

Email Management



Notes:

Welcome to the training module titled, "Email Management." This training is offered by the State of Michigan, Records Management Services.

- General knowledge of records management responsibilities and retention schedules
 - Basic Records Management class
- General knowledge of email software and desktop computing
 - Office 365 Training Center



Notes:

Records Management Services encourages employees to take the Basic Records Management class prior to taking the Email Management class so they understand their recordkeeping responsibilities, what a record is, how long to keep records, and how Retention and Disposal Schedules help agencies manage their records. This training will not discuss those topics in depth.

In addition, this class assumes that employees have general knowledge of email software and desktop computing. If you need assistance with these topics, training is available online from Microsoft's Office 365 Training Center, located at <http://support.office.com/en-us>.

Good email management will help employees do their job. The objectives of this training are to help you:

- Identify which email needs to be managed to support your job duties
- Understand the retention requirements for email



Notes:

Most employees cannot function effectively at work without email. Unfortunately, email can be challenging to manage. Good email management will help employees do their job. The objectives of this training are to help employees identify which email needs to be managed to support their job duties, and understand the retention requirements for email.

What is a record?

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Records document the performance of government business.

--*Administrative Guide Procedure 0910.01*

Examples include:

- Correspondence about a contract or service
- Payment receipts for office supplies
- Summary meeting notes
- Complaints
- Decisions and authorizations

Notes:

What is a record?

According to [Administrative Guide Procedure 0910.01](#), records document the performance of government business.

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- Payment receipts for office supplies
- Summary meeting notes
- Complaints
- Decisions and authorizations

Who owns the records?

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- Records are owned by government offices, not individual employees
- Records need to be kept in a place that can be accessed by all authorized office employees
- However, email accounts are only accessible to the user, not the office




Notes:

Who owns government records? Records are owned by government offices, not individual employees. Records need to be kept in a place that can be accessed by all authorized office employees. However, email accounts are only accessible to the user, not the office.

Why do you need to manage email?

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- Email is a record 
- File email in the office's shared filing system, like a document management system, if available
- If the office does not have a shared filing system, organize email
 - Ensure easy retrieval
 - Destroy email according to Retention and Disposal Schedules



Notes:



Why do you need to manage email? Email is a record. Outlook is software that sends and receives messages. Outlook should not be used to store messages.

Email should be stored in the office's designated filing system for the business process, alongside other records that document the same activities, so you only need to look one place to find the stuff you need. Electronic document management systems can help agencies centralize the filing of email and other electronic records.

If the office does not have a shared filing system, employees should still organize their email to ensure easy retrieval of information, and to assist with the destruction of email that has met its retention period according to Retention and Disposal Schedules.

How does this impact you?

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- You need to be able to access email to do your job 
- If you keep too much email, it is harder to find what you are looking for
- Email accounts of former employees need to be reviewed before they are closed so important records are not lost 

Who? Me?



Notes:


How does this impact you? You need to be able to access email to do your job. If the email you need to do your job are in your co-worker's account, you can't access it, especially if the co-worker is not in the office. Shared email mailboxes can be useful when multiple people share job duties. If you keep too much email, it is harder to find what you are looking for. Email accounts of former employees need to be reviewed before they are closed so important records are not lost. If everyone keeps a clean email account, this won't be a big problem.

Which email should you keep?

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You are responsible for recordkeeping if you are:

- The lead worker for an activity
- Chosen by a team to keep the team's records
- Responsible for maintaining the files for a specific office function

If you are not sure what to keep, talk to your supervisor. 



Notes:

Which email should you keep?

Email messages need to be retained when they document decisions and activities of your office, or when they document guidance or services provided by your office.

You are responsible for recordkeeping if you are the lead worker for an activity or project, if you are chosen by a team to keep the team's records, or if you are responsible for maintaining the files for a specific office function.

Office procedures or your supervisor may inform you about your recordkeeping responsibilities. If not, ask your supervisor for clarification. Supervisors are responsible for ensuring employees know where to file records, ensuring employees use the office's filing systems consistently, knowing the office's records Retention and Disposal Schedule, and following the schedule.

Where should you keep email?

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- Email should be kept with other records that document the activity or project, when possible
- Ensure recordkeeping is consistent among all office employees
- If you don't know where to file email, ask your supervisor



Notes:

Where should you keep email?

