



Information
Management

Managing Records in Ministers' Offices

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Produced by

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1. INTRODUCTION

The challenges of records management

Ask the staff in any office about their most challenging tasks. Records management will almost certainly appear near the top of their list. Administrative staff are constantly struggling with questions such as:

- How do I decide what goes where?
- How can I ensure that the records are readily available when they're needed?
- How do I avoid discarding something that could be important – for legal, financial, historical or other reasons?

Now, the vast majority of records are being created electronically and an increasing number are being stored only in an electronic format. Records management is more complex than ever and also more necessary than ever.

When Cabinet Ministers' records are involved, there's another factor in the equation. The legal requirements for records management in government were changed as of April 1, 1995. As a result, some records that were previously considered to be the personal property of a Minister became government records, subject to the [Records Management Regulation](#).

In addition, the [Freedom of Information and Protection of Privacy Act](#), which came into force in 1995, provides a right of access to records in the custody or control of the government, subject to limited and specific exceptions. The FOIP Act also provides for the protection of personal privacy by controlling the way in which public bodies may collect, use and disclose personal information. The requirements of both the Records Management Regulation and the FOIP Act need to be considered when you deal with ministerial and other government records.

The importance of records management

Despite the many challenges involved, keeping electronic and paper records in good order and disposing of them properly is a job that must be done, and done well.

For one thing, organizing records well is just good business practice. Careful filing is the only sure way of knowing where things are when you need them. Records are the tools that you and your Minister need to help you make all sorts of decisions. Although it may be difficult to manage records, it is even more difficult to try to get along without a clear, consistent and appropriate filing system.

Secondly, the legal requirements for handling records must be followed. The Records Management Regulation enacted under the authority of the [Government Organization Act](#) makes it clear that Ministers' Departmental and Cabinet records created after April 1, 1995

are the property of the Crown and part of the government of Alberta's records management program.

The FOIP Act requires the government to be open and accountable to the public by providing a right of access to records and by protecting the personal privacy of individuals. An effective records management program is an essential tool in fulfilling the government's responsibility of being accountable to the public.

Since Cabinet Ministers' records often contain sensitive and restricted information, preventing unauthorized access to these records is a significant concern for the Minister's office. Systems for the storage, active use and transmission of these records must be planned carefully.

Many records, particularly those kept by Cabinet Ministers, have historical value and should therefore be preserved in the Provincial Archives of Alberta as a significant part of the province's heritage.

For more information

This guide has been prepared by Alberta Government Services, Information Management Branch to provide answers to questions about keeping and disposing of Ministers' records. It also offers helpful tips and suggestions about operating an efficient and effective records management system.

For more information, contact the Senior Records Officer for your department. This person and his or her staff will be pleased to provide advice and guidance on all aspects of records management. A list of contacts is included at the end of this guide.

2. DEFINING AND CATEGORIZING RECORDS

Definition of a “record”

In the Government of Alberta, a record is defined in the FOIP Act as meaning a record of information in any form and including:

- notes;
- images;
- audiovisual recordings;
- x-rays;
- books;
- documents;
- maps;
- drawings;
- photographs;
- letters;
- vouchers;
- papers; and
- any other information that is written, photographed, recorded or stored in any manner.

However, the definition of a record does not include software or other mechanisms that are used to produce records.

The key things to remember are that records document and provide evidence of business transactions, and can exist in any medium or format (paper, electronic, microfilm, audio/video, etc.). Therefore, electronic records (e.g., e-mail, word processing documents, spreadsheets, presentations, Web pages, etc.) must be managed as part of a records management program as well as paper and other records.

Emerging international standards emphasize the link between records and business. For example, the international standard on records management (ISO15489) defines records as documents created, received and maintained as evidence and information by an agency, organization or person, in pursuance of legal obligations or in the transaction of business.

Types of records

Defining a record is relatively easy. The hard part is categorizing them. In a Minister’s office, you will find three types of records.

