

EMAIL MANAGEMENT



WHY DO WE NEED TO SAVE EMAILS?

- Electronic Communications are preserved as evidence of University functions, policies, decisions, procedures, operations, or other activities of the University, or because of information value and content of the data they contain.



WHAT TYPES OF EMAILS SHOULD BE KEPT?

- Policies and directives
- Correspondence related to official business
- Work schedules
- Meeting agendas and minutes
- Any document that initiates, authorizes or completes a business transaction
- Reports
- Tenure documentation
- Admission documentation
- Search and Screen Documentation

[UW-System General Records Schedules](#)

WHAT EMAILS CAN I DELETE?

If e-mail is considered a Non-Record, delete the e-mail outright.

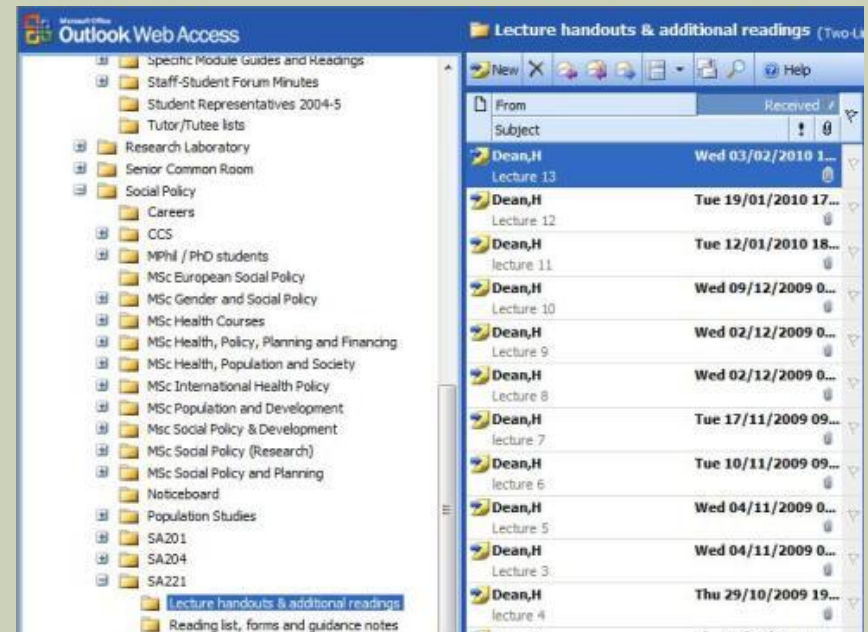
Just as you would sort through your mail at home, you would throw away advertisements, but you would keep the bills.

The following are considered Non-records, under Wis. Stats. §§ 16.61 and 19.35:

- Duplicate records are maintained by a University employee only for convenience or reference and for no other substantive purpose.
- Unsolicited Notices or Invitations. Unsolicited notices or invitations received by a University employee, which are not related to any official action taken, proposed, or considered by the University of Wisconsin-Stevens Point.
- Drafts, Notes, and Preliminary Computations.
- Routing Slips and Envelopes.
- Personal Materials. Personal materials that are purely the personal property of a University employee and that have no relation to his or her office.

HOW CAN I MANAGE MY EMAILS?

- It is the user's responsibility to manage their email messages
- Every email that comes in to the inbox should be deleted or moved to a different folder
- Create a standardized filing system for your emails
- Use consistent naming schemes



ARE THERE GUIDELINES FOR EMAIL RETENTION?

UTILIZE THE BUSINESS COMMUNICATIONS GENERAL RETENTION SCHEDULE FOR ELECTRONIC COMMUNICATION

- RDA #UWBC0001
- Business Communication: Routine
- Retention Period: Retain for six months after a business activity or project is completed.

Routine communication has continuing value as a public record, because it directly connects to the transaction of public business that is conducted by University employees. Routine communication comprises of the normal communication that occurs when university employees, and sometimes their colleagues who are not university employees, work together to transact public business on behalf of the University of Wisconsin System.

ARE THERE GUIDELINES FOR EMAIL RETENTION?

- RDA #UWBC0002
- Business Communication: Transitory
- Retention Period: Retain for seven days or destroy when obsolete because the communication has been superseded or the related event has transpired.

Transitory communication does not establish policies, guidelines, or procedures; certify a transaction; become a receipt; nor perpetuate or formalize business activities of the University of Wisconsin System.

WHAT IS A UW-SYSTEM GENERAL RECORDS SCHEDULE?

- General Records Schedules (GRS) are created by the University of Wisconsin Records Officers Council and approved by the Wisconsin State Public Records Board.
- A GRS is created to ensure that the University of Wisconsin System is properly managing public records in compliance with relevant state and federal laws.
- In the interest of efficiency, records schedules identify categories of records that are common to all University of Wisconsin institutions.

EMAILS MAY FALL UNDER OTHER UW-SYSTEM GENERAL RECORDS SCHEDULES



**KEEP
CALM
AND FIND YOUR
RECORDS
MANAGER**

- E-mail defined as a record, Transitory or Routine, which demonstrates a university transaction or a university action, has retention applied based on the content of the e-mail. Utilize the appropriate General Retention Schedule (GRS) on the Office of General Counsel [website](#).

EMAILS MAY FALL UNDER OTHER UW-SYSTEM GENERAL RECORDS SCHEDULES

Examples that fall under this group of records might include:

- Records documenting the formulation and execution of basic policies and decisions and the taking of necessary actions.
- Records documenting important meetings like a departmental or staff meeting.
- Records facilitating action by agency officials and their successors.
- Records protecting the financial, legal, and other rights of the University and of persons directly affected by the University's actions.

WHO DO I CONTACT FOR MORE INFORMATION?

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