



# A guideline courtesy of OUS Records Management Services

## Records Retention and E-mail

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**NOTE!** The new [OUS General Records Retention Schedule](#) (OAR Chapter 166, Division 475) should be used to categorize records and apply appropriate dispositions. For the purpose of the general schedule, the Chancellor's Office can be considered an institution.

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### Introduction

E-mail systems are communication devices, not record keeping systems. Messages are sent via e-mail and documents can be distributed, but the system itself should not be used to store these records. Just as you would not store mail you send or receive in your regular mailbox, electronic mail should be dealt with in a similar fashion. Retention of e-mail is based on content, not the media on which it resides. Most e-mail is a record and considered a public record unless specified in [ORS 192.005 \(5\)](#).

It is suggested that important documents and communications either be (1) deleted if their retention period has passed, (2) printed and filed appropriately, the e-mail deleted, and the hard copy kept for the applicable retention period, or (3) "archived" in the e-mail system until [a] the retention period has lapsed for records with a retention of 18 months or less or [b] the project or activity has been completed. At the end of the project/activity, records should be printed and filed and the e-mail deleted from the system.

### Tips for Identifying Records of Importance

As you make retention decisions regarding your e-mail, keep in mind these simple steps:

- 1) Delete ephemeral correspondence immediately (see description below). If you spend over 15 seconds deciding, it is probably not ephemeral and should be printed and filed, or temporarily archived in the GroupWise mail system.
- 2) If you cannot decide where something should be filed in hard copy, archive it. Is it related to a project? A contract? Your department's budget? A topic? An action? The categories in the retention schedule should be of assistance in helping you decide.

### Some Common Record Types

The following can be found in the [General Records Retention Schedule, Administrative Section](#)

**Ephemeral Correspondence:** Records of a preliminary or informational nature received or sent which do not contain significant information about an institution's programs, fiscal status, or routine agency operations. ACTION: delete after reading.

**General Correspondence:** Communications received or sent which do not contain significant information about an institution's programs. Includes: letters sent and received; memoranda; notes; transmittals; acknowledgments; community affair notices; charity fund drive records; routine requests for information or publications; enclosures and attachments. ACTION: Archive in system for 1 year and delete, or print, delete e-mail, retain hard copy for 1 year.

**Administrative Correspondence:** Communications received or sent which contain significant information about an institution's programs. May include letters sent and received, memoranda, notes, enclosures, and attachments. ACTION: Print and file, delete e-mail, retain hard copy for 5 years.

**Executive Correspondence:** Documents significant events and the development of administrative structure, policies, and procedures of the office. It may also record the historical development of the office. May include: letters sent and received; notes; directives; acknowledgments; and memoranda. Correspondence may be intra-office, within OUS, and with non-OUS agencies, organizations, and individuals. ACTION: Record Copy - Print and file, delete e-mail, retain hard copy permanently. Other copies - print and file, delete e-mail, retain for 2 years.

**Policies and Procedures:** Provides a record of internal development and documents guidelines for consistency and continuity in the operation of the unit. May include mission and policy statements; planning documents outlining responsibilities and goals; organization charts; publications preparation guidelines; emergency procedures; job descriptions; office procedures; handbooks; desk manuals; and related documentation and correspondence. If created, administered, and distributed by your department, one copy (the record copy) needs to be kept permanently. If received from departments and/or administrators for you to follow, they need to be kept until they are superseded. ACTION: Record Copy - Print, file, and delete the e-mail. Other Copies - print, delete e-mail, retain until superseded.

### **Other Records**

Other records should be printed, the e-mail destroyed, and the hard copy filed with similar subject or topical matter, or with the associated project.

The OUS General Records Retention Schedule contains approximately 400 records series divided into 21 sections. [Administrative Budgets](#), [Contracts](#), [Curriculum/Instruction](#), [Equipment/Supplies](#), [Facilities/Property](#), [Financial Aid](#), [Fiscal-Accounts](#), [Fiscal-Cash](#), [Fiscal-Payables & Receivables](#), [Grants & Research](#), [Health Services](#), [Information Management](#), [Institutional Services](#), [Intercollegiate Athletics](#), [Libraries, Archives & Museums](#), [Payroll](#), [Personnel](#), [Publications, Promotions & Alumni](#), [Safety & Security](#), and [Student Records](#).

If you have questions about records retention, or would like to schedule an appointment, please contact Ryan Hagemann by e-mail at [Ryan\\_Hagemann@ous.edu](mailto:Ryan_Hagemann@ous.edu)

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