Departmental and Cabinet Records

A substantial portion of Minister’s records will be departmental and Cabinet records, and records related to other government responsibilities assigned to the Minister. Departmental and Cabinet records are generated or received by Ministers in their capacity as Ministers of the Crown. They relate to a Minister’s Cabinet portfolio (the department and other affiliated agencies) or his or her role, duties and office in the Cabinet, Treasury Board and their committees, including:

- deliberations between a Minister and departmental staff
- communications among Ministers

- administrative records of the Minister's office staff
- external communications
- documents relating to special projects or committees

About one-quarter of the government records found in Ministers' offices will be *common records*. Common records are records generated in business functions and activities common to all government organizations. The vast majority of common records are generated by administrative or support functions and activities. Common records in Ministers' offices may be disposed of according to the *Administrative Records Disposition Authority* (ARDA) which is available on the Government Services, Information Management web site at www.im.gov.ab.ca/publications/pdf/arda.pdf. Contact your Senior Records Officer for further information and assistance.

Personal and Constituency Records

Personal and constituency records are generated or received by Ministers in their capacity as MLAs and private citizens. The requirements of the Alberta government's records management program do not apply to this category of records. They remain the Minister's personal property.

Personal and constituency records relate to:

- constituency business and matters relating to a Minister's role as a Member of the Legislative Assembly;
- political party matters such as election campaigns, party organization, caucus affairs and appointments; and
- the Minister's private life and personal, business or professional interests.

Departmental and Cabinet records, and personal and constituency records need to be kept separate because they are handled in different ways.

Transitory Records

Transitory records are the third type of records you need to know about. Transitory records are records that you don't need to file because you won't need them again in the future. They do not document and provide evidence of government or legislature business transactions. They can be legally and routinely discarded because they have little or no value to the government or legislature.

Transitory records include:

- documents containing information that is of minor importance and only temporary (immediate or very short-term) value, that won't be needed again in the future;

- exact reproductions of a master document (duplicates) where no information has been added or deleted (if notes are added to a duplicate, a new record is created, and this record may or may not be transitory);
- drafts and working papers used to prepare a final document (drafts and working papers may have some future value if they were used to prepare important documents such as legislation, budgets or policies, that your office is primarily responsible for. It's your call.);
- publications (books, magazines, brochures, newspapers, etc.) from external sources that will not have any future value;
- junk mail and advertising material that will not have any future value; and
- blank information media (e.g., forms that have not been completed) that have become obsolete.

Deciding which records are transitory is not as easy as it might seem. For example, you may have a post-it note that documents an approval, recommendation or business transaction that could help guide future administrative, financial or legal decisions. This note may appear to be transitory because of its format, but of course it is not. It should be kept. On the other hand, a copy of an e-mail message distributed to multiple recipients for information purposes only could be transitory if it has not been altered. The best rule of thumb to follow is that if there is any doubt about the status of a record, **do not** treat it as transitory.

It's a good idea to routinely dispose of transitory records once you're finished with them. If you retain and file this material, you will create clutter and spend too much time searching through unnecessary documents (paper and electronic) to find the ones you do need. (See Appendix A for tips on reducing the volume of hardcopy records in your office.)

For further details, see the publication entitled *Official and Transitory Records: A Guide for Government of Alberta Employees*, which is available on the Government Services, Information Management web site at www.im.gov.ab.ca/publications/pdf/OfficialTransitoryRecordsGuide.pdf for through your Senior Records Officer.

3.

MANAGING RECORDS THROUGHOUT THEIR LIFE CYCLE

Organizing active records

Active records are those that you refer to and use regularly. Your paper records should be stored where you can quickly and easily retrieve them. Records that you use only occasionally but that you still need on-site can be stored in the Legislature Building vaults. See the Contact List at the end of this document for the appropriate person to contact for assistance with the management of records in the various stages of their life cycle.

Personal and constituency records

As a first step, personal and constituency records need to be separated from departmental and Cabinet records. Neither the [Records Management Regulation](#) nor the [FOIP Act](#) applies to personal and constituency records, which are the Minister's property. Therefore, hardcopy personal and constituency records need to be stored in separate drawers or cabinets, possibly with colour-coded labels or in colour-coded file folders that make it easy to distinguish them from departmental, Cabinet and other government records. Similarly, you should organize electronic personal and constituency records in separate directories than electronic departmental and Cabinet records.

