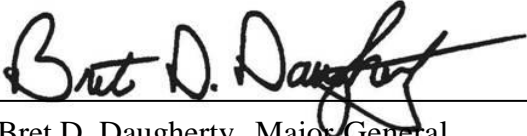


August 10, 2018



## Department Policy No. DIR-005c-13

<b>Title:</b>	Email and Calendar Items
<b>Authorizing Source:</b>	<a href="#">Title 40 RCW</a> , <a href="#">Ch. 434-610 WAC</a> , <a href="#">Ch. 434-615 WAC</a> , <a href="#">Ch. 434-626 WAC</a> , <a href="#">Ch. 434-640 WAC</a> , <a href="#">Ch. 434-662 WAC</a> , <a href="#">Ch. 434-663 WAC</a> , <a href="#">Ch. 434-677 WAC</a> , and <a href="#">Ch. 434-690 WAC</a>
<b>References:</b>	DIR-005-08, WMD Form 0009-13, WMD Form 0011-13
<b>Information Contact:</b>	Washington Military Department Records Officer Building 1 (253) 512-8108
<b>Effective Date:</b>	September 11, 2013
<b>Mandatory Review Date:</b>	August 10, 2022
<b>Revised:</b>	August 10, 2018
<b>Approved By:</b>	 <hr/> Bret D. Daugherty, Major General The Adjutant General Washington Military Department Director

### Purpose

To ensure that Washington Military Department (WMD) email and calendar items are preserved, stored, retained, transferred, destroyed, and disposed of in accordance with Washington State law, administrative codes, and Secretary of State Guidelines.

### Scope

This policy applies to all WMD email and calendar items that are created, received, or maintained by the WMD in connection with the transaction of public business. Any WMD employee or volunteer who creates, receives, or maintains WMD email and calendar items must comply with this policy.

### Policy

Emails and calendar items are subject to the same records retention requirements that apply to any other electronic or non-electronic records. The retention period for an email or calendar item is based upon its content according to the General Records Retention Schedule or the WMD Unique Records Retention Schedule.

Email and calendar items shall be managed in accordance with these guidelines, except in cases of a legal, public records request, audit, or other hold on the records:

**A. Email and Calendar Items with Minimal Retention Value (Transitory Records)**

1. Users shall delete email and calendar items with minimal retention value (see Section 6. of the State Government General Records Retention Schedule) that are created, sent, or received.
2. Users may retain email and calendar items with minimal retention value if the email or calendar item is being used as a reference or continues to serve a business purpose.

**B. Email and Calendar Items with a Retention Period of 30 or More Days**

Users shall review the General Records Retention Schedule and WMD Unique Records Retention Schedule to become familiar with each record series the User works with. Just like paper records and other electronic records, email and calendar items are based on the function/content of the record and considered as correspondence and communication in the description of a records series.

**C. Draft Email**

1. The “Drafts” folder is intended for temporary storage of email drafts only, and may not be used for any other purpose.
2. Users must review the contents of this folder and delete unneeded drafts on a frequent basis.

**D. Email in the “Deleted Items” Folder**

1. The “Deleted Items” folder is intended for temporary storage of deleted items, and may not be used for any other purpose.
2. Users must empty the contents of the “Deleted Items” folder either upon exiting Outlook or on a frequent basis to keep this folder’s contents at a minimum.

**E. Personal Storage Files (PST)**

1. Users may not create PST files unless they have been approved by their division director or designee, and the WMD Records Officer, to do so for an approved purpose or a specific business function.
  - a) Approved purposes include, but are not limited to, fulfilling public records requests, completing management-directed audits, or complying with requests by or requirements of the Attorney General’s Office, State Auditor’s Office, Secretary of State’s Office, or another agency performing an audit, regulatory, administrative, or similar duty.
2. To request the ability to create PST files, a User shall complete WMD Form 0009-13 and submit it to their Division Director or designee. If approved, the Division Director or designee will submit the form to the WMD Records Officer for IT coordination and approval.

**F. Legal Holds on Email or Calendar Items**

1. The Public Records Officer or designee, and the Risk Manager or designee, have the authority to place a hold on the expiration of email or calendar items subject to an open public records request or pending or anticipated litigation, and to remove that hold when the request is complete or all legal actions are final.
2. If a hold on email or calendar items exists, the Public Records Officer or designee will, to the extent necessary:
  - a) Perform searches of email and calendar items through Microsoft Office 365 software and place a hold on certain search results to suspend expiration of those emails and calendar items.