Contents

Introduction .................................................................................................................. 2
Scope and Audience ................................................................................................... 2
Relevant Acts and Regulations ................................................................................ 3

Records in the GoA ...................................................................................................... 3

What is a record? ........................................................................................................ 3
What Are Official Records? ...................................................................................... 4
What Are Transitory Records? .................................................................................. 4
Examples of Official Records .................................................................................... 5
Examples of Transitory Records ............................................................................... 5

Roles and Responsibilities in Managing Official and Transitory Records ............ 6

How to Decide Which Records Are Official ............................................................. 6
How to Decide Which Records Are Transitory ......................................................... 6

Exceptions ................................................................................................................ 7

When There Is a FOIP Request or Litigation ............................................................. 7

How to Securely Dispose of Transitory Records ....................................................... 8

Disposing of Non-Confidential Records .................................................................. 8
Disposing of Confidential Records ......................................................................... 9

Appendix 1: Official and Transitory Records Decision Diagram ......................... 10
Appendix 2: Tips for Controlling the Growth and Disposing of Transitory Records ................................................................. 11
Appendix 3: Acceptable/Unacceptable in Locked Bins and Transitory Boxes ........ 12
Appendix 4: Transitory Records Schedule (1995/007-A001) ................................ 12
Introduction

The Government of Alberta (GoA) is the trusted steward of information held on behalf of Albertans. The quality, reliability and integrity of information are critical to good decision making in the government. The GoA’s ability to respond to the needs of Albertans depends on how well it can create, use and preserve information to make decisions and take action to achieve its operational and strategic goals. Along with people and finances, information is a key business resource for the GoA and, as such, the management of that information is critical to achieving the government’s priorities.

GoA employees have an obligation to properly document what they do by creating accurate records of their activities and by ensuring that the appropriate records relating to business decisions are retained.

Some records need to be kept indefinitely (land, birth, death, and marriage records) while others can be disposed of as soon as the transaction is completed (advertising materials, meeting invites, and duplicates). To maximize the potential benefit from our information resources we need to manage them effectively. Doing so provides assurance that information-related risks are reduced and that staff are complying with their legal responsibility.

Identifying and retaining official records is an important part of that responsibility. Identifying and disposing of transitory records is just as important. The guidelines in this document are intended to help each government employee to:

- Decide which records to retain,
- Decide which records can be disposed of as soon as they are no longer needed,
- Dispose of transitory records securely, and
- Comply with the requirements of the Records Management Regulation (RMR) and the Freedom of Information and Protection of Privacy Act (FOIP).

Scope and Audience

This guide applies to all records created and held in any format (physical or digital). It outlines how to identify records. This is essential to achieving the right balance between retaining valuable information assets and ensuring that information that has become obsolete is disposed of.

This guide is applicable for all GoA employees, as well as Agencies, Boards, Commissions and Ministers’ offices. All government employees are obligated to follow established procedures for identifying and disposing of both official and transitory records.
Relevant Acts and Regulations

When handling records—official or transitory—there are two essential legal authorities to consider:

The **Records Management Regulation (RMR)**, enacted under the authority of the **Government Organization Act**, outlines the legal requirements for records management in the Government of Alberta. The **RMR**:

- Mandates the government-wide records management program,
- Assigns accountability to Deputy Heads for management of records in their custody or control,
- Requires records retention and disposition schedules for all government records, and
- Controls the destruction of government records.

The **Freedom of Information and Protection of Privacy Act (FOIP)** ensures that the government protects the privacy of individuals by controlling the manner in which public bodies collect, use and disclose personal information. The **FOIP Act**:

- Requires the government to be accountable to the public by providing a right of access to records in the custody or control of the government, subject to limited and specific exceptions, and
- Limits the collection, use and disclosure of personal information by the government and sets rules for the protection of personal information.

Records in the GoA

**What is a record?**

In the GoA, the **FOIP Act** defines “record” as a record of information in any form and it includes:

- Notes
- Images
- Audiovisual recordings
- X-rays
- Books
- Documents
- Maps
- Drawings
- Photographs
- Letters
- Vouchers
- Papers
- Any other information that is written, photographed, recorded or stored in any manner

Records provide evidence of government business and can be in any medium or format. Decisions we document that are related to our jobs, whether we use a computer, pen, camera or phone, can produce a record.
There are two classes of records: Official Records and Transitory Records.

