Email is just as much a record as any traditional paper record and must be treated in the same way. It is the content of each message that classifies it as a record. If a particular message would be retained as a paper memo, it should still be filed (either in your email program or in your regular directory structure), and it should be retained for the same length of time as its paper counterpart.

Most Emails have a transitory value and can be deleted. They have no legal, fiscal, administrative or archival value and can therefore be deleted as soon as they have fulfilled their purpose. These emails include preliminary drafts, routine replies/requests for information, emails sent as reference or for informational distribution, emails used to set-up or accept meetings, announcements, acknowledgements, etc.

Creation, do you really need it? Before creating an email message, consider why you are doing so. Can other modes of communication be used more efficiently or effectively? Is it necessary to create and send ‘information only’ emails? Is it necessary to distribute this information to all of the listed recipients? Limit your cc’s to those who really need the information. Avoid replying to emails you receive unless a reply is actually required. Consider carefully before hitting that ‘reply all’ button and remove all but the last two or three messages in the thread before you do.

Emails you must manage contain the following content and have specific retention periods: policy and procedure directives; substantive decisions (matters of campus/university business); instruction (the implementation of substantive decisions); matters of University business; legal or audit issues; approvals for purchases or other actions to be taken; final reports of recommendations; documentation of departmental/office actions; decisions operations and responsibilities, etc. Email with a specific retention period can be printed and filed in a paper filing system, or it can be retained electronically. If messages are retained electronically, you must ensure they remain accessible and readable for the full retention period.

Objectivity. Be objective in the content of your email. Remember -- email may be accessed during litigation or audits. Write your email as if it were being published on the front page of our local newspaper.

Subject line information is the first step to ensuring order rather than email chaos; so be objective and accurate when choosing the subject heading. Make it clear, concise and be sure it clearly articulates the purpose of your email. When replying to an email, avoid including a long email thread in your response.

A Disposition Log for official email records that have met their retention must be completed and submitted to Records Management for review and approval BEFORE the records are deleted.

Visit us online: http://www.utmb.edu/compliance/records/rmdefault.asp

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