

Effective Date: 6/28/2005  
Revised Date: 9/11/2017  
Review Date: 9/11/2017

## North Sound Behavioral Health Organization

### Section 4000 – Information Systems: Email Retention

Authorizing Source: North Sound BHO

Cancels:

See Also:

Responsible Staff: IS Specialist

Approved by: Executive Director

Signature:

Date: 10/3/2017

## POLICY #4006.00

### SUBJECT: EMAIL RETENTION

#### POLICY

North Sound Behavioral Health Organization (North Sound BHO) provides email capabilities to facilitate communication. Some email correspondence needs to be retained for certain periods of time. Aspects of email retention are handled by the email server and via backup technologies; while other aspects are handled by the users of the system.

#### A. User Responsibility

As each user of the email system knows their email correspondence the best, users are held with the primary responsibility of retaining their email correspondence that needs to be retained. This applies to email correspondence that is both sent, as well as, received.

1. Each user has a folder named 'Email\_Archive' in their 'My Documents' folder. This folder is provided as a suggested location for staff to save their email correspondence to be retained. If, within their own 'My Documents' folder, there is another folder that is more appropriate for the user to save their email correspondence, this policy is not meant to prevent that from occurring.
2. Users shall not save their email correspondence in a shared location (e.g., Departments, Shared, etc.)
3. The recommended format to save the email correspondence to be retained is 'Outlook Message Format'. Steps to save in this format:
  - a. From the Microsoft Outlook® email client, select the email message you want to save.
  - b. Click File menu -> Save As...
  - c. In the 'Save As' dialog box, navigate to your 'Email\_Archive' folder (or other folder in your 'My Documents' folder).
  - d. Provide a file name in the 'File name:' box. By default, this will be populated with the subject of the email message you are saving. It would be a good idea to include a date (such as the date the message was sent) as a part of the file name.
  - e. In the 'Save as type:' drop-down list, select 'Outlook Message Format (\*.msg)'
  - f. Click the 'Save' button.

- Each user will double-check the messages that were moved to the 'Deleted Items' folder after receiving notification that the 'Mailbox Manager' has been run from the 'System Attendant' to ensure none of those messages need to be retained per the steps outlined above.

**B. IS/IT Department Responsibility**

- Maintain and monitor network system backups per North Sound BHO's Backup Policy.
- Maintain and monitor the 'Mailbox Management' process. The 'Mailbox Management' process runs every Sunday at midnight and moves email messages to the 'Deleted Items' folder per the following table:

<b>Folder</b>	<b>Age (days)</b>
Inbox	120
Sent Items	90
Deleted Items	60
All other mail folders	30

After the 'Mailbox Management' process has been run, notification will be sent to the user that their mailbox has been processed.

- Provide assistance to users on how to save their email correspondence.

**ATTACHMENTS**

None