# Transitory Records Cheat Sheet

These records can be deleted or recycled when "no longer needed for agency business"
but are **still subject to disclosure** while they exist.

## BLANK FORMS & PUBLICATIONS

Blank forms or extra copies of reports, brochures, newsletters.

*Excludes*: *Numbered forms like checks and master set of blank forms. One copy of all publications must be sent to WA State Library.*

## BRAINSTORMING

Post-it notes, Whiteboards, Flipcharts, or staff notes from brainstorming sessions.

*Excludes*: *Drafts, edits, comments, or brainstorming with other agencies or outside consultants.*

## CONTACT INFORMATION

Business cards, Outlook contacts, mailing lists, listservs and requests to be added/removed, or mail returned as undeliverable.

*Excludes*: *Emergency/Disaster Preparedness contact lists.*

## DRAFTING & EDITING

Drafts, edits, comments, mockups from INTERNAL staff.

*Excludes*: *Final versions and draft comments or edits from EXTERNAL sources like other agencies or outside consultants.*

## UNSIGNED DIGITAL DOCUMENT

Digital documents or document templates used to create official, signed, paper copies, like official letters or signed meeting minutes.

*Excludes*: *Copies of signed and sent letters.*

## SPAM & MAILERS

Catalogs, brochures, bulletins, newsletters, advertisements, or notices NOT created by the agency, not requiring any action by the agency, and not required for agency business.

## FYI'S & MEMO'S

Cookies in the breakroom, Bob out sick today, email read receipts, or out-of-office notices.

*Excludes*: *Leave records, records documenting or informing agency decisions or actions.*

## BROWSING HISTORY

Cookies, cache, temp files, saved passwords or web form autofill info, Google searches, or bookmarks.

*Excludes*: *Internet activity logs monitored by IT staff to ensure appropriate use.*

## TO-DO LISTS & TASKS

Records monitoring work in progress, like To-Do lists, Outlook 'Tasks', routing slips, workflow notifications, or status logs.

*Excludes*: *Strategic plans or unit level work plans.*

## RAW DATA CAPTURED ELSEWHERE

Raw data or temp records (i.e. survey responses or written notes) documented by formal record.

*Excludes*: *AV recordings of official meetings, electronic records that have been printed (i.e. emails).*

## REFERENCE INFO

Materials gathered from outside sources for reference use which are not evidence of the agency's business transactions. Conference handouts/materials, cheat sheets, white papers, copies of articles, listserv/RSS feeds.

## BASIC AGENCY INFO

Requests for hours of operation, mailing address, directions, front desk phone/fax #, web address.

*Excludes*: *Public records requests, advice or assistance given as part of agency's mission.*

## SCHEDULING

Invitations, checking availability, cancellations and rescheduling, and venue arrangements.

*Excludes*: *Calendars, meeting materials, and financial records.*

## SECONDARY COPIES

Printouts of database records, webpages, emails, CC's, convenience copies.

*Excludes*: *Copies of records held by other agencies or external organizations.*

## UNSOLICITED INFO

Info not requested/used by agency, extra info included with applications, unfinished forms, and unwanted donated records.

*Excludes*: *Records received as part of regular agency business.*