

**STEP 1**  
Does the Record:  
 Provide evidence of a business activity, decision, or transaction?  
.....and  
 Is the evidence related to the functions and activities of AU?

**YES**

**NO**

**STEP 2**  
Is the Record:  
 of only immediate or short-term value and won't be required in the future?  
 a duplicate (or CC) sent to you for reference and the master copy of the email is filed?  
 a draft of a document that will have no further value once an updated or a final version is produced?

**NO**

**YES**

**STEP 3**  
Evaluate Remaining Records. Are they:  
 needed to support AU business activities?  
 needed to protect the rights of AU staff/ students?  
 necessary for accountability or other business requirements?  
 holding future business, financial, legal, research, or archival value to AU and its students?

**YES**

**It's an Official Record**  
File and Manage it appropriately

**It's a Transitory Record**  
Securely Dispose of It

# Decision Tree for Transitory Records

## Administrative and Operational Records at Athabasca University

For more information, please contact the Privacy, Policy, and Records Management Office (via Heather McPherson at [hmcpherson@athabascau.ca](mailto:hmcpherson@athabascau.ca))