

What Records Do I Need to Keep?

Transitory Records

(can be destroyed when no longer needed)

Notices & FYIs

- Announcing events
- Arranging meeting times
- FYIs – convenience copies or extracts

Preparatory documents

- Data entry documents
- Rough notes or calculations
- Preliminary drafts or revisions used in the preparation of the final version of correspondence, memoranda and reports

Copies

- Cc or bcc recipients where you are not the primary recipient
- Duplicates that have been reproduced or summarized in an official record

Substantive Records

(to be filed according to applicable retention schedules)

- Directive or approval of a particular course of action
- Certain drafts or previous versions with unique information
- Final Reports or recommendations
- Integral to understanding a staff/student or personnel relationship, issue, decision, agreement or project
- Meeting Agenda/minutes
- Policy changes or developments
- Case files
- Other records covered under the retention schedules