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## North Sound Behavioral Health Administrative Services Organization, LLC

Section 4000 - Information Systems: Email Retention

Authorizing Source: HCA Contract

Approved by: Executive Director

Date: 9/26/2023

Signature:

### **POLICY #4006.00**

### **SUBJECT: EMAIL RETENTION**

#### **POLICY**

North Sound Behavioral Health Administrative Services Organization (North Sound BH-ASO) 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 Microsoft 365 Exchange, via backup technologies and the Security Officer. Other aspects are handled by the users of the system.

#### **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 that must retain email correspondence for compliance or business needs should save those email messages within their own 'My Documents' folder, or their respective Departments folder.
2. Users shall not save their *personal* 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'. A .pst file or a .zip file can be used if many emails, such as an entire email folder, need to be archived. See the "*Saving Outlook Emails*" how-to for specific instructions.
4. Each user is responsible for the necessary retention and destruction of their archived emails.

#### **IT Department Responsibility**

1. A Journal of all North Sound BH-ASO email correspondence is captured and backed up monthly for compliance purposes. It is saved to .PST, zipped, encrypted, and archived in offsite backups for a six (6) year retention period.
2. Maintain and monitor network system backups per North Sound BH-ASO's Backup Policy.
3. Administer, maintain, and monitor the Office 365 email system, as well as the on-premises email journal and relay servers.
4. Aid users on how to save their email correspondence.

#### **REFERENCES**

Instruction: Saving\_Emails\_from\_Outlook.pdf

#### **ATTACHMENTS**

None