What Are Official Records?

Official records document and provide evidence of business transactions. They are records that must be retained and filed in official records systems, and managed in accordance with government policies, standards, and practices. These are records that document or provide evidence of a ministry’s business activities.

Official records:
- contain information that has ongoing business value,
- are required to support business operations,
- document and provide evidence of business transactions,
- are required by legislation,
- protect the rights of citizens and the government,
- provide evidence of compliance with accountability or other business requirements, and
- have future business, financial, legal, research or archival value.

Official records should be stored securely so that they will be readily available to those who need them and are authorized to access them. They must be retained and disposed of in accordance with an approved Records Retention and Disposition Schedule.

What Are Transitory Records?

Transitory records are records in any format that are of short-term value, with no further uses beyond an immediate transaction.

In other words, transitory records are only required for a limited period of time, in order to complete a routine action or to prepare a subsequent draft or final version.

Transitory records:
- have no further value beyond an immediate and minor transaction,
- are produced or received in the preparation of other records which supersede them or for convenient reference,
- are not needed as evidence of a business activity and, as such, can normally be routinely disposed of,
- are not filed in official records systems, and
- are not required to meet legislative or regulatory obligations.

Why is it important to effectively manage transitory records? A significant amount of information retained by organizations is temporary in nature and does not merit long-term retention. It has
been estimated that in most cases only 20 percent of recorded information is official, while 80 percent is transitory. Hence, if transitory records are not destroyed, valuable space is taken up on servers and hard drives, in file rooms, workstations and storerooms, and makes it more difficult to locate and retrieve the records that we need.

<table>
<thead>
<tr>
<th>Examples of Official Records</th>
<th>Examples of Transitory Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Policies, directives, briefing notes,</td>
<td>• Advertising materials and junk mail,</td>
</tr>
<tr>
<td>• Final reports and recommendations,</td>
<td>• Blank information media such as obsolete stationery and blank forms,</td>
</tr>
<tr>
<td>• Business deliverables,</td>
<td>• Notices of social events such as retirements or office parties,</td>
</tr>
<tr>
<td>• Draft materials in the preparation of legislation, legal documents, audit reports, etc.,</td>
<td>• Duplicate copies used for convenience,</td>
</tr>
<tr>
<td>• Accounting working papers,</td>
<td>• “FYI” email notices on meetings, holidays, boardroom reservations etc.,</td>
</tr>
<tr>
<td>• Work plans, schedules, assignments and performance results,</td>
<td>• Photocopies of departmental publications, or</td>
</tr>
<tr>
<td>• Materials of historical or research importance,</td>
<td>• Draft documents, working or research materials used in preparation for the final version.</td>
</tr>
<tr>
<td>• Agendas and minutes of meetings, or</td>
<td></td>
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<tr>
<td>• Legal agreements of any kind.</td>
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</tbody>
</table>
Roles and Responsibilities in Managing Official and Transitory Records

- All employees are responsible for making decisions in the regular course of their work about which records are official or transitory.
- It is the responsibility of all GoA employees to be able to distinguish official records from transitory records.
- Senior Records Officers (SROs) are responsible for ensuring records retention and disposition schedules are created for all information holdings under the custody and control of the ministry.
- SROs should ensure that requirements for the handling and disposition of records are included in agreements between government organizations and contracted service providers.
- All employees are obligated to follow policies established by their organizations for identifying and disposing of specific types of records.
- The Transitory Records Schedule (1995/007-A001) delegates authority to destroy or delete transitory records to every GoA employee. It authorizes the routine disposition of transitory records:
  - Individual employees decide which records should be retained and filed and which records are of immediate or short-term usefulness,
  - Enables the immediate destruction of transitory records,
  - Can be applied to decisions about individual documents, but not to sets of records or file folders in a records series.

NOTE: Transitory records containing sensitive or confidential information must be securely destroyed or deleted (See the subheading How to Securely Dispose of Transitory Records). Transitory records cannot be routinely destroyed when there is a FOIP request or litigation. See the subheading When There Is a FOIP Request or Litigation.

