



## **Email Record Retention Cheat Sheet**

As part of the ongoing tightening of our IT policies and systems, our electronic record retention practices are also changing. Part of this is a rolling one year cut off on saved emails. This policy and ongoing practice will be rolled out to all staff in mid-October of 2022. We want to offer everyone time to go through their emails prior to that period and save important communication and documents, so we are discussing this oncoming change now.

Below are some tips and suggestions for how to go through your email. **Not every email needs to be saved!**

### **Dos:**

- **Touch base with your director or manager on where all important communications should be saved. As a general rule, the G: Drive will have a folder for each program with sub folders for departments/projects and years.**
- **Work with your larger team to identify who will be saving documentation that was sent to a larger CEO group to avoid duplication.**
- **Prioritize filtering your inbox by funding source, or emails that contain an attachment to identify some of the most important to save communications.**
- **Work with your immediate team to make a plan for going through shared emails, such as [marketing@ceoempowers.org](mailto:marketing@ceoempowers.org), [hr@ceoempowers.org](mailto:hr@ceoempowers.org), etc.**
- **There are two good ways to save communications that are within the body of the email:**
  - **Print to PDF to save the full body of the email as a PDF**
  - **Use the Snip & Sketch tool to take a screenshot of the body of the email and save as a .jpg**
- **Don't forget to add people to your contacts to save their email, phone number, and other important information in a more permanent manner.**
- **Make sure you review emails in all of your email folders.**

### **Don'ts:**

- **Do not save important documentation and communication on your P: Drive, desktop, or downloads/documents file of your computer.**
- **Avoid duplicating other departmental documentation. For example, don't save POs to the G Drive as Fiscal already has a copy and process for saving these.**

- ***Do not save email documentation as an Outlook file to the G: Drive***
- ***Don't forget that this will be an ongoing effort to be maintained. The one year cut off is rolling, so get in the habit of processing/saving emails as they come in.***

Thank you for your cooperation, this will be an ongoing effort, but we are hopeful that it will keep the agency safer long term.