Departmental, Cabinet and other government records

Once you have separated out the personal and constituency records, you will need a clear plan for managing your departmental, Cabinet and other government records. Here are two options for managing these records:

Option 1. The Deputy Minister's office, correspondence unit or a central records repository in the department maintains the Minister's records relating to the department and agencies that report to the Deputy Minister. The heads of agencies reporting directly to the Minister maintain Minister's records relating to those agencies. The Minister's office retains only those departmental and agency records needed for current transactions and returns those records when they no longer need them, to the department or agency that sent them. The department and agencies become primarily responsible for the management of Minister's departmental records. The Minister's office only maintains the Minister's personal and constituency, and Cabinet records. Prompt access to paper departmental records could become an issue, especially outside of regular office hours. The management of electronic records could work well in this environment, as long as effective information systems and workflow procedures are established.

Option 2. The Minister's office maintains its own departmental and Cabinet records. The main advantage of this option is that it provides quick access to the records, especially those in paper format. However, the Minister's office is now responsible for managing these records. Also, there will be more duplication between the Minister's and the Deputy Minister's offices.

In deciding which records management approach will work best for your office, consider factors such as:

- the Minister's management style, for example, the nature and degree of the Minister's involvement in departmental matters;
- the department's physical location and communications arrangements;
- the information-sharing procedures that the Minister and Deputy Minister use; and
- whether electronic and paper records will be handled in the same way.

Retaining and disposing of records

The length of time the Alberta government's records are kept and what ultimately happens to them is governed by retention and disposition schedules set up under the authority of the Records Management Regulation. The vast majority of records are destroyed once they have fulfilled the business purposes for which they were created or received. A small percentage, including the records of Ministers' offices, are considered to have enduring value and are permanently preserved by the Provincial Archives of Alberta. The Records Management Regulation gives the Alberta Records Management Committee (ARMC) responsibility for making decisions about destruction and preservation.

All government employees, including the staff of Ministers' offices are required to follow the approved retention and disposition schedules. Records cannot legally be destroyed before their scheduled retention period has expired and they must be disposed of using authorized secure methods. Even transitory records are disposed of under the authority of a retention schedule (#1995/007).

Also, if a government ministry receives a request under the FOIP Act for access to any records that are due to be destroyed, the records must be kept until all stages of the request and review process are complete. This applies even if the ministry believes that the records are excluded from the scope of the FOIP Act.

Transitory Records

Transitory records can be disposed of as soon as you no longer need them, but there are several factors to take into account in deciding how to dispose of them.

- Non-confidential paper transitory records can be recycled without being shredded.
- Confidential paper transitory records should be securely shredded and the shredded material securely disposed of. If you have large volumes that need to be securely shredded, contact your Senior Records Officer.

Note: The FOIP Act provides some guidance on the subject of confidentiality of information by establishing what records must not be disclosed in response to a request for access under the Act. For further information, refer to Chapter 4 – Exceptions to Right of Access in the *Freedom of Information and Protection of Privacy – Guidelines and Practices*

Manual, available on the FOIP web site at www.gov.ab.ca/foip/guidelines_practices or consult with your FOIP Coordinator.

- For secure destruction of transitory records on other media such as audio/video tapes, microfilm, diskettes and CD-ROMs, contact your Senior Records Officer.
- **Note:** The government has a policy on the disposal of surplus electronic data storage devices. Ask you Senior Records Officer for information.

Personal and Constituency Records

Since the Records Management Regulation does not apply to a Minister's personal and constituency records, a Minister may dispose of these records as he or she sees fit. Also, these records are not subject to the FOIP Act. If a Minister decides to donate these records to the Provincial Archives, the Provincial Archivist in consultation with the Minister concerned determines access restrictions. These restrictions become part of the terms of the donation agreement. During the period of restricted access, the public cannot see the records without the Minister's written approval. At the end of the restricted period, the Minister will be contacted to alert him or her that the access restrictions are being removed.

