

## ***For the Record***

The Quarterly Records Management  
Newsletter for the State of Maryland

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### **Retention Schedule Specifics: Index**

Having trouble understanding what an index is? You are not alone; many schedule preparers struggle with this. We are here to help!

An index is an ordered list of headings that points to relevant information in materials that are organized in a different order. Typically, an index is necessary for being able to find a record within a record series.

Indexes permit a user to input some piece of information and see all other information associated with that file. For example, case files are often arranged numerically; if a user did not know the case number but knew an associated name, they could look up the name in the index so that they could find the case file without a hassle.

Don't forget that an index is a record too and must be included in a records retention and disposal schedule!

## **We're Back!**

### ***For the Record Returns***

After a three-year hiatus, the State of Maryland's Records Management newsletter revitalizes and is ready to inform Records Officers and fellow administrative staff on the latest updates and changes regarding records management.

*For the Record* is brought to you by the Department of General Services, Records Management Division and the Maryland State Archives. Its goal is to provide insight into records management in a clear and efficient manner.

***Did you know that under State Government Article 10-633, each unit of State Government must have a program for the continual, economical, and efficient management of the records of the unit?***



**Heads Up → Records Management Training will be held throughout Maryland between June-October 2019. Expect an email soon with more information about locations, dates, and registration.**

# Do I Really Need to Save an Email?

## Tips and Tricks for Email Retention

It can be difficult to determine how long to retain emails because they contain a variety of information. It might be easier to manage your agency email if you categorize it. Here are some suggestions for categorizing your email, along with proposed retention lengths.

### **Group 1: Transitory Correspondence**

These are incoming and outgoing correspondence related to matters of short term interest.

Example: Transmittal correspondence between individuals, departments or external parties containing no final contractual, financial or policy information.

This correspondence does not impact agency functions. When resolved, there is no further use or purpose.

Retention: Retain until administrative need ends and then destroy.

### **Group 2: Administrative Correspondence**

These are incoming and outgoing business-related correspondence created in the course of administering agency functions and programs.

Example: Administrative correspondence documents, work assigned, work accomplished, transactions made or actions taken.

This correspondence documents the implementation of agency functions rather than the creation of functions or policies.

Business-related correspondence that is essential to a core function of another series should follow the retention period for that series.

Retention: Retain for [x] years and then destroy.

### **Group 3: Executive Correspondence**

These are incoming and outgoing non-transitory, business-related correspondence of the director or executive. These records document executive decisions made regarding agency interests and provide unique information relating to the functions, policies, procedures or programs of an agency.

Retention: Permanent. Retain for [x] years and then transfer to the Maryland State Archives for permanent retention.

Questions and comments are welcome! Contact information for the Department of General Services, State Records Center and the Maryland States Archives is listed below.



Phone Number:

DGS: 410.799.1930

MSA: 410.260.6400



Email:

dgs.src@maryland.gov

msa.helpdesk@maryland.gov