EMAIL MANAGEMENT: GENERAL GUIDELINES

1. District procedures III-GG require employees to manage their email accounts.
2. Email, just as paper information, is a record and must be retained in accordance with the District Retention Control Schedule.
3. What is a record: Recorded information, regardless of medium or characteristics, made or received by an organization that is evidence of its operations, and has value requiring its retention for a specific period of time.
4. What is not a record: E-mail or other recorded information about lunch appointments, work group discussions, and administrative notices are examples of messages that do not have to be managed as "official" business records and may be discarded when no longer needed.

HOW TO DETERMINE IF E-MAIL IS A RECORD:

- Do you need the email to prove a business-related event or activity did or did not occur?
- Do you need the email to demonstrate a transaction: what was purchased or sold, for how much, in what quantity, when it was delivered, or where it went?
- Do you need the email to identify who participated in a business activity or had knowledge of an event?
- Does the email have legal value?
- Do you need the email to support facts you claim to be true, since the person with direct knowledge of the facts is not available?

If you answer YES to any of the questions above, the email is an official business record and must be retained in accordance with the district Retention Control Schedule. Users may elect to print out the email and store it locally as an active file and, after one year transfer it to the Records Management Department for long term storage. Remember, that all metadata (sender, receiver, date, subject) and attachments must be printed and stored for historical purposes.

If you answer NO to any of the questions above, it is probably not a record and may be discarded when no longer needed. Employees are urged to manage their email accounts daily, and delete all messages that are not records.

REMEMBER: It is the content and context-----what is said and why it exists---- that determines whether an email is a business record.

Contact the Records Management Department at x0590 or x0580 if you have any questions.