E-mail Retention Flowchart

Non-Record	Employee determines if E-mail is Non-Record or Record	Record

Did you generate or receive the information to use for your work in conducting City business? — **YES** →

Does it contain information value as evidence of the City's functions, policies, decisions, procedures, operations, mission, programs, projects, or activities? — **YES** →

Does it fulfill regulatory record keeping requirements specific to your programmatic work? — **YES** →

Does it document business transactions, such as; what happened, what was decided, what advice was given, who was involved, when it happened, the order of events and decisions? — **YES** →

Is it an original document related to City business that does not exist elsewhere? — **YES** →

↓ No

YES ← Is it a draft or interim document that has not been circulated to others or does not contain substantive comments and for which there is a final version being maintained?

YES ← Is it published or processed information that you received and use as a reference?

YES ← Is it a copy of a document or correspondence kept only for convenience of reference on which no action is taken?

YES ← Is it information accumulated and maintained at the workplace, but which does not affect or reflect the transaction of City business?

YES ← Is it junk mail or documentation that has no work-related informational or evidentiary value?

Delete non-record and transitory E-mail

or

Move E-mail to personal folder on local computer to be retained for reference only and delete when no longer needed.

and/or

Print E-mail and store in a manual file system or move E-mail to a local archive file for reference and delete when no longer needed.

or

E-mail left in Outlook mailbox longer than 28 days will be automatically archived on local computer and purged from the Exchange Server after 30 days.

Determine retention requirements

Policy and Program – messages that are especially important and often have a long-term retention. These records are described in the City's specific executive records retention and disposition policies and must be retained in accordance.

Administrative Correspondence - records pertaining to the administration of an agency or division including coordination of programs, policy, regulations and procedures that impact the agency must be retained for two years after close of fiscal year in which created then transferred to archives for appraisal and final disposal.

General Correspondence - non-executive administrative incoming/outgoing in internal correspondence created or retained than reflect communication regarding program procedures, general work activities, and responses to information requests must be retained for one year after close of fiscal year in which created.

Short term

Move E-mail to personal folder on local computer or if available; electronically archive the E-mail using the message archiver in Outlook. Message will be automatically deleted after two years.

Long term

Print E-mail and store in a manual file system, scan to permanent file storage or move E-mail to a local archive file for long term storage.