Email should be kept with other records that document the activity or project, when possible. For example, licensing files should contain all information that the office has about a licensee. An email complaint about a licensee, should be filed with the licensee's application and evaluation documents. The licensing file should be accessible to everyone in the office who works with licensees and should be used consistently by everyone in the office. This helps employees to perform their jobs efficiently, regardless of who is in the office on a particular day. If you don't know where to file email, ask your supervisor.

How long do you need to keep email?

10/20

Records Retention and Disposal Schedules define how long records, including email, are kept

- Not all records are equal
 - Some have short-term value
 - Some have long-term value

Schedules provide the legal authorization to destroy records 

- Schedules are available online




Notes:

How long do you need to keep email? Records Retention and Disposal Schedules define how long records, including email, are kept. Not all records are equal, some have short-term value, and some have long-term value.

Schedules provide the legal authorization to destroy records. If a record is not listed on a schedule, it cannot be destroyed, it must be kept permanently. Contact your department's Records Management Officer (RMO), if you need to add records to a schedule. A list of RMOs and the approved schedules are available online at <https://inside.michigan.gov/recordsmanagement>.

What is the retention period for email?

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- There is not a single retention period for all email
- Retention period depends upon the message 
- Examples: if the message is about ...
 - Contracts - keep as long as all other contract records
 - Personnel - keep as long as all other personnel records



Notes:

What is the retention period for email? There is not a single retention period for all email.


Just like there is not a single retention period for all paper. The retention period depends upon the content of the message, and the business process it supports.

A lot of email has short retention periods:

- Junk mail and mass mailings (like Gongwer), should be deleted right away (according to the general schedule for non-records).
- General Correspondence needs to be kept for 2 years (according to the general schedule for administrative records).
- More examples:
- If an email message is related to contracts, it needs to be kept as long as all other contract records
- If an email message is about a personnel issue, it needs to be kept as long as all other personnel records.

Don't Feel Overwhelmed

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- Know the retention period for the records you are responsible for filing and maintaining
 - Most employees are responsible for only a few types of records
- Identify the maximum retention period for your email
 - Delete all email older than that timeframe
 - Clean up your email account at least once a year 

Notes:


Don't feel overwhelmed:

Typically, employees are responsible for filing and maintaining only a few different types of records on a regular basis to support their own job duties. If each employee knows the retention period for those specific records, they can consistently manage the records.

If you can identify the maximum retention period for the records you are responsible for maintaining, then you can delete all email older than that timeframe. You should clean up your email account at least once each year. Note: confirm that none of the email needs to be kept for FOIA or litigation prior to deleting it.

Read it and Delete it!

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Don't let the following types of messages waste space in your email account: 

- Publications from outside sources
- Personal documents
- Mass mailings
- Reminders
- Spam, advertisements and junk mail



Notes:

Read it and Delete it!

Don't let the following types of messages waste space in your email account: publications from outside sources (such as newsletters), personal documents (such as family, personal finances, friends, entertainment, shopping), mass mailings that you receive (or any time you are copied on a message just for informational purposes), reminders, spam, advertisements, and junk mail. The *General Schedule for Non-record Materials* authorizes the destruction of these types of email. It is available online at <https://inside.michigan.gov/recordsmanagement>.

The following are examples of 4 different email messages. Please read the messages and click on the appropriate button if you think the message should be retained or deleted.