How to Decide Which Records Are Official

Consider the following questions when deciding if an information resource is an official record:

- Will the information in the record have some future business, legal, or archival value to the government?
- Does it explain, justify, or document an official action or decision?
- Was it created during the course of official duty?

If the answer to any of the questions above is “yes”, then it is an official record. It should be retained and filed. See Appendix 1: Official and Transitory Records Decision Diagram.

How to Decide Which Records Are Transitory

Determining whether a record is transitory depends on individual judgment of the value of the record. If a record has only immediate value to government and will not be required again, it can
be disposed of as soon as we are finished with it. See Appendix 1: Official and Transitory Records Decision Diagram.

Exceptions

The above categories of official and transitory records are not absolute—there are always exceptions to the general guidelines. Records could appear to meet the criteria of being transitory, but the roles of the employees and the use of the information could make them official. For example, a post-it note that documents an approval or a recommendation that could help guide future financial or legal decisions may appear to be transitory because of its format, but it is an official document that must be kept.

Not all drafts are automatically transitory. Offices responsible for drafting legislation, legal documents, policies, budgets, or procedures might need to track the evolution of the final product. These offices may need to keep various drafts and working materials in order to have a record of changes that were made and why.

Documents are considered duplicates only when they are exact copies where nothing has been added, changed or deleted.

If unsure, you can ask the SRO in your ministry. A good rule is: If in doubt, keep the record.

When There Is a FOIP Request or Litigation

If a FOIP request is received, the ability to routinely destroy transitory records is suspended until the FOIP request has been processed and any appeal or appeal period has been completed. It is an offence to wilfully destroy records during this time. The same is true during litigation and discovery. GoA legal counsel, your FOIP Coordinator, SRO and/or IM manager are responsible for notifying staff when a FOIP request has been received or a legal action is underway.

The Alberta Rules of Court require the identification and disclosure of relevant records and information. Once the GoA is served with a Statement of Claim, or if litigation is reasonably anticipated, all relevant records must be preserved. If the litigation goes forward, this evidence will need to be produced. For more information on GoA obligations during litigation and discovery, see Roles and Responsibilities during Litigation and Discovery.
How to Securely Dispose of Transitory Records

As government employees we must make sure that records are disposed of in a secure manner. Information management employees manage the disposition of official records, as well as coordinate the destruction of transitory records containing confidential or sensitive information. However, we all regularly dispose of transitory records when we delete electronic documents and discard paper documents in confidential receptacles or Locked Bins. See Appendix 3 for the proper use of Locked Bins.

The method that should be used to dispose of records depends on the medium of the records, and whether or not they contain sensitive information.

Just like official records, some sensitive transitory records may contain:

- Personal information about individuals,
- Third party business information,
- Cabinet confidences, and
- Draft legislation or policies.

Sections 16-29 of the FOIP Act provide guidance on information that could be considered sensitive or confidential. For example, obsolete forms that could be misused should be disposed of as confidential transitory records. These include:

- Old unused cheques,
- Blank letterhead,
- Purchase orders, and
- Requisition forms.

Disposing of Non-Confidential Records

Sometimes, we might need to shred paper transitory records on-site or have it done by a mobile shredding company. If this type of process is used, make sure that the destruction procedure is secure and that the shredded paper is securely disposed of.

The process for disposing of non-confidential electronic records is the same. In the current environment, we should routinely delete emails, spreadsheets, etc. after we have determined that they are transitory records. This means regularly emptying Deleted Items folder, Sent Items folder, Public Folders, and electronic Recycle Bins once the records we need to retain are filed in an organized filing system.

In addition, messages or documents might be automatically deleted by a system after a specified period of time, or when an individual's allocated workspace on a network server is full.
If your organization does this, then it is particularly important to regularly determine which records need to be kept and filed, and delete the rest.

When deleting a transitory record, delete duplicates and drafts of the record that could be located elsewhere such as: C:\ drive, individual workspaces on networks, shared drives, active and archived email folders, flash drives, laptops, and other portable computing devices.

**Disposing of Confidential Records**

**It is not acceptable to place confidential records in regular recycle receptacles.** As with official records, confidential transitory records should be collected and disposed of through a secure process in your business unit. Confidential transitory records should not be disposed of through regular recycling procedures which are adequate for non-confidential transitory records. The Alberta Records Centre (ARC) manages the disposition of many of the government’s confidential transitory records through contracts with private shredding companies. The process is secure and environmentally friendly.

