



Policy Name Transitory Records		Policy Number: 0940
		Effective Date: March 6, 2013
Approved By: Executive Team	Review Date: March, 2018	Date Revised: December 16, 2016
Classification: Administration		Page No: Page 1 of 3

DEFINITION:

Transitory Records means records in any media that:

- Have no further value or usefulness beyond an immediate and minor transaction;
- Are only required for a short time during and not usually after a transaction;
- Are made obsolete by an updated version of a record, subsequent transaction, or decision;
- Are a duplicate or copy of a record filed elsewhere; or
- Are works in progress or draft versions that will have no further value once the final versions are produced.

Transitory Records are **not original documents** of: client care, decisions or transactions, business activities, evidence of compliance with legislative requirement, or future business financial, legal, research or archival value to Agapé (Appendix A).

POLICY:

Agapé Hospice staff is responsible for the information that they carry into the community or store in their offices. Staff will follow this procedure to reduce security risks to business and/or health information:

PROCEDURE:

1. Appropriate Storage and Disposal of Information including Health Information:

- 1.1. Faxes may be received in the staff member's office. These faxes along with any other information must be stored in a closed file and kept in a secure area of the office to which other individuals do not have access.
- 1.2. Transitory information (for example information that is not kept as a permanent part of a client file) must be disposed of by shredding or deleting in case of electronic / digital duplicate records.
- 1.3. Whenever possible, use the least amount of Resident identification information when using/carrying Transitory Records.
- 1.4. Destruction of Transitory Records shall not commence, or shall cease with knowledge of, or notification of a Legal Hold.



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2. Proper Stewardship of Records:

3.1 Staff must always be aware of the type of records in their possession. If the information carried is lost or stolen, staff must be able to identify who may be affected as well as the potential impact of that information on their clients. Also, staff will need to recreate as much of the information lost as possible.

ATTACHMENT:

- Transitory Records Decision Diagram

REFERENCE:

Alberta Government. (2015). Official and Transitory Records: A Guide for Government of Alberta Employees. (web.)

<http://www.im.gov.ab.ca/documents/publications/OfficialTransitoryRecordsGuide.pdf>

[December 22, 2016]

Alberta Health Services. (2010). 1133-03 Transitory Records Policy. November 26, 2010.



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Transitory Records Decision Tree adapted from “A Guide for Government of Alberta Employees”:

APPENDIX 1: TRANSITORY RECORDS DECISION DIAGRAM

The diagram below can help you identify records that are considered “transitory” and, thus, can be deleted.

