



**Portland  
City Auditor**  
Archives & Records Management



## Deletion of Transitory Information

The information or documents you prepare or use as a City employee that relates to the conduct of the City's business can be requested by the public or required for legal purposes. However, many messages that we receive or send on a given day have no legal retention value or are a duplication of information retained elsewhere. This document provides general guidance for identifying transitory information, messages or other documents that should be deleted as soon as their immediate purpose has expired.

Transitory information is defined as: Information that is of short-term value that does not need to be retained once read or acted on if not necessary to satisfy legal, administrative, fiscal, tribal cultural, or historical obligations of the City, as defined by ORS 192.005. Examples include duplicate copies of records, short-term logistical information, or information that serves purely to confirm or corroborate other record information<sup>1</sup>

These guidelines apply to information or documents that are not specifically listed on the City of Portland Retention Schedules (<https://www.portland.gov/auditor/archives/retention-schedules>), which are in compliance with the State of Oregon General Schedule for Cities (OAR 166-200-0200). Information for incoming and sent messages is provided below, with examples and additional details on the back of this page for reference. The examples focus on email but apply equally to transitory information in any format including text messages and Microsoft Teams messages.

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<sup>1</sup> No authorization is required to destroy materials which are excluded or exempt by statute from the definition of public records. (ORS 192.005, 192.170)

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## Sent messages

Often it is more important to capture and retain your work-related sent messages because it is evidence of some action on your part. Generally, you are responsible for retaining the documents that you create. Nevertheless, some sent messages have transitory value and may be deleted at will.

For example:

- Responses to Outlook meeting requests
- Responses to requests for information when it is understood that the requester is responsible for retaining the information (Usually another City employee).
- Courtesy responses to received messages (e.g. "Thanks!")
- Responses to routine requests for information, website links or documents which require no administrative action, no policy decision, and no special compilation or research for reply
- Non-business messages to family, friends, or coworkers

## Received messages

Below are examples of received messages of transitory value that may be deleted at will.

- Email listserv messages
- Citywide notifications and announcements of trainings, events, routine computer maintenance etc.
- Routine notifications or reference material received from non-City sources
- Bureau notifications of routine office meetings, events, or activities
- Unsolicited advertising
- Emails that serve only to transmit an attachment that is being worked on or retained elsewhere
- Items on which you are CC'd that you know are being retained by another addressee
- If you are CC'd on an email sent by someone from within the City, you can assume that that email is being retained. You may need to retain emails sent from outside the City.
- Outlook meeting requests (once a response has been sent).
- Non-business messages from family, friends, or coworkers (emails that don't relate to City business are not public records)

## Examples

### Scenario 1

I was sent the following text messages: *Can you meet now? Running late. Need to change meeting time. Sent you an email you need to read.*

- These are all transitory and can be deleted.

### Scenario 2

I was copied on a work-related email that went to several of my co-workers as well. Do I need to keep it?

- When there is an overlap of work responsibilities or several people are working on the same project, your bureau or workgroup must establish who is responsible for retaining which records and correspondence. Only the responsible email recipient, often the sender, needs to keep the email.

### Scenario 3

My bureau HR representative emailed me for my updated emergency contact information, which I responded to. Do I need to keep it?

- You can assume that the HR representative who asked for the information is retaining it centrally. You do not need to retain the request or your response.

### Scenario 4

A coworker emailed me a spreadsheet of project specs. Our bureau practice is to place the spreadsheet into the official project file in our electronic records management system. Do I need to keep the email?

- No.

### Scenario 5

My supervisor asked me to let everyone in the office know this week's staff meeting was changed to Wednesday. Do I need to keep that email?

- No. The fact that the meeting was held on Wednesday that week will be captured in the meeting notes or, if no notes are taken, in employee's calendars. The recipients of your email don't need to keep it either.

## Scenario 6

My buddy emails me jokes from time to time. Do I need to keep those as public records?

- Emails unrelated to your work at the City do not need to be retained. Tell your buddy to send his jokes to your home email address.

## Scenario 7

A member of the public was looking for a bureau report so I emailed them the link to the report on our website. Do I need to keep that email?

- If you are simply providing a link without any additional research, opinion, or analysis you do not need to retain it.

## Scenario 8

I emailed the vendor on my project that his latest submission did not meet the terms of the contract. He emailed me back and said he thought it did – we're going to meet about it in person. Do I need to keep those emails?

- Those emails contain information that is pertinent to the terms of the contract and should not be considered transitory. Follow the most relevant retention schedule for the content of this project.