

## PURPOSE

The purpose of this **e-mail** policy is to familiarize the Executive Board and the various Committees Chairs with the proper procedure for transferring and storing electronic files. A clear understanding of the Policy will ensure a more effective transfer of files whether it is between Committee Chairs or Executive Board members.

## INTRODUCTION

Sending, receiving, and creating documents and information electronically have become the norm. A record can take many forms, e.g., electronic data, microfilm, or paper. A written **e-mail** policy that addresses access, use and transfer of electronic files by **e-mail** will establish rights and responsibilities of the OAMR Executive Board and Committee Chairs responsible for implementing this policy.

## POLICY AWARENESS

A written policy should cover all aspects of electronic files, including access, retention, and transfer.

## TRAINING

Training is a crucial part of policy awareness and compliance and should be created for the Executive Board and Committee Chair. The policy training will be performed by the Records Management Committee Chair person or designee at an Executive Board meeting. The policy will be sent to the OAMR President for inclusion in the Executive Board meeting packets to allow time for advance review. All Executive Board and Committee Chairs should be aware of this policy, and will be given a copy of this policy upon taking office, and attend training annually.

## ELECTRONIC FILING SYSTEMS

The first option is retaining **e-mail** messages electronically. The **e-mail** system may already be set up to store and retain messages for a limited period of time, or the system may be set up to transfer the messages from the **e-mail** system to some other type of electronic storage system. Other methods of electronic filing systems require the user to convert the messages to a text file and then store that text file in another system. Whatever the electronic system may be, there can be limitations:

- The need for development of a migration plan to ensure messages are accessible until the retention period has been met.
- A system for deleting messages once the retention period has been met must be developed.

## STORAGE AND PERSEVERATION OF E-MAIL MESSAGES

Retention strategies for **e-mail** messages may include:

- Maintaining the message in an electronic format on a reliable storage media.
- Printing out paper copies.

Saving records to a hard drive is not a viable preservation strategy, since work can be destroyed by a virus, exposure to moisture or temperatures extremes or disc defect.

A distinction should be made between security backups and long-term storage. Security back-up procedures do not constitute a long-term storage plan. Backup tapes serve as a security copy in the event of disaster or large data loss and do not provide a way to search records or to maintain complex links between records.

### **RESPONSIBILITIES OF THE COMMITTEE CHAIR**

It is the responsibility of each Committee Chair to ensure all electronic files stored on individual computers are backed up on a CD or other media approved by the Executive Board and stored in a safe climate controlled location. All correspondence between individual Committee Chairs and their committees is to be stored on individual computers and transferred to an approved medium for backup.

Prior to leaving office, the Committee Chair shall transfer electronic files to an approved medium for storage, print a hard copy and transfer the files to the OAMR Secretary. Once a Committee Chair has been appointed to fill the position, these electronic files and the hard copy will be forwarded to the new Committee Chair. Should the assumption of duties by the new Chair immediately follow the term of the current Chair, the records transfer can be made directly to the new Chair rather than to the Secretary.