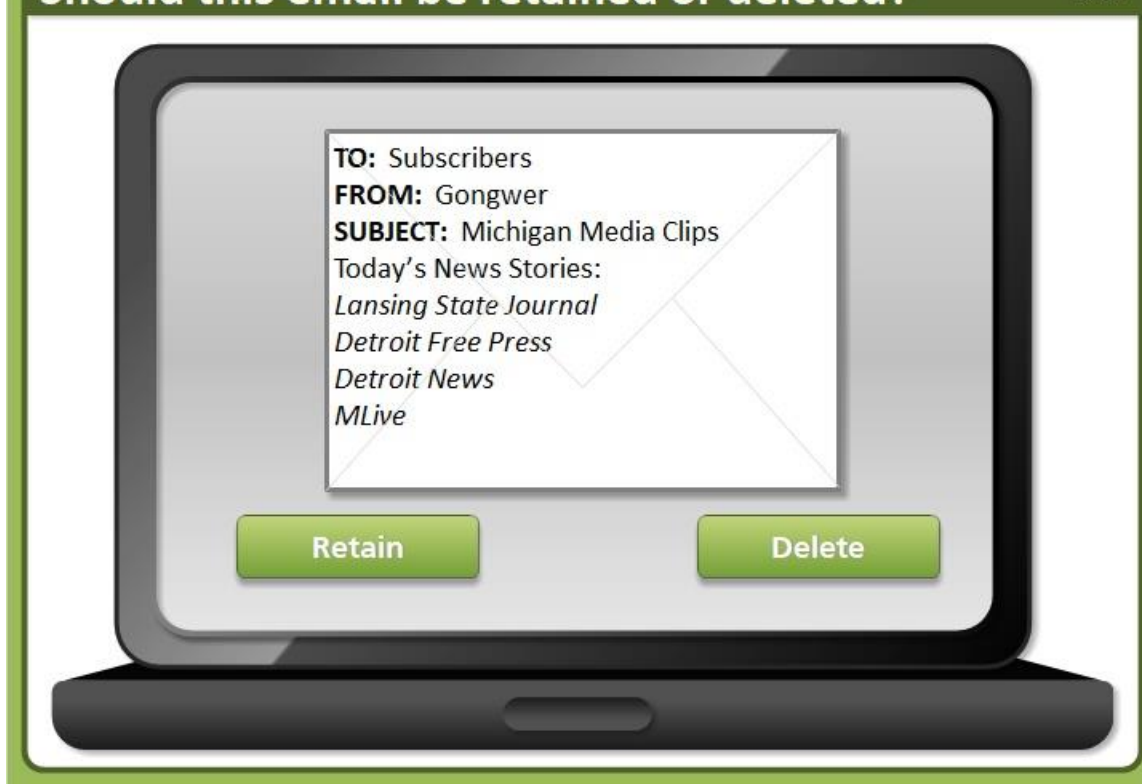
Notes:

Training Exercise:

The following are examples of 4 different email messages. Please read the messages and click on the appropriate button if you think the message should be retained or deleted.

Should this email be retained or deleted?

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Notes:

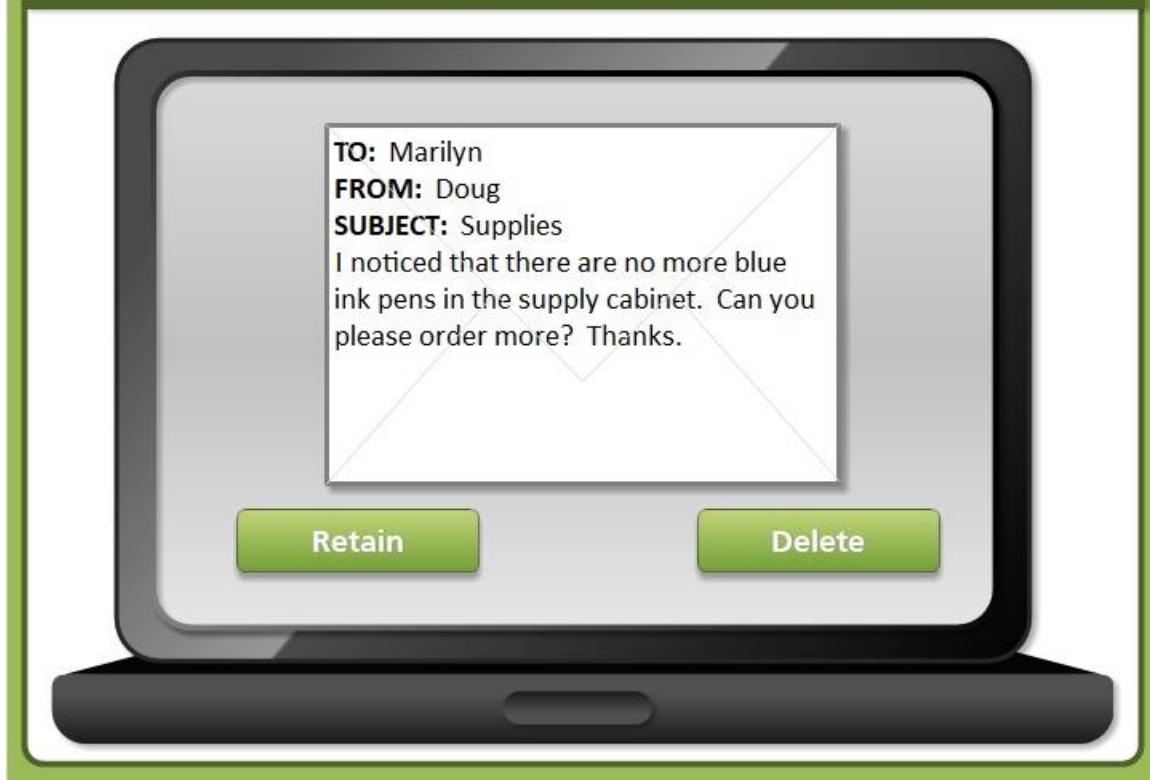
Should this email be retained or deleted?