Departmental and Cabinet Records

When we speak of "disposing" of records, we don't necessarily mean destroying them. The terms "disposition" and "disposal" encompass both destruction and transfer to the Provincial Archives for permanent preservation. Minister's offices should work with their Senior Records Officer to transfer their departmental, Cabinet and other government records to the Archives once they are no longer needed. The amount of work a Minister's office will have to do in transferring records will depend on the option chosen to manage departmental and Cabinet records.

4.

WHAT TO DO WHEN A MINISTER CHANGES PORTFOLIOS OR LEAVES POLITICAL OFFICE

The task of clearing out a Minister's office can be relatively straightforward, if you have organized the records appropriately, as outlined in this guide.

Reminder: *Minister's office departmental, Cabinet and other government records that were created before April 1, 1995, and all personal and constituency records, are not subject to the government's records management program.*

Here is a suggested process to follow when a Minister changes portfolios or leaves political office.

Step 1. Transitory Records

Identify and dispose of records that are obviously transitory. You can delete electronic transitory records.

Step 2. Personal and Constituency Records

Choose one of the following four options for disposing of personal and constituency records. In each case, the hardcopy records should be boxed with a brief content list included in each box (See Appendix B for tips on boxing records). Electronic records can be printed out and filed or downloaded onto diskettes. The instructions of the Minister for the disposition of records pre-dating April 1, 1995 should be obtained in writing and the Senior Records Officer for Executive Council should be advised of how they were disposed of, as they may be intermingled with departmental and Cabinet records. Executive Council does not have to be notified of the method of disposal of post-April 1, 1995 records.

- *Donate the records to the Provincial Archives of Alberta*

Personal and constituency records do not have to be "cleaned up" or "purged." If departmental and Cabinet records dated after April 1, 1995 are accidentally included in personal and constituency records, the Provincial Archivist will forward them to the appropriate Senior Records Officer.

- *Arrange for the Minister to take the records*

If a Minister chooses this option, the records should be boxed and removed along with his or her other personal effects.

- *Destroy the records*

Use the shredders that are available in the Legislature Building or ask the Senior Records Officer to arrange for shredding at the Alberta Records Centre. Since not all shredders securely destroy documents so that they can no longer be re-created (the shredded paper

must also be protected), you may wish to have the Alberta Records Centre dispose of the shredded paper.

Deposit the records with the Legislative Assembly (if the Minister leaves no instructions)

If a Minister leaves without giving instructions about the disposition of his or her personal and constituency records, the Legislative Assembly can secure the records in the Legislature Building vault and obtain disposition instructions from the Minister directly. **Do not** send the records to the Ministry.

Step 3. Dispose of departmental, Cabinet and other government records

- Ministers may keep all records created before April 1, 1995, as their personal property. However, if a Minister chooses, these records can be donated to the Provincial Archives of Alberta, provided that the Minister signs a waiver. Such a waiver might state: *"I hereby waive any interest I have in any departmental and Cabinet records created before April 1, 1995 and agree to donate them to the Provincial Archives of Alberta under a donation agreement to be developed in consultation with the Provincial Archivist."*
- Chronological files (a quick reference to documents generated in the Minister's office by date) are not transitory records. Ministers' offices should maintain separate personal and constituency, and departmental and Cabinet chronological files. The former will be the personal property of the Minister and the latter will be transferred to the Provincial Archives when the Minister leaves office.
- Cabinet and committee documents, including attachments, require special handling. Contact the office of the Deputy Secretary to Cabinet for assistance.
- The rules for the disposition of government records also apply to **electronic records**, which may be stored on network drives, individual hard drives, diskettes and other electronic storage devices. Since electronic records are fragile and can be subject to unauthorized alteration or deletion, those that must be retained should be printed out on paper. Ask your Senior Records Officer for guidance.

