E-mail Retention Guidelines

The Virginia Public Records Act stipulates the content of a record, not the format, determines how long a record should be retained. This rule applies to George Mason University faculty and staff e-mail. Therefore, there is no simple cutoff date to determine if an e-mail needs to be migrated to Microsoft Office 365. However, identifying faculty and staff e-mail as records or nonrecords helps to determine if an e-mail should be migrated. If there is any uncertainty, it is better to error on the side of caution and migrate the e-mail.

E-mail Nonrecords

E-mail nonrecords do not need to be migrated to Microsoft Office 365. E-mail nonrecords include:

- Received and sent e-mails not related to George Mason University business such as coordinating a holiday party or arranging lunch with a coworker.
- Received e-mails pertaining to George Mason University business that require no action such as listserv messages or e-mails received via carbon copy.
- Received and sent e-mails containing a duplicate George Mason University record. The original record is found elsewhere. For example, an e-mail with an attached budget spreadsheet that is also saved on the departmental shared drive.

E-mail nonrecords should be deleted on a regular basis, as soon as they are no longer needed. E-mail nonrecords may be deleted without notifying the University Records Manager.

E-mail Records

E-mail records need to be migrated to Microsoft Office 365 if retention schedules have not expired. E-mail records with expired retention schedules, may be deleted after the University Records Manager grants permission through a Certificate of Records Destruction form.

E-mails are most frequently categorized as correspondence, which is covered under Library of Virginia Retention Schedule 101. In Retention Schedule 101, the Library of Virginia describes nine types of correspondence. Here are the types of e-mail correspondence that faculty and staff are most likely to have:

- Received and sent e-mail correspondence that is routine or administrative only needs to be retained as long as administratively necessary. This type of e-mail correspondence may be deleted without notifying the University Records Manager.
- Received and sent e-mail correspondence to and from department or division heads needs to be retained for 3 years.
- Received and sent e-mail correspondence to and from other officials needs to be retained for 2 years.

For e-mail records that are not classified as correspondence, review the appropriate retention schedule to determine the applicable retention period or consult with the University Records Manager. Here is a list of the Library of Virginia retention schedules for state agencies:
http://www.lva.virginia.gov/agencies/records/sched_state/index.htm

For more information please consult the Library of Virginia E-mail Management Guidelines:

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