Evaluate purpose of document, regardless of form or format

- Was it made or received in pursuance of law?
- Was it made or received in connection with the transaction of public business?

Ask:

- Is it evidence of UA’s organization, functions, operations, policies, procedures, decisions, or other activities?
- Does it have informational AND historical value?

Ask:

- Is it business related?
- Is it personal or junk?

- Is it still useful?

Discard immediately, shred if confidential, or save to a non-record folder

Non-Records:
- Library reference materials
- Museum exhibition materials
- Convenience copies
- Publications/documents for sale or distribution
- Publicly available publications
- Personal correspondence
- Advertisements (including SPAM)
- Personal messages
- Unsolicited vendor promotional materials
- Email discussion group messages
- Files copied/downloaded from internet sites

At end of retention period, ask:

- Is it actually or foreseeably required for legal, tax, fiscal, or audit uses?
- Should it be retained permanently in archives?

Retain any document under litigation hold until released by court or responsible authority; retain any other until purpose is served, then discard

Transfer to Records Management & Archives

Annual Review
Discard after purpose is served

Check common and department retention schedules
Discard transitory and reference materials after purpose is served, no later than 1 year:
- Correspondence of limited reference value
- Transmittal letters
- Informational bulletins/messages
- Duplicate documents
- Newsletters
- Publications generated in another department
- Catalogs

Revised: Monday, September 22, 2008

Reference: A.R.S. §41-1350