5. WHEN A MINISTER CHANGES PORTFOLIOS OR LEAVES POLITICAL OFFICE: RECORDS DISPOSITION CHECKLIST

Activity	Comments
<p>A. Review/Understand/Clarify</p> <ul style="list-style-type: none"> <input type="checkbox"/> Definition of a <i>record</i> <input type="checkbox"/> Definition of <i>transitory records</i> <input type="checkbox"/> Definition of <i>personal and constituency records</i> <input type="checkbox"/> Definition of <i>departmental and Cabinet records</i> <input type="checkbox"/> Methods of managing <i>departmental and Cabinet records</i> <p>B. Prepare Transitory Records</p> <ul style="list-style-type: none"> <input type="checkbox"/> Delete electronic transitory records <input type="checkbox"/> Recycle or shred non-confidential paper transitory records <input type="checkbox"/> Box confidential paper transitory records <input type="checkbox"/> Arrange destruction with Senior Records Officer (SRO) <p>C. Prepare Personal and Constituency Records</p> <ul style="list-style-type: none"> <input type="checkbox"/> Contact Deputy Secretary to Cabinet regarding handling of Cabinet and committee documents <input type="checkbox"/> Obtain Minister's instructions in writing <p>NOTE: Do not send personal and constituency records to the Ministry</p> <ul style="list-style-type: none"> <input type="checkbox"/> If to Provincial Archives: <ul style="list-style-type: none"> <input type="checkbox"/> Contact Provincial Archivist <input type="checkbox"/> Prepare letter or form <input type="checkbox"/> Box and list <input type="checkbox"/> Transfer <input type="checkbox"/> Advise Ministry SRO or Executive Council <input type="checkbox"/> If to be Taken by Minister: <ul style="list-style-type: none"> <input type="checkbox"/> Box <input type="checkbox"/> Transfer <input type="checkbox"/> Advise SRO and Executive Council 	

Activity	Comments
<ul style="list-style-type: none"> <input type="checkbox"/> If to be Destroyed: <ul style="list-style-type: none"> <input type="checkbox"/> Arrange for disposal <input type="checkbox"/> Shred/arrange destruction <input type="checkbox"/> Advise SRO and Executive Council <input type="checkbox"/> If No Instructions by Minister <ul style="list-style-type: none"> <input type="checkbox"/> Box, list and label <input type="checkbox"/> Contact Legislative Assembly Office <input type="checkbox"/> Transfer to Legislature Vaults D. Prepare Electronic Records <ul style="list-style-type: none"> <input type="checkbox"/> Delete electronic transitory records <input type="checkbox"/> Print out electronic personal and constituency records or download to diskette E. Prepare Departmental and Cabinet Records <ul style="list-style-type: none"> <input type="checkbox"/> Contact SRO for assistance <input type="checkbox"/> Obtain Minister's decision/waiver regarding pre-April 1, 1995 records <input type="checkbox"/> Box and label records <input type="checkbox"/> Prepare inventory lists <input type="checkbox"/> Arrange for transfer 	

6. CONTACTS

- Senior Records Officers for your Ministry:
www.im.gov.ab.ca/directory/pdf/SROgovernment.pdf and Executive Council:
www.im.gov.ab.ca/directory/pdf/SROlegislative.pdf on the Government Information Management Web site: www.im.gov.ab.ca/directory/pdf/IM-RMcontacts.pdf.
- Senior Records Officer for Legislative Assembly Office:

Jacqueline Breault, Manager, Corporate Services, phone (780) 427-1359, e-mail jacqueline.breault@assembly.ab.ca
- Information Management Branch (Government Services)

Diane Smith, Manager, Records and Information Services, phone (780) 422-3431, e-mail Diane.Smith@gov.ab.ca
- Provincial Archives of Alberta (Community Development)

Director/Provincial Archivist, phone (780) 427-1750
- FOIP Coordinator for your department:
Government FOIP Web site: www.gov.ab.ca/foip/coordinators/

APPENDIX A: GLOSSARY

Active Records - Records that have a high activity rate and are generally maintained in active office space.

Alberta Records Centre (ARC) - A facility operated by Alberta Corporate Service Centre (ACSC) to securely store inactive government records until their final disposition.