"Gongwer Michigan Media Clips. Today's News Stories ..."

The correct answer is: This message does not document the activities of your office. It contains reference information that can be deleted after it is read.

Should this email be retained or deleted?

16/20



Notes:

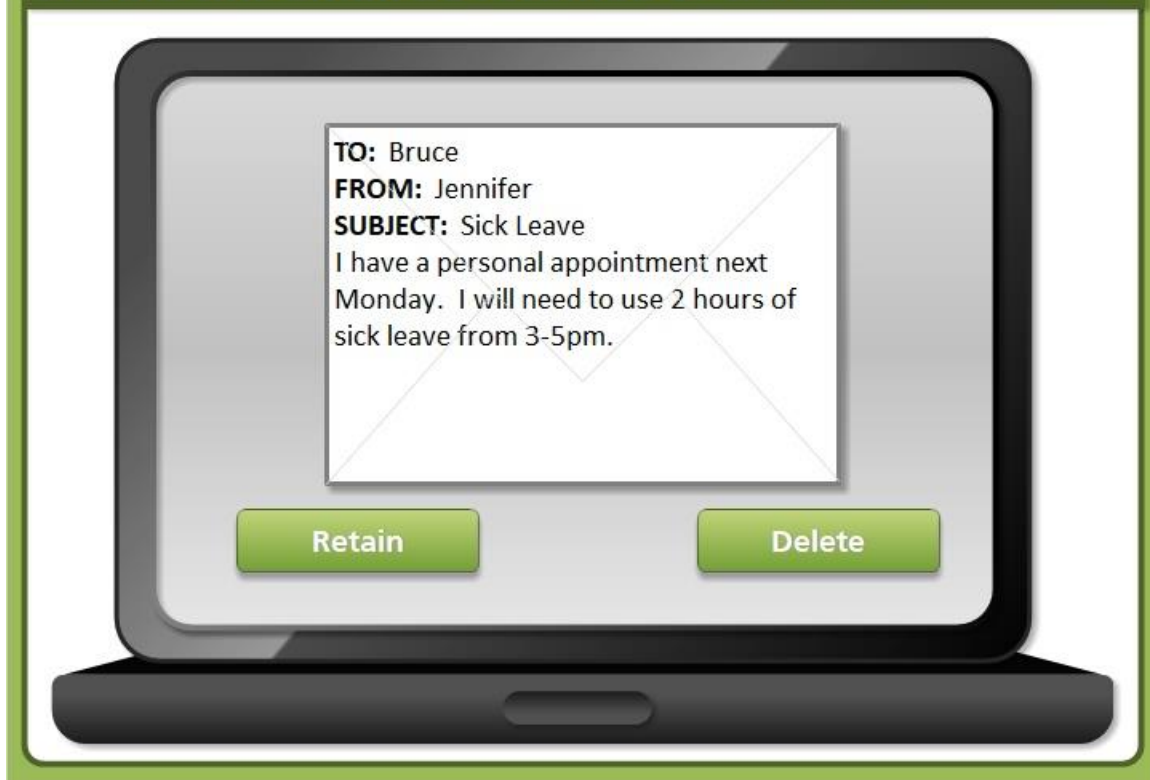
Should this email be retained or deleted?

"I noticed that there are no more blue ink pens in the supply cabinet. Can you please order more? Thanks."

The correct answer is: This email can be deleted. Once Marilyn orders more pens, the purchase order becomes the official record that documents this activity.

Should this email be retained or deleted?

