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Pittsburgh Public Schools
Standard Operating Procedure

Retention Policy

Office of Information and Technology

OIT-012

Retention Policy

Overview

This document provides an e-mail retention policy that governs how long e-mail messages are stored on the Microsoft Exchange Online servers. E-mail copied or downloaded to personal or local storage does not apply to this policy.

Primary Guidance to Which This Policy Responds

This policy responds to the “Acceptable Use” and the “Information Security” policies.

Responsible District Office & Officer

The office of Pittsburgh Public Schools Information Technology is responsible for the maintenance of this policy, and for responding to questions regarding this policy. The Chief Information Officer (CIO) is the responsible officer.

Revision History

This policy was established in 2019.

Who is Governed by This Policy

This policy applies to all individuals who are granted a Pittsburgh Public Schools email account. A Pittsburgh Public Schools email is defined as an originating or destination domain of @pghschools.org, @pghboe.net, @pps.k12.pa.us, @mypps.mail.onmicrosoft.com, @students.pghschools.org, @ppsstudents.net. Those individuals covered include, but are not limited to, faculty, staff, students, those working on behalf of the District, and/or individuals authorized by affiliated institutions and organizations.

Who Should Know This Policy

Anyone with a Pittsburgh Public Schools email account should know this policy.

Exclusions and Special Situations

None

Policy Text

The following lists the acceptable use and security measures that one must exercise when using Pittsburgh Public Schools’ email.

1. A large portion of Pittsburgh Public Schools communication is conducted via Email. The purpose of Email is to communicate, not to permanently store electronic information. All business-related communications will be conducted using Pittsburgh Public Schools technology systems; as such, internet Email services such as Yahoo! or Gmail are not to be utilized without express written permission from Pittsburgh Public Schools. Pittsburgh Public Schools users must manage the size of their mailbox, regularly review messages, and take timely action on long-term retention needs. Email will be retained for a period of one year. If an Email is subject to multiple record retention requirements, it must be archived for the longest applicable period following the Record Retention Schedule. Any Email not filed in a longer-term archiving system within one year of it being sent or received will be automatically deleted.

2. Email messages created or received in the transaction of official Board and Pittsburgh Public Schools business can be categorized as public records based on the content of the message. The PA RTKL is designed to guarantee that the public has access to public records of government bodies at all levels. Pittsburgh Public Schools is required to produce all pertinent Email messages as part of the PA RTKL process, subject to certain enumerated exceptions.

3. Under the Federal Rules of Civil Procedure (FRCP), all Email messages are subject to legal discovery (i.e. eDiscovery). Failure to produce such documents may lead to sanctions, including monetary fines and adverse court rulings in the underlying case. Pittsburgh Public Schools is required to produce all pertinent Email messages as part of the eDiscovery process in all Federal lawsuits. Each Pittsburgh Public Schools user is individually responsible for maintaining the public accessibility and eDiscovery accessibility of his/her own incoming and outgoing Email messages.

4. Email messages generally fall within two broad categories:

a. Non- Email record / Transitory (delete at will) – This category of messages makes up the bulk of all Emails sent or received. These messages are created primarily for the communication of information. Transitory messages do not set policy, establish guidelines or procedures, certify a transaction, or become a receipt. These casual and/or routine communications do not have a specified retention requirement. Absent a litigation hold, a subpoena, or a PA RTKL request, non-Email records do not require retention scheduling or destruction authorization or reporting. To control excessive accumulation, it is necessary to keep only current, useful materials and to destroy non-records immediately after needs have been satisfied. Avoid filing non-Email record material with Records. Examples include: mailing list broadcast messages, thank you, replies to routine questions, invitations, etc. Employees sending or receiving such communications may delete them immediately or after any administrative value is lost absent a litigation hold, subpoena or PA RTKL request.

b. Email record (retain as required) – This category of messages has more significant administrative, legal and/or fiscal value than non-Email record/transitory messages. Email records are those that contain a final opinion, official position of a department or that transmit a Record as defined in the policy. If these messages must be retained longer than one year, they must be transferred from the Email system to another storage location pursuant to guidance from OIT.

5. Upon an employee's separation of employment, the employee's Email account shall be terminated, and Pittsburgh Public Schools retains the right to access Email made or received by the employee using the Pittsburgh Public Schools Email Systems or which is otherwise made or received in the course of employment. An employee who separates from employment shall not remove, destroy, or copy any of the business-related Email entrusted to his/her care or created by him/her during employment, unless otherwise permitted in writing by Pittsburgh Public Schools.

6. The OIT department will annually report to the Chief Executive Officer or designee any storage space issues encountered while retaining Email records.

7. Related tools in the Email System

a. Calendars, just like Email, can be non-Email records/transitory or Email records depending on whether the attachments contain a final opinion, official position of a department or transmit a Record.

b. Tasks, notes and other related tools are non-Email records/transitory and should be deleted at will unless subject to a litigation hold, subpoena or PA RTKL request.

Contacts

For questions or comments:

Pittsburgh Public Schools Office of Information and Technology

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