

TIPS FOR Managing Email

USING A TASK-BASED APPROACH TO EMAIL MANAGEMENT

The Library of Virginia's records retention guidance for correspondence generally focuses on the correspondent's role in the organization. Overall, those in upper administrative roles have more specific guidance than most other employees. The correspondence of "agency heads" and "department or division heads" and "other officials" is covered in dedicated records series, but most university employees are covered under:

101-012019: Correspondence/Subject Files: Routine, Administrative - Not Specified Elsewhere

This series consists of incoming and outgoing letters, memorandum, faxes, notes and their attachments of a routine administrative nature, not listed on an agency specific schedule, in any physical format including, but not limited to, paper and e-mail.

Retention: Retain until after no longer administratively useful

Disposition: Non-confidential Destruction

MAPPING YOUR DAILY TASKS TO RETENTION GUIDANCE

For most university employees, the administrative utility of your correspondence determines how long it should be retained. In these cases, there is not a mandate to preserve files based on a specific administrative position identified in the records schedules. But we do have guidance for retaining specific types of files created as part of an employee's job duties. For example, someone who assists university personnel in making purchases might want to consider the following retention series:

102-200114: Purchasing Records

This series documents the purchasing of equipment, goods, services, and supplies by the agency. This series may include, but is not limited to: bids, bid proposals, contracts, agreements, purchase orders, and requisitions.

Retention: Retain 5 year(s) after end of state fiscal year

Disposition: Confidential Destruction

While this series does not explicitly mention correspondence, we can still use it as a guideline for email management. In this case, an employee could look at the series and decide to keep at least their most recent 5 years of correspondence. At the end of the 5 years, the administrative utility of that correspondence would be over, and it would be acceptable to delete the messages.

For this particular example, please note that the university's online central purchasing system would act as the official system of record. The associated correspondence is not being singled out as an official record of a purchase, it is only being used as an example of messages with *potentially* identifiable and actionable administrative utility.

IDENTIFY ADMINISTRATIVE VALUE FOR YOUR EMAIL

We can attempt to assess the entirety of an email account, sorting through messages and classifying them based on content. But if the emails were not tagged or sorted at the time of creation, this can be a very difficult and time-consuming process. Software tools are available to facilitate this sort of email management, but a task-based approach to determining the ongoing value of email can also be useful when sufficient time and resources are not available to deploy extensive or automated solutions.

So, when attempting to identify and manage email as an official university record, one way to begin is by consulting the records schedules with your own job duties and daily tasks in mind. The official [college and university schedule](#) is a good place to start (you can also access all of the general state agency records series [here](#)). Consider whether or not your email is a useful or necessary aid for administering a specific university function which is also part of your core job duties. And use the Library of Virginia's records retention schedules to determine exactly how long that administrative need is expected to last.

COMPLETE A CERTIFICATE OF RECORDS DESTRUCTION

Remember that University Policy 2000 and the Virginia Public Records Act call for official records destruction to be documented on a Certificate of Records Destruction form. The CRD must be completed and approved together by the departmental records coordinator and the Director of Records Management. Please use our destruction certificate [web form](#) to begin the destruction certification process, and contact us at recmgmt@vt.edu if you need help identifying your departmental records coordinator.