Alberta Records Management Committee (ARMC) - A senior interdepartmental committee established in the [Records Management Regulation](#) (A.R. 57/95). Their responsibilities concerning records scheduling and disposition are:

- ❑ to approve common government-wide schedules developed for use by all government organizations
- ❑ to approve records retention and disposition schedules for records of departments submitted by Senior Records Officers

Copy Set – A set or group of records that has generally the same content as a master set of records but that is maintained for a related but secondary business purpose. Copy sets of records can be kept by different offices or in the same office as the master set. Copy sets can be organized differently and kept in a different format than the master set. They generally have a shorter retention period than the master set.

Final Disposition – The last stage of the records life cycle. Final disposition can include the destruction of records or their transfer to the Provincial Archives of Alberta.

Freedom of Information and Protection of Privacy (FOIP) Act - Legislation that:

- ❑ provides for public access to all government records subject to limited and specific exceptions; and
- ❑ limits the collection, use and disclosure of personal information by the government and sets rules for the protection of personal information.

Master Set - The main, final or most complete set or group of records. Master sets are generally kept for a longer period of time than copy sets.

Provincial Archives of Alberta - The official repository for records of enduring value to the government and people of Alberta.

Record – A record of information in any form and includes notes, images, audiovisual recordings, x-rays, books, documents, maps, drawings, photographs, letters, vouchers and papers and any other information that is written, photographed, recorded or stored in any manner, but does not include software or any mechanism that produces records [[FOIP Act](#), s. 1(1)(q)].

Records Inventory - A listing and description of all records in a specific location, regardless of format.

Records Management Regulation – A regulation established under the authority of the Government Organization Act that:

- mandates the government-wide records management program;
- assigns accountability to Deputy Heads for management of records in their custody or control;
- requires retention and disposition schedules for all government records; and
- controls the destruction of government records.

Records Retention and Disposition Schedules - Legal documents that outline how long government records must be kept as they progress through the phases of their life cycle, and what their final disposition will be (either destruction or archival preservation) at the end of their cycle.

Senior Records Officer - Person designated by the Deputy Head to establish and implement a records management program in the department or agency.

APPENDIX B: REDUCING THE VOLUME OF HARDCOPY RECORDS

1. Here some ideas about how you might avoid dealing with unnecessary records that waste your time:
2. Remove your address from mailing lists when you don't need or want the information being sent.
3. Review your distribution lists, and stop sending reports to people who don't need the information.
4. Reconsider the way you distribute information. For example, are there some things you could post on a bulletin board instead of sending them by mail to various people?
5. Develop a system for identifying duplicate records. ("Duplicate – Master on File.")
6. Develop a system for identifying all draft records. (The "Draft" stamp is a very useful piece of office equipment.)
7. Discourage people from maintaining individual working files. Ask them to share electronic and paper files within groups.
8. Order realistic numbers of forms and brochures. Otherwise, they will simply land in the garbage bin when they are revised or eliminated.
9. Avoid unnecessary correspondence.
10. Keep correspondence concise.
11. Produce documents on double-sided paper whenever possible.

Unless you deal with large numbers of legal-sized documents, use letter-sized file folders and cabinets. (Legal-sized folders and cabinets take up 21 percent more space and weigh 24 percent more.)

APPENDIX C - BOXING YOUR HARDCOPY RECORDS

Here are some tips on placing records in boxes for storage or destruction:

Departmental and Cabinet, and Personal and Constituency Records

- Contact your Senior Records Officer for supply of ARC file storage boxes
- Group records by major categories (Departmental and Cabinet or Personal and Constituency)
- Using the Records Inventory form (available from the Senior Records Officer), list the names of all the files in each box and place a copy of this list inside the box.
- Keep files in their original file folders to make it easier to retrieve the documents.
- Place folders in boxes on their ends just as they are housed in a file cabinet or shelving.
- Pack files tightly enough that they do not slide down in the box, but loosely enough to permit efficient retrieval and inter-filing. Stuff partly filled boxes with crumpled paper.

Transitory Records (if using the services of the Alberta Records Centre to dispose)

- Empty photocopy paper and other similar boxes (provided they are not oversized) can be used to dispose of confidential transitory records. The General Purpose Box can also be used (contact your SRO). The boxes should be taped shut and should NOT be labeled as confidential.
- Transitory records do not have to be listed or arranged in any particular order in the boxes.