Lucas County Email Retention Policy FAQ

It is essential that Lucas County agencies manage their electronic mail (e-mail) appropriately. Like all other county records, e-mail is subject to Freedom of Information Act (FOIA) requests and litigation. This information sheet is designed to help all Lucas County employees who use county e-mail to follow procedures about the retention of county e-mail.

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What is an Email Retention Policy?

Email retention refers to the limits placed on the length of time an email should reside in a user's mailbox or be retained on county servers. The Lucas County email server provides "post office" facilities for current users. Its purpose is to receive and store incoming mail for users and to forward outgoing email for delivery. Users are assigned individual "mailboxes" where incoming and outgoing email messages are stored until deleted by the user.

Why do we need this policy?

Lucas County needs an email management policy to comply with the law, to be fiscally responsible by eliminating unnecessary file storage space, and to apply best practices for retaining electronic records, which will improve operational efficiencies and effectiveness.

Are email records handled differently than paper?

Email messages should be treated just like a paper document in terms of retention. The content of the document is what is important, not the format.

Is e-mail a public record?

E-mail messages are public records if they are created or received as part of performing a public employee's official duties.

Does my e-mail belong to me?

All e-mail messages that are created, received or stored by a government agency are public property. They are not the property of employees, vendors or customers. Employees should have no expectation of privacy when using government computer resources.

How do I know if an email is a county record?

A county record is any document (including email), that is part of a mission critical decision, shows why a decision was made, or is required for legal, tax, fiscal, or audit purposes. Email messages that meet any of these criteria are county records, and have the same retention as similar paper based records.

What are my responsibilities as a government employee who uses e-mail?

Employee responsibilities for managing e-mail messages are the same as those for other records.

•Employees are responsible for organizing their e-mail messages so they can be located and used efficiently.

•Employees are responsible for using an approved Retention and Disposal Schedule to identify how long e-mail messages must be kept.

•Employees are responsible for keeping e-mail messages for their entire retention period, and for deleting e-mail messages in accordance with an approved Retention and Disposal Schedule.

How should I keep my mailbox clean?

•Routinely review the contents of your mailbox, just as you routinely clean out your paper files.

•Delete messages that no longer have significance.

•Move messages that have significance and need to be retained to appropriate alternative storage locations on a hard drive or network storage location.

Who is responsible for retaining email messages, the sender or the recipient?

Just as with paper records, both senders and recipients of email messages must determine if a particular message should be retained based on their responsibility to maintain the information.

How long do I keep an email message that is not a county record?

Email messages that are not county records are considered transitory correspondence. Transitory messages are created primarily for routine communication and should be deleted once they are no longer useful. For instance, an email message that notifies employees of an upcoming meeting would only have value until the meeting is held.

What if I am not sure how to classify an email message for retention purposes?

If you are unsure about the classification of a message, ask your manager for assistance. If you still need help in classifying a message, contact the System Records Retention Officer.

How should I store my e-mail?

Agencies have many options for storing e-mail, each of which has benefits and disadvantages. Agency directors should decide which option agency staff will use. Options include: 1) retaining the message within the "live" e-mail system, 2) saving the message on a network drive in a folder that contains other electronic records that document the business process, 3) printing the message and filing it with other paper records that document the business process, 4) storing the message in an e-mail archive that is accessed by the e-mail software.

How should I organize my e-mail?

E-mail messages should be organized in a way that makes them easy to find. E-mail may be organized by subject, by case number, or by another logical system. Regardless of which technique is used, e-mail folders should be coordinated with any paper or other electronic filing systems that are in place.

How long will my email be kept on backups of Lucas County email servers?

No more than five (5) years. Backups are maintained solely for systems restoration and disaster recovery purposes, not for email retention purposes.

What happens to the e-mail of former employees?

Agencies are responsible for ensuring that the e-mail (and other records) of former employees are retained in accordance with approved Retention and Disposal Schedules. Any email over 5 years old will be purged, this includes proxy, generic and prior employee emails.

How do I save older emails outside of GroupWise?

Saving emails and attachments
1. Right click on the email that you want to save, click "Save As".
2. Choose the message format to save the file in (pdf, rtf or plain text).
3. You can change the file name here if you'd like.
4. Choose which parts of the message you want to save by clicking the drop down arrow next to "What:"
4. Choose the folder to save the file in and click Save.

