**TIP SHEET – TRANSITORY RECORDS**

**Definition of Transitory Records**
Transitory records are materials with short term administrative value. They are retained solely to ensure the completion of a routine action or the preparation of a subsequent record. Therefore transitory records do not need to be captured in a recordkeeping system nor maintained for any period of time. They can be disposed of once their administrative use is over.

**Examples of Transitory Records**

- Announcements and notices of a general nature
  - Notifications of meetings, holidays or special events, acceptances, or regrets
  - “To All Staff” memoranda or emails of routine administrative matters

- Copies
  - Duplicate copies of documents for convenience or reference purposes
  - Minutes, agenda and circulars received from other parts of the University or external stakeholders which require no action
  - “cc” and “FYI” copies
  - Printouts or extracts from databases
  - Snapshots of websites

- Drafts
  - Preliminary drafts that do not reflect significant changes leading to the final version of a document, or record decisions
  - Spreadsheets used as working documents

- Informational materials
  - Unsolicited advertising materials including price lists, catalogue, product brochures, company profiles, etc

- Messages with immediate or short-term value
  - E-mails to schedule or confirm meetings and appointments
  - Voice mails, phone messages or telephone slips containing messages like “Please return call”

- Superseded lists
  - Superseded contact lists, membership lists, mailing lists, etc

- Superseded or duplicated stock of in-house publications with no further usefulness
  - Superseded administrative manuals, calendars, communication directories, etc
  - Published reports, newsletters, pamphlets, periodicals, or reference materials received from other parts of the University or external stakeholders which require no action

- Transmittal memos
  - Letter, fax cover sheets, routing slips, compliments slips that accompany a document, report or form but do not add value
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Disposal of Transitory Records

Review and dispose of transitory records regularly to ensure efficient use of office space and to reduce maintenance cost. For ease of access and arrangement for destruction, you may file transitory records separately from other records that must be retained for a specified period of time.

Note

The context of the records is important. Exercise judgment to determine if any of the transitory records may need to be retained for a longer period of time. For example,

- Drafts and working papers (including preliminary ones) for contracts and agreements of a considerable value may need to be retained
- A convenience copy of a document with handwritten notes containing substantive information is no longer a transitory record but a new University record that needs to be kept

For further questions about transitory records, or requests for advice on records and information management, please contact the University Records Archivist at 2859-2119 or email at h lua@hku.hk