Records Management Guidance

Transitory Records

What is "transitory"?

Transitory records are records or information that have **"short-term**, **temporary informational"** value. These types of records are defined by Washington State records retention schedules, which give us the disposition authority to destroy them as soon as they are no longer needed for agency business under RCW 40.14. See the complete list of transitory record series, and many examples, below.

Why is this important?

All King County workforce members have transitory records and information. They are clogging up our Outlook accounts, OneDrive accounts, shared drives, and other places we store information. The huge volume of transitory records that we all have is a liability that makes it difficult to find information needed to support business or respond to public records requests. **All** transitory records that have not been destroyed are potentially subject to public disclosure under RCW 42.56.

What should you do with them?

- **Delete/destroy them** (no destruction documentation is required)
- Avoid creating or saving them in the first place
- You *can* retain them as reference, but do it sparingly
- **Empty** your **Deleted Items** folder in Outlook periodically, or they will remain there indefinitely
- Do **not** file them to Content Manager, and do not keep them with records that *do* have retention value

Examples of transitory records (email):

- out-of-office replies
- accepted, tentative, or rejected meeting notices
- email delivery notices and read receipts
- most auto-generated emails (including from Cherwell, PeopleSoft, and other systems)
- newsletters, bulletins and FYIs you have received (including emails sent to most ZZGroups)
- non-substantive communication (i.e. "thank you", "call me when you're free", "I'm running late", etc.)
- emails you are CCed on that do not require or result in any action from you
- received emails that are responded to by someone else, and your only action is to forward them
- personal or non-work-related emails
- Unsolicited email: spam, junk mail, or commercial advertisements
  (see pages 3-4 below for some tips on identifying transitory emails in bulk)

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Examples of transitory records (all other electronic formats):

- Duplicate copies
- Drafts that do not document significant or substantive changes
- Blank forms
- Informal notes that do not need to be retained, or are documented as part of a formal process
- Most documents in the Downloads folder in OneDrive (provided that you do not need to retain them or take further action on them)
- Screenshots captured or used to develop other documents or emails (many people have a "Screenshots" folder in their Pictures folder in OneDrive where these are automatically captured)
- Non-county records or materials kept as reference (training materials, handouts, articles, etc.)
- Electronic documents that are printed and finalized as paper copies, or finalized in other formats
- Internet browsing history and cached/temporary files
- Personal records
- Microsoft 365 sign-in notifications, including those received as text messages

Examples of transitory records (physical/paper records):

- Blank forms
- Duplicate copies (especially when the record was created as an electronic record)
- Informal handwritten notes
- Non-county records or materials kept as reference (training materials, meeting materials, handouts, articles, etc.)
- Business cards and other contact information
- Personal records
- Paper copies of records that have been digitized according to an approved DAD application

What if you still have questions?

The above is **not** an exhaustive list of what is considered transitory. Each person's records vary and there is not a broad definition that apply to all records. What is transitory for you is not necessarily transitory for someone else. A good start is to do your best to identify and delete records that are *obviously* transitory. For more information, look at your records retention schedule or ask your Records Management Lead for more information about what might be transitory for you and your agency.

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Transitory Record Series

Transitory records are defined by Washington State. Below is the comprehensive list of Disposition Authority Numbers (DANs) that are identified by the State as being transitory or having minimal retention value.

GS50-02-02R1 (Agency-Generated Forms and Publications – Copies)
GS2016-002 (Brainstorming and Collaborating)
GS2016-003R1 (Contact Information)
GS2016-004 (Drafting and Editing)
GS2016-005 (Electronic Documents Used to Create Signed Paper Records)
GS50-02-03 (General Information – External)
GS50-02-05R2 (Informational Notifications/Communications)
GS2016-006R1 (Internet Browsing)
GS2016-008 (Organizing/Monitoring Work in Progress)
GS2016-009R1 (Records Documented as Part of More Formalized Records)
GS2016-010 (Reference Materials)
GS50-02-01R2 (Requests for Basic/Routine Agency Information)
GS2016-011R1 (Scheduling – Appointments/Meetings)
GS50-02-04R2 (Secondar Duplicate Copies)
GS2016-012 (Unsolicited Additional Materials)

Transitory Record Tips – Email in Outlook

All county employees have transitory emails in their Outlook accounts. Although what is considered transitory will vary based on each person's position, there are some types of transitory emails that are common to all employees. Follow these 5 tips below to identify groups of transitory email that can be managed in bulk.

1. Arrange by **From** and then identify emails from these senders. All emails that you receive from these senders are transitory:
    a. **Cherwell Notifications**
    b. **Docusign via Docusign**
    c. **KCTraining**
    d. **King County Employees**
    e. **King County, WA**
    f. **King County**
    g. **KnowBe4**
    h. **SharePoint Online**

2. Arrange by **Type** and then identify emails with these types. All emails of these "types" are transitory:
    a. **Automatic Reply**
    b. **Meeting Request**
    c. **Meeting Acceptance**
    d. **Meeting Decline**
    e. **Meeting Tentative Acceptance**
    f. **Undeliverable Report (Message)**

3. Set up a **Rule** for emails "**where my name is not in the To box**" to separate emails in your inbox that you were CCed on, BCCed on, or received as part of a zzgroup or distribution list. The vast majority of these emails are going to be transitory for most people. Follow the below process to move all of these emails from your Inbox to another folder of your choice, to take action on in bulk.

    a. Select **Rules** on Home tab
    b. Select **Create Rule**
    c. Select **Advanced Options**
    d. Check "**Where my name is not in the To box**" and select **Next**
    e. Check "**move it to the specified folder**" then select the **"specified" link** at the bottom and **choose a folder** then select **Next**
    f. Select **Next**
    g. Check "**Run this rule now on messages already in Inbox"**
    h. Un-check "**Turn on this rule**"
    i. Select **Finish**

    Note that this process will only work on emails in the Inbox, which means it can't sort emails you already have in other folders.

4. Locate the **Drafts** folder. These are all transitory unless you plan to actually send the draft email.

5. Locate the **Deleted Items** folder. These have already been deleted, but still exist and are transitory until you empty your Deleted Items folder.