

Deletion of Transitory Information

Correspondence, including email or text messages, that pertains to an employee's job responsibilities is a public record and must be retained according to the appropriate retention schedule and bureau procedures. However, many of the messages that we receive or send on a given day have no business or legal retention value, or are a duplication of information retained elsewhere. This document provides general guidance for identifying messages that should be deleted as soon as its immediate purpose has expired.

These guidelines are a supplement to bureau-level plans and directives. Information for incoming and sent emails 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 form. **Reminder this guidance does not apply if you are subject to a legal hold.**

Received Email

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

- 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
- Outlook meeting requests (once a response has been sent)
- Messages to schedule or reschedule meetings
- Non-business emails from family, friends or coworkers

Sent Email

Often it is more important to capture and retain your work related sent email because it is evidence of some action on your part. Nevertheless, some sent email has transitory value and may be deleted at will. For example:

- Responses to Outlook meeting requests (or messages to schedule or reschedule meetings)
- Responses to requests for information when it is understood that the requestor is responsible for retaining the information
- Courtesy responses to received emails (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 emails to family, friends or coworkers

Please contact the Archives and Records Management Division of the City Auditor's Office with questions.

Ext. 5-4100 or parc@portlandoregon.gov

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. Once those responsibilities have been established, only the responsible email recipient needs to keep the email. Often this is the sender.

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. 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 your bureau's protocol for retaining project correspondence.