



GUIDELINES FOR GETTING RID OF UNNECESSARY RECORDS

When preparing records for your onsite archival storage please discard the categories of material listed below, whether electronic or paper.

Extensive weeding is necessary to rid files of unnecessary record materials-whether paper or electronic. There will be more space, less cost, and efficient retrieval for pertinent information when needed in the future. Transfer only those materials that originate from a particular office or those which you- as an employee or associate of the Diocese- played an active role in creating. **Best practices are fulfilled when one separates the permanent files from those with a retention schedule of destruction/storage. Please label carefully on file the originating office, the contents, its retention of permanency or date of allowed destruction or storage.** Contact the Archives office for particular record retention details pertaining to schools, parishes and Diocesan entities.

Drafts: Upon final signature of a contract, agreement, letter or policy, all prior drafts, notes- whether handwritten, hard copy or electronic- should be destroyed.

Faxes: Thermal faxes are no longer an accepted means of communication. If you have machines that still have thermal copies, recopy the information on regular bond paper. The thermal copies will be unreadable in the future.

Inactive Routine Department Budget Files: Detailed and summary financial records should be retained by the Finance department of each entity. They do not need to be retained by separate offices. Please see the financial directives policy for further details.

Personal Papers: Materials relating solely to an individual's private affairs that are outside business professional pursuits, including diaries, journals, personal correspondence, or other personal notes that are not prepared in the process of transacting diocesan business are not to be sent to storage or the Archives.

Memoranda: Only those memoranda sent by your parish or office as the originating office should be transferred to storage. Discard those concerning routine matters such as holiday/vacation schedule, non-historical photographs, etc. **Retain those concerning policies, procedures and collections of funds. Correspondence and memorabilia sent outside the company relating to matters that are contentious or are likely to be contentious in the future should also be retained.**

Routine Correspondence (housekeeping type records): Included in the category are letters of transmittal or cover letters that merely forward an enclosure and add nothing to the contents of the item transmitted, meeting announcements, address changes, envelopes, invitations, calendars, phone logs and requests for general information.

Miscellaneous: Discard *multiple copies* of documents and publications, *old reference* materials and books, supply and vendor catalogs, office supplies, tickler files, all binders, outdated tax *guides*, records and publications of *other* departments and institutions, software manuals, blank forms, old stationery, obsolete equipment manuals and warranties, Christmas decorations, etc.

Reminder about keeping and storing permanent records and fragile formats: Permanent records and fragile items should not be placed in attics, basements or garages which are not climate controlled. (fragile formats include photos, slides tapes computer disks and original artwork which require a climate-controlled environment).