University records include minutes, correspondence (including e-mail), policies, contracts, source financial documents, reports, newsletters, photographs, maps, plans, and data in databases.
  - Transitory records are records of temporary value, such as working documents, drafts, copies and reference materials. As a general rule, they need to be kept only as long as needed for current work.

✔️ DO exercise judgment on what transitory records need to be kept and for how long
  - Clearly identify draft items and discard once the final version is complete.
  - Discard working documents (paper and electronic), such as supporting materials used in the preparation of final documents, copies and reference materials, once you are sure that the final version has been approved and filed.

✔️ DO discard transitory records regularly
  - Dispose of information with short-term value once you have acted on it or no longer need it. Keeping more records than necessary makes it difficult to find important information quickly.
  - Discard stocks of internal publications and routine external publications once they have been circulated and/or you no longer need them.
  - Copies of university records (like minutes) for which you are not responsible should only be kept as long as useful.

❌ DON’T keep copies longer than the official records
  - Example: copies of invoices (i.e. when the originals are forwarded to Finance) must not be kept longer than 7 years, and you are encouraged to discard them sooner if you no longer need them.
  - Copies of records containing sensitive personal information should be securely destroyed as soon as possible. Check WatCLASS for specific retention periods for copies of records with sensitive personal information.

❌ DON’T assume that all drafts, duplicates or copies are transitory
  - Keep significant drafts which form part of negotiations, including draft contracts and other agreements, and versions which show major changes in policy.
  - Keep annotated copies that have been significantly altered. It is sometimes important to retain those records which show what changes were made, why, when and by whom. Example: a student’s academic progress report with a change marked and signed by an advisor.

❌ DON’T destroy transitory records when they are relevant to a FIPPA request or current/forthcoming legal action
  - It is important that transitory records, including those which have been kept when they should have been destroyed, not be destroyed if they are relevant to an active or a reasonably foreseeable FIPPA request or other legal action.
  - Contact the FOIP Coordinator for advice.
**DO clean out your e-mail regularly**

- Delete “cc”, “bcc”, or FYI copies kept only for convenience or information as soon as you are done with them.
- Delete routine e-mails, for example, arranging meetings or events.
- If you are uncomfortable reading and deleting e-mail immediately, save transitory records to a “Temporary” folder or directory. Spend a few minutes each week going through and deleting material you no longer need.

**DO treat electronic records just as you would paper records**

- Keep only the official copy, whether paper or electronic, not both.
- Regularly delete outdated files from shared drives or individual computer work space.

**DON'T create unnecessary transitory records**

- Avoid downloading documents and distributing them as attachments. Whenever possible, link to the original source.
- Think before you print. Whenever possible, edit online.

**DON'T keep obsolete blank forms, letterhead and business cards**

- Instead, securely destroy out-dated stationery to prevent unauthorized or inappropriate use.