Government computers and electronic devices are often reallocated within and between departments, or sold as surplus outside government. Any official records on reallocated or surplus computers must be copied or moved to another storage device. Transitory records on them must be deleted, and the drives wiped according to government standards before such devices are transferred. The Ministry SRO should work with an information technology (IT) specialist to ensure that records are deleted properly. Failure to do so could result in an inadvertent disclosure of sensitive personal or government information.

Occasionally, to securely dispose of confidential transitory records, we may have to physically destroy other media such as microfilm, audio/video tape, flash drives, CDs, DVDs, or magnetic tapes. As with reallocated and surplus computers, it will be necessary to copy or move any official records to another storage medium before the first medium is destroyed.

If you are unsure whether a transitory record is confidential, err on the side of caution and treat it as confidential. For further assistance, please contact Service Alberta at SA.DispositionServices@gov.ab.ca or call the main line 780-644-3994.
Appendix 1: Official and Transitory Records Decision Diagram

The diagram below can help you identify records that are considered “official” or “transitory” and, thus, should be retained or can be deleted.

Step 1:
• Does the record (electronic or paper) document or provide evidence of a business activity, decision or transaction related to the functions and activities of your organization?

Step 2:
• Does it contain information that is of only immediate or short-term business value and won’t be required in the future?
• Is it a duplicate (or c.c.) that was circulated to you strictly for reference purposes and has the master copy of the email been filed?
• Is it a draft version of a document that will have no further value once an updated or final version of the document is produced?

Remaining Records:
• Needed to support business activities.
• Protect the rights of citizens and the Government of Alberta.
• Provide evidence of compliance with accountability or other business requirements.
• Have future business, financial, legal, research or archival value to the Government and the people of Alberta?

It’s a Transitory Record.
(Securely dispose of it.)
Appendix 2: Tips for Controlling the Growth and Disposing of Transitory Records

Here are some common-sense tips for dealing with transitory records:

- Don’t create unnecessary transitory records by downloading documents and distributing them as attachments. If possible, link to the original website instead.
- Transitory email should be deleted as soon as no longer required.
- Discard duplicate print and electronic documents when you are sure the master has been filed.
- Dispose of draft versions of documents and working materials that you don’t need to keep when you are sure the final version has been distributed and a copy filed.
- Securely destroy supplies of blank forms and business cards once they are obsolete.
- Discard routine, external publications once they have been circulated and/or you no longer need them.
- Use techniques such as Spam Filters to reduce spam.
- Dispose of information with short-term value once you have acted on it.
- Dispose of advertising material and unsolicited mail as soon as you are finished with it.
- Review emails regularly and delete transitory messages once they are obsolete.
- Erase voicemail messages after listening to them; erase archived messages once you no longer need to save them.
- Keep a recycle box by the photocopier for extra copies and photocopying errors, BUT be sure you don’t discard any copies with confidential or sensitive information.
- Make good use of the Locked Bins for confidential transitory records.
Appendix 3: Acceptable/Unacceptable in Locked Bins and Transitory Boxes

Locked bins are for the secure disposal of confidential or sensitive transitory materials that cannot go into the regular building recycle.

Acceptable in the Locked Bins:
- Paper, paper clips, staples, bull clips, some plastics (bindings, coils, covers).
- Small amounts of contaminants (CDs, Discs, DVDs placed in a plastic shopping bag and tied to bin handle will be put into bin on day of pickup).

Unacceptable in the Locked Bins:
- Newspapers, magazines, cardboards, large amounts of plastics, plastic sleeves/pockets, plastic bags, phone books, file folders, Shannon folders (Use building recycle).
- Binders, books, manuals (Send to Surplus Sales outlets).
- Candy wrappers, lunch wrappers, drink cups, decorations, woods, shoes, etc. (Garbage).