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Notes:

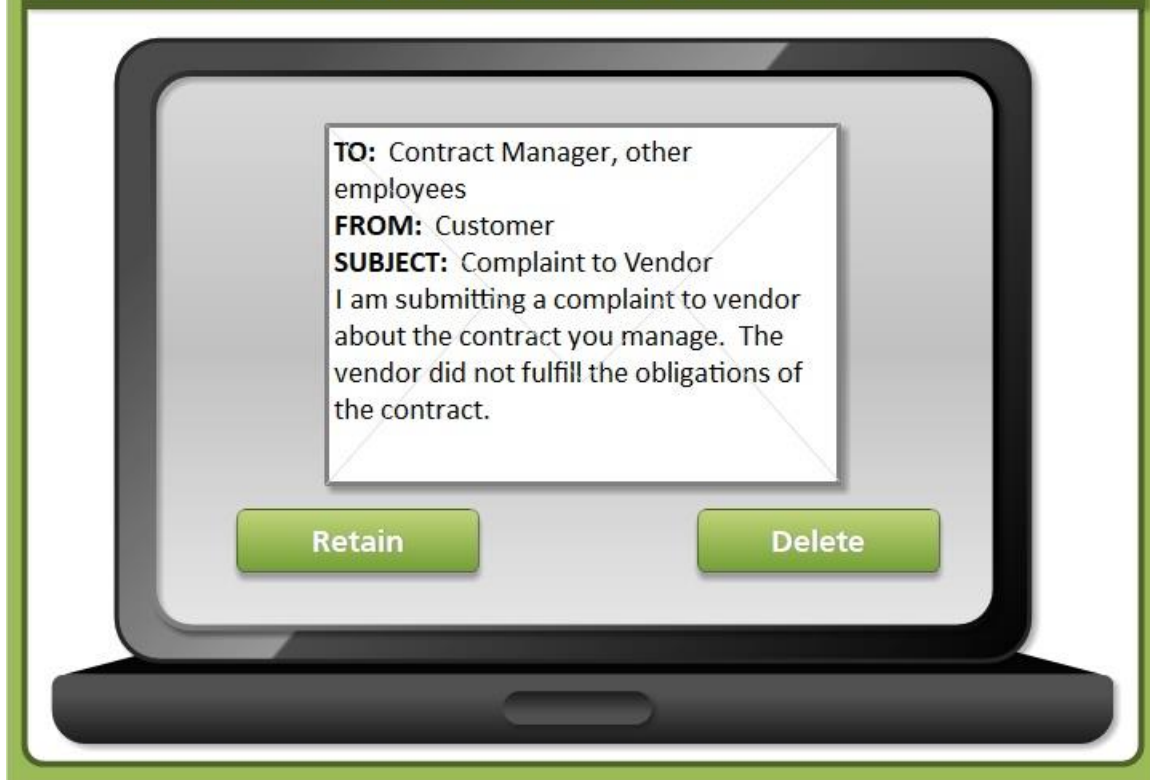
Should this email be retained or deleted?

"Sick Leave: I have a personal appointment next Monday. I will need to use 2 hours of sick leave from 3-5pm."

The correct answer is: This email documents the use of sick leave. It should be retained by both the sender and the recipient until the leave time is entering into the official timekeeping system. If the message contains essential information that is not entered into the timekeeping system, it needs to be kept for 5 years, according to the General Schedule for Human Resources Records.

Should this email be retained or deleted?

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Notes:

Should this email be retained or deleted?

"I am submitting a complaint to vendor about the contract you manage. The vendor did not fulfill the obligations of the contract."

The correct answer is: According to the General Schedule for Procurement Records, this message needs to be kept by the contract manager until the contract expires, and the final payment is made, plus 6 years. Most of the other people copied on the message do not need to keep it.

- Do you have too much stuff in your account?
- Do you want some tips about how to clean up your email account, and keep it clean?
- Check out [*Email Organization training*](#), offered by Records Management Services



Notes:

It's clean-up time!

Do you have too much stuff in your email account? Do you want some tips about how to clean up your email account, and keep it clean? Check out the training, [Email Organization](#), offered by Records Management Services.

Please visit the
Records Management Services'
website for more information.
Thank you.

Find Records Management online at
inside.michigan.gov/recordsmanagement



Exit Class

Notes:

Need Assistance?

Please visit the Records Management Services' website for more information. Thank you.
Find Records Management online at <https://inside.michigan.gov/recordsmanagement>.