

Guidelines for Weeding Records

Revised June 2020

When preparing records for transfer to an off-site storage facility or to the Archives, please discard the categories of materials listed below. Extensive weeding is necessary when record groups contain large numbers of reference copies or duplicate copies of documents. Transfer only those materials that are original to your department or those which you as an employee or associate of the Archdiocese played an active role in creating.

The categories of materials listed below can be weeded and disposed of without permission. If they contain Personally Identifiable Information (aka PII; names with addresses, phone numbers, email addresses, etc.) or any kind of confidential information, the weeded records should still be shredded to protect privacy.

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

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

Memoranda: Only those memoranda sent by your department as the originating office should be transferred to storage. Discard those concerning routine matters, such as holidays, vacation schedules, etc. Retain those concerning policies, procedures and the collections of funds. Correspondence and memoranda sent outside the company relating to matters that are contentious or are likely to be contentious in the future should also be retained.

Department Financial Files: Detailed and summary financial records are retained by the Office of Finance. They are recommended to be retained within the department for approximately three years as reference documents.

Faxes: Copy all significant communications received on thermal fax paper to regular bond paper. Thermal copies will be unreadable in the future. Discard them.

Personal Papers: Materials relating solely to an individual's private affairs that are outside business or professional pursuits, including diaries, journals, personal correspondence or other personal notes that are not prepared in the process of transacting archdiocesan business are not to be sent to off-site storage or to the Archives. *(Clergy, particularly Archbishop or Bishop, can be an exception to this rule. Contact archives@archatl.com if you have personal papers of a priest of the Archdiocese that you wish to donate to the Office of Archives and Records.)*

Miscellaneous: Discard duplicate 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 stationary, obsolete equipment manuals and warranties, as well as old Christmas decorations.

Fragile Formats: Photographs, slides, tapes, computer disks, original artwork or other materials all require a climate controlled environment while in storage. They should never be stored in attics, basements, or garages. If such materials have historical or informational value, contact the Office of Archives and Records at archives@archatl.com regarding the special handling of these records.