Transitory Boxes
- Use recycled ARC box, 8x11 paper box, nothing larger and not exceeding 30 pounds for overflow between locked bin pickups.
- Extra stock can be left in original boxes (envelopes, mail-outs, pamphlets, manuals, letterhead).
- Seal/tape the boxes and write TRANSITORY on each box. Do not write confidential on any box.
- Contaminants are non-biodegradable materials in records that cannot be pulped. Some examples are microfilm, tapes/disks, bound book covers, plastic coverings, stamps, mylar, CDs, Discs, DVDs, VHS tapes, file folders, etc.
  Note: For large amounts that are deemed transitory, box separately and indicate on the top of the box “contaminants”.
- All Transitory boxes must be marked with a large RED X.

If you are uncertain regarding the acceptable/unacceptable use, please contact Service Alberta at SA.DispositionServices@gov.ab.ca or call our main line 780-644-3994.

Appendix 4: Transitory Records Schedule (1995/007-A001)
### Records Retention and Disposition Schedule

- **Organization Name**: Service Alberta
- **Org Code**: SA
- **Schedule Number/Status**: 1995/007-A001
  - Approved

#### Program/Service Name:
- TRANSITORY RECORDS

#### SCHEDULE ADMINISTRATION

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|               | Comments: Y

- **Related Schedule(s):**
  - 2008/042 Information Management - Spam E-Mail

- **Cancels/Replaces Schedule(s):**

#### Amendment History

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<td>1995/007</td>
<td>Apr 04, 2003</td>
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- **Transfer Comments**: SRO: Hollow,Damian (8/1/2007) Comments: Please amend to include all GoA ministries

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#### Schedule Cancellation History

- None

#### SCHEDULE APPROVALS

- **Senior Program Manager**: Evans, Gordon
- **Date**: Apr 01, 2003
PROGRAM/SERVICE INFORMATION

Purpose/Function
Transitory records are records in any media that:

- will have no further value to government beyond an immediate and minor transaction; or

- will be only be required for a short time, until they are made obsolete by an updated version of a record or by a subsequent transaction or decision.

Transitory records are not required to meet statutory obligations or to sustain administrative or operational functions and are not filed in official records systems. Records required for business, legal, financial, research or archival purposes must be retained and filed in official records systems and disposed of in accordance with an approved records retention and disposition schedule.

The Transitory Records Schedule delegates authority to destroy or delete transitory records to every Government of Alberta employee. Transitory records containing sensitive or confidential information must be securely destroyed or deleted.

Brief History

The Transitory Records Schedule (# 1995/007) was approved by the Public Records Committee on April 4, 1995. Previously, transitory records were referred to as 'non-record material' and were disposed of under the authority of the Public Records Regulation (repealed in 1995).

Mandate/Legal Authority
Government Organization Act (RSA 2000, Chapter G-10, Schedule 11, Section 14)
Records Management Regulation (Alberta Regulation 224/2001)

APPRAISAL

Archivist: (not on file)
Manager, Government Records: (not on file) Date:
Director, Provincial Archivist: (not on file) Date:

Organization Purpose:

Business Function
Comments

Special Preservation/Conservation Factors

Special Storage Requirements

OPINIONS

No Opinions Requested.

SCHEDULE ITEMS

1 * Advertising Material
Advertising material includes solicited or unsolicited information received from businesses or individuals advertising their products or services. Examples of advertising material are paper or electronic brochures, company profiles, sales letters, menus, catalogues and price lists. Business units may choose to retain and file advertising material relevant to their operations.

Date Range: Media: Paper Microfilm Electronic
Other: Audio-visual
Legal Reference: FOIP Ref:

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Concurrence Conditions: Final Disposition: Destroy

Items to be cancelled: None

Reason for Amendment A001: Minor Change to Item Description and Number

2 * Blank Information Media
Blank information media includes anything that was intended to be used for collecting or storing information but was not used, or has been used and erased, and has become obsolete. Obsolete stationery and blank forms are examples. Another example is blank storage media such as video or audio tape, diskettes, compact disks, digital video disks, magnetic tapes or hard drives which must be destroyed to prevent the possible recovery of erased information.

Date Range: Media: Paper Microfilm Electronic
Other: Audio-visual
Legal Reference: FOIP Ref:

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Concurrence Conditions: Final Disposition: Destroy

Items to be cancelled: None

Reason for Amendment A001: Minor Change to Item Description and Number

3 * Draft Documents and Working Materials
Draft documents and working materials include draft versions of correspondence, reports, and other documents as well as research and working materials collected, and used in the preparation of documents. Once the final version of a document is completed and distributed, and a copy is filed in an official filing
system as the master record, most drafts and working materials become transitory records.