You can highlight multiple emails to save at one time. Each email will save as a separate file and will be labeled with the subject. Duplicate subject names will be overwritten in GroupWise versions 8.x and 12.x! All pertinent information including the sender, recipients, date and subject are noted at the top of the document.

Where should I save my emails?

LCIS recommends saving your email files to the Network Files Share for your agency.

Is it possible to just move all of my older emails to a new drive?

This is not recommended as the files would then become decentralized and defeat the purpose of the email retention policy. You should only save emails that are needed for future reference.

Can I save my GroupWise email folders and their contents onto another drive or device?

Yes. First set up a new folder on your PC, desktop or flash drive. You could label this "Saved Emails". You might want to create sub folders to match the existing email folders that you have set up in Groupwise.

Emails are automatically named based on the subject of the email. **Duplicate subjects will be overwritten in GroupWise versions 8.x and 12.x**, so you must be sure to change the subject name for these duplicates. See **"How do I change the name on a duplicate email?"** below for directions on changing email names.

Doesn't archiving take emails from the GroupWise server and store it elsewhere?

Yes, but they remain in the county system and this defeats the purpose of the email retention policy.

How can I save multiple emails at once, instead of saving each one individually?

You can highlight multiple emails to save at one time. Each email will save as a separate file and will be labeled with the subject. **Duplicate subjects will be overwritten in GroupWise versions 8.x and 12.x!** If you have duplicate subject names you must change the subject name for all duplicates. All pertinent information including the sender, recipients, date and subject are noted at the top of the document.

1. Hold "Ctrl" then click on the emails that you want to save, right click then choose **"Save As"**.
2. Choose the message format to save the file in (pdf, rtf or plain text).

3. You can change the file name here if you'd like. If you don't change the file name it will be the subject of the email.
4. Choose which parts of the message you want to save by clicking the drop down arrow next to **"What:"**.
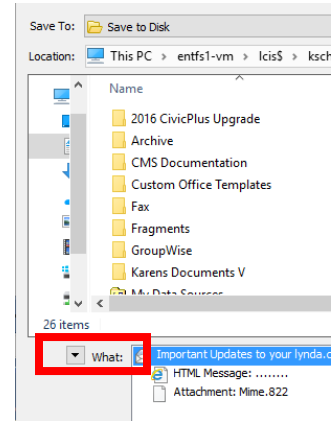
4. Choose the folder to save the file in and click **Save.** Each email will save individually.

How do I change the name on a duplicate email?

Emails saved as txt and pdf files are automatically named based on the subject of the email. **Duplicate subjects will be overwritten in GroupWise versions 8.x and 12.x**, so you must be sure to change the subject name for these duplicates.

To rename an email in GroupWise versions 8.x and 12.x:

1. Click on the email to open it. (figure 1)
2. Click on the **Personalize** Tab. (figure 2)
3. In the **My Subject** area, type in a new subject (add a date, # or description)
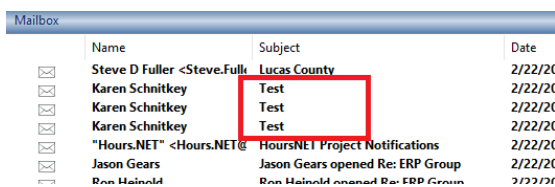4. Close the email. (figure 3)
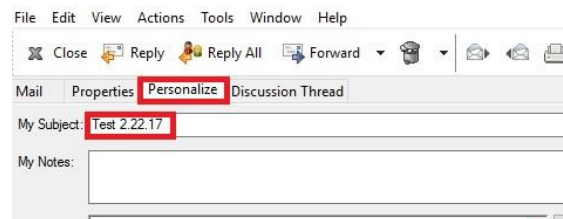5. Repeat this for each duplicate email.
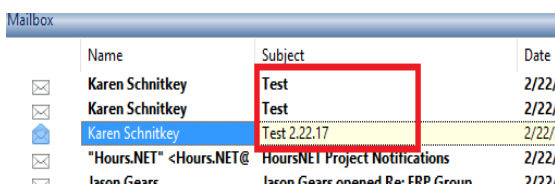
Figure 1

Figure 2

Figure 3