

City/County/Town Name

Email Retention Policy

The purpose of this policy is to establish an email policy for all offices that create, use, and manage email communications as part of the transaction of business in compliance with the [County/Local General Retention Schedule](#).

I. Intent

To establish guidelines that will promote the effective capture, management, and retention of email communications.

II. Scope

This policy applies to all **city/county/town name**-provided email tools for business use. Personal email accounts shall not be used to conduct public business. Doing so is a violation of this policy. Note that any email account used to conduct public business may be subject to litigation or APRA requests.

III. Definitions

- A. Email** messages are similar to other forms of communicated messages such as correspondence, memoranda, and letters. These include non-record (transitory) emails and public-record emails.
- B. Non-record or Transitory Email Communications** are considered to have no administrative, legal, fiscal, or archival requirements for their retention. Examples of such email communications include the following:
1. personal correspondence such as personal lunch invitations, unsolicited advertisements, and spam;
 2. quasi-official notices including memoranda and other records that do not serve as the basis of official actions or act as the source of this information (i.e., holiday notices, meeting confirmations, etc.).
 3. **Other example pertaining to your office**
 4. **Other example pertaining to your office**
- C. Public-Record Email Communications** include any writing containing information relating to the work of your office prepared, owned, used, or retained by **city/county/town name**. Examples of emails that may constitute a public record include the following:
- Policies and directives, correspondence or memoranda relating to official business (excluding duplicates), agendas and minutes of meetings, any document that initiates, authorizes, or completes a business transaction, and final reports or recommendations.

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IV. Responsibility for Retention

The **city/county/town name** email system is not the public records repository for email. Each **department/office/agency** is responsible for complying with applicable records retention schedules for its public records. For a list of all applicable records retention schedules please visit www.in.gov/iara.

V. Method of Retention

Email records that have not met their retention should be saved using one of the following methods:

1. Method:
2. Method:

VI. Mail Attachments

Attachments should be retained or disposed of according to the content of the attachment itself based on its appropriate retention, not the email which transmits the attachment.

VII. Responsibility for Email Management

A. Information Technology Division Responsibilities

1. Maximum Mailbox Size

- a. Ensures that email account or mailbox will be limited to a maximum size of **XXGB** of data. This includes all folders and subfolders and containers that reside within a user's email account or mailbox. Examples include the inbox, sent items, deleted items, drafts, contacts, attachments, and calendar items.
- b. If a mailbox exceeds the **XXGB** limit, the mailbox will not function to send or receive email until space is cleared.
- c. Users will be notified when their mailbox reaches 90% of capacity.
- d. Messages will automatically move to the user's archive folder after they are **XX days/months/years** old.

2. Automatic Deletion of Emails

Emails in the Deleted Items container will be purged **daily/monthly/annually** and not backed up. This is the default email system setting and may not be configured differently.

3. Archived Emails

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All archived emails older than **X** years will be purged. Contacts and Calendar items will not be purged as part of this process; it will be up to the user to determine if those items need to be purged for space requirements.

B. User Email Management Responsibilities

1. Maximum Mailbox Size

- a. Staying below the maximum mailbox size of **XXGB** is the responsibility of the mailbox user.
- b. Work related attachments should be retained using one of the methods described in section V.

2. Automatic Deletion of Emails

Users are responsible for understanding that the system is set by default to purge all items within the Deleted Items container on a daily basis. Users are responsible for understanding that altering this setting is a violation of this policy.

3. Archived Emails

Users are responsible for retaining emails in accordance with section V. Users are responsible for understanding that emails will be automatically purged once the **X year archival** period within the system has been met, and must plan accordingly.

4. Additional Responsibilities

If you have any additional responsibilities such as system configurations, file format requirements, or retention instructions include them here.

VIII. Litigation Proceedings

Regardless of retention requirements, mailbox items pertaining to a pending or active legal proceeding must be retained until the proceeding is finally concluded. It is the responsibility of the department involved to submit a request for an exemption from this policy to the IT department: **method of submission here (email, ticket, etc)**. The notification must be done in a timely fashion and in writing.

IX. Emergency Event Communications

In the event that an unforeseen emergency requires the use of email communication as part of the business decision making processes, it is the responsibility of those parties involved to coordinate with the IT department to ensure any ensuing records are retained appropriately.

X. Responding to Public Records Request

It is the responsibility of the department involved to immediately notify the IT department of a public records request if the IT department's assistance is required to provide the public

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records. Such requests should be submitted: **method of submission here (email, ticket, etc).**

XI. Email Accounts When Employee Leaves Employment

When an employee leaves employment, it is the responsibility of that department to immediately notify the IT department. The employee's mailbox will be maintained for sixty (60) calendar days. Individual user mailboxes will be purged after sixty (60) calendar days unless that former employee's department head requests an extension, in writing or the IT department is notified items in the email must be retained for a longer period of time based on retention schedules.

XII. Amendments

City/County/Town name reserves the right to amend or revise the contents of this policy as deemed suitable. Each employee will be provided with a notice of all amendments and revisions to this policy.

Approved on this _____ day of _____, **YYYY** by the **County Name** County
Public Records Commission.

Add any signatory lines here as applicable