Records Management and E-Mail

The purpose of this document is to provide guidance to state and local government agencies regarding the retention of public records created through e-mail.

Agencies need to consider the following five factors when managing e-mail.

1. **Is my e-mail a public record?**
   If the e-mail is created or received in connection with the transaction of the agency’s public business (such as discussion of a policy revision, review of a grant application, evidence of a decision made, etc.), then it is a public record and needs to be retained according to the appropriate retention schedule.

2. **When is my e-mail not a public record?**
   If the e-mail is not related to agency business, such as “chit chat” between colleagues (making plans for lunch, forwarding a joke, etc.) or messages from family or friends of a personal nature, then the e-mail is not a public record and should be deleted. Do not mix business and personal e-mail. When e-mail contains both personal and business discussion, the e-mail must be treated as public record.

3. **How long do I need to keep my e-mail?**
   Retention is based on content, not format. Employees should use the same records series for the contents of an e-mail that they would use if the same information was distributed on paper. E-mail can most often be classified as correspondence (GS-19 for localities; GS-101 for state agencies). When e-mail is not correspondence, the employee must determine the content and identify an appropriate retention period based on the retention schedules.

4. **How should I retain my e-mail?**
   Agencies need to determine how they will retain e-mail classified as public records through a collaborative discussion between the agency records officer, management, and IT staff. Agencies should not purchase e-mail “archiving” systems that will not allow them to purge e-mail from the system.

5. **How can I make managing my e-mail easier?**
   Set aside time daily or weekly to manage your e-mail; delete those that are non-records and sort those that are records into folders according to the appropriate records series. Use a meaningful subject line to make sorting and retrieving e-mail simpler (for example, refer to the project name or case number in the subject line); change the subject line if the subject changes throughout the thread. Retain only the final thread in an e-mail instead of each individual e-mail. Save attachments, either by e-mailing them back to yourself at the end of the thread or saving them to a network drive.

Records Analysis Section
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