NOTE: Not all drafts and working materials are automatically transitory. In some cases, offices responsible for drafting legislation (acts, regulations, orders-in-council), legal documents (contracts, agreements, etc.), policy, audit reports, budgets, standards, guidelines, procedures, communications materials (publications, posters, films, etc.) or for conducting scientific research (laboratory notes, calculations, etc.) might need to track the evolution of the final product. These offices may need to keep various drafts, research and working materials in order to have a record of changes that were made and why.

Date Range: Media: Paper Microfilm Electronic Other: Audio-visual

Legal Reference: FOIP Ref:

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Items to be cancelled:
1988/081 22 COMPENSATION RESEARCH

**Reason for Amendment A001:** Minor Change to Item Title, Description and Number

4 * **Duplicates**

Duplicates are exact copies of documents where:
- nothing has been added, changed, or deleted;
- the copies have been used for reference or information purposes only; and
- the master version of the document has been filed in an official filing system.

A record must meet all three of these conditions to be a duplicate. If something has been added, changed or deleted then it is no longer a duplicate. It could still be transitory, however, depending on the significance and future value of the addition, change or deletion. Some examples of duplicates are
- photocopies of paper documents;
- copies of government brochures and pamphlets;
- duplicates of microfilm, CD-ROMs, DVDs, etc.
- duplicate audio or video recordings;
- electronic copies of e-mail messages and other electronic documents; and
- prints of microfilmed or imaged documents, e-mail messages or other electronic documents that are not the file copies for filing systems.

Date Range: Media: Paper Microfilm Electronic Other: Audio-visual

Legal Reference: FOIP Ref:

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Items to be cancelled:
None

**Reason for Amendment A001:** Minor Change to Item Title, Description and Number

5 * **External Publications**

External publications include books, magazines, periodicals, pamphlets, brochures, journals, newspapers and software documentation, whether printed or electronic, obtained from sources outside an organization. If they will have no future value, they can be discarded after use. Copyrighted information contained in these publications belongs to the publisher under copyright laws, not to the Government of Alberta, despite
the fact that the government has purchased the publication.

NOTE: The master copies of publications produced by or for an organization are not transitory and should be filed. Extra copies of obsolete internal publications are transitory. They are examples of duplicates. The Government of Alberta holds the copyright for publications that were developed and issued by or for government organizations.

**Date Range:**

- **Media:** Paper, Microfilm, Electronic
- **Other:** Audio-visual

**Legal Reference:**

**FOIP Ref:**

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**Concurrence Conditions:** Final Disposition: Destroy

**Items to be cancelled:**

None

**Reason for Amendment A001:** Minor Change to Item Title, Description and Number

**Information of Short-Term Value**

Documents with information of short-term value contain information that is of little or no interest, or importance to an office or is useful for only a brief period of time after which it has no further value. These documents do not have to be filed and can be routinely disposed of once employees are finished with them.

Some examples are:

- routine notices or memos regarding holidays or special events circulated to all staff or posted in public folders;
- insignificant or inconsequential information items concerning routine administrative or operational matters;
- other issues not pertaining directly to your office or not requiring you to act;
- personal messages and information; and
- routing slips and opened envelopes.

NOTE: The business units where these types of records originate should retain a file copy if the records document their activities and have some future value.

**Date Range:**

- **Media:** Paper, Microfilm, Electronic
- **Other:** Audio-visual

**Legal Reference:**

**FOIP Ref:**

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**Concurrence Conditions:** Final Disposition: Destroy

**Items to be cancelled:**

None

**Reason for Amendment A001:** Minor Change to Item Title, Description and Number

**COMMENTS**

Reason for Amendment A001: The Transitory Records Schedule is amended to make the content consistent with the publication: "Official and Transitory Records: A Guide for Government of Alberta Employees" (2002). The items have been rearranged into alphabetical order and renumbered, some item titles have been modified and the item descriptors have been simplified. No changes were made to the closure criteria, retention periods or final disposition of any of the items. (G. Evans, October 17, 2002)