

**GENERAL RECORDS RETENTION SCHEDULE FOR  
HEALTH DISTRICTS**

**Records Category: ELECTRONIC INFORMATION - GENERAL**

**DATA AND INPUT DOCUMENTATION**

**DATABASE AND SPREADSHEET DATA**  
**FINDING AIDS AND INDEXES (USER WORKING COPY)**  
**INPUT DOCUMENTS**  
**WORD PROCESSING FILES**

Primary record copies of completed drafts and documents should be filed with the appropriate records series and retained in hard copy or electronic form according to the minimum retention periods approved by the Local Records Committee for those records series.  
 User and other secondary copies should be destroyed when obsolete or superseded. The appropriate Disposition Authority Number (DAN) should be referenced when documenting the disposal of public record information regardless of the medium or format in which it is stored.

**ELECTRONIC MAIL**

Electronic mail (E-mail) is primarily a communication system. Individual E-mail messages may be public records with legally mandated retention requirements, or may be information with no retention value. E-mail messages are public records when they are created or received in the transaction of public business and retained as evidence of official policies, actions, decisions, or transactions. Such messages must be identified, filed, and retained just like records in other format.

Currently few E-mail systems are designed to categorize and retain information. E-mail messages with public record content should be retained in E-mail format only as long as they are being worked on or distributed. Upon completion, E-mail messages containing public record information need to be retained for the length of retention period per the appropriate records series assigned by the Local Government General Records Retention Schedule or a records retention schedule approved specifically for the agency by the Local Records Committee.

**E-MAIL MESSAGES WHICH ARE USUALLY PUBLIC RECORDS AND MUST MEET RECORDS RETENTION REQUIREMENTS BEFORE BEING DESTROYED:**

- Policy and Procedure Directives
- Correspondence or memoranda related to official public business
- Agendas and minutes of meetings
- Documents relating to legal or audit issues
- Messages which document agency actions, decisions, operations and responsibilities
- Documents that initiate, authorize or complete a business transaction
- Drafts of documents that are circulated for comment or approval
- Final reports or recommendations
- Appointment calendars
- E-mail distribution lists
- Routine information requests
- Other messages sent or received that relate to the transaction of local government business

**E-MAIL MESSAGES WHICH ARE USUALLY ADMINISTRATIVE MATERIALS WITH NO RETENTION VALUE:**

- Information-only copies, or extracts of documents distributed for reference or convenience, such as announcements or bulletins
- Phone message slips that do not contain information that may constitute a public record
- Copies of published materials
- Informational copies
- Preliminary drafts
- Routing slips
- Transmittals (Letters/memos)

**SUPERSEDED**