

# San Diego State University

## Electronic Mail (E-mail) Retention Policy

### Purpose

This policy specifies the requirements and expectations of employees in maintaining their Electronic Mail; specifies default retention periods for Electronic Mail retained on active servers; and establishes roles and responsibilities for implementation of the policy, including management of litigation holds.

### Scope

The Electronic Mail (E-mail) Retention Policy applies to all employees of San Diego State University and its Auxiliary Organizations and applies to all E-mail that is sent or received in the transaction of University or public business.

### Retention Requirement

The retention requirement for E-mail is determined by the **content** of the communication, and not the medium. The legal custodian of retained E-mail messages is determined by the subject matter. A list of campus records custodians may be found in San Diego State University's Records Retention Policy.<sup>1</sup> Retained E-mail may also be defined as "Public Record"<sup>2</sup> and may be subject to inspection at any time. Careful consideration must be given to retention of E-mail.

For retention purposes, E-mail is separated into two broad categories:

#### Transitory Communication

E-mail received or sent which has **little or no lasting operational, legal, fiscal, or historical value** to San Diego State University's programs, administration, or operations should not be retained and should be deleted as soon as they no longer serve an administrative purpose. These might include casual communications, meeting date and time reminders, or notices of campus events.

**Retention Period:** Until read

**Disposal Method:** Delete from desktop E-mail folders and Webmail when they no longer serve an administrative purpose, and empty **Trash**<sup>3</sup> upon closing an E-mail session.  
*Ensure E-mail attachments that are transitory in nature are also deleted.*<sup>4</sup>

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<sup>1</sup> San Diego State University's Records Retention Policy may be found at <http://bfa.sdsu.edu/policies/>.

<sup>2</sup> "Public Record" includes all communications related to public business regardless of physical form or characteristics, including any writing, picture, sound, or symbol, whether paper, electronic, magnetic or other media. California Public Records Act, GOVT. CODE §§ 6250 - 6276.48.

<sup>3</sup> Deleted E-mail from folders is stored in the desktop E-mail client software or within Webmail in the **Trash** folder. To ensure the **Trash** folder is emptied daily, your E-mail client software should be configured to "delete upon exiting" the program.

<sup>4</sup> E-mail attachments opened on a desktop may be automatically saved to a default location, whether you intend to save or not. Consult your department IT personnel for procedures to minimize retention of attachments on desktops.

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### Official Record

E-mail sent or received which has ***lasting operational, legal, fiscal, or historical value*** to San Diego State University's programs, administration, or operations should be retained in accordance with San Diego State University's Records Retention Policy. These might include interpretations of University policies or regulations which may be the only record of a subject matter. These messages must be transferred to another medium and also filed with the custodian of record, permitting E-mail records to be purged at regular intervals<sup>5</sup> from campus servers or daily from Trash folders on campus desktops and Webmail.

**Retention Period:** According to San Diego State University's Records Retention Policy

**Retention Method:** Hard copy or alternate medium.

### Litigation Holds

When litigation against the University or its employees is filed or threatened, the law imposes a duty upon the University to preserve all documents and records that pertain to the issues. When University Counsel is made aware of pending or threatened litigation, a litigation hold directive will be issued to the custodian of record.

A litigation hold directive overrides this E-mail policy, as well as any records retention schedules that may have otherwise called for the transfer, disposal or destruction of relevant documents, until the hold has been cleared by University Counsel.

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<sup>5</sup> E-mail is purged from campus servers after 14 days. *The 14-day retention period is for disaster recovery purposes only.*