

Is it an Email Record?

EMAIL Created or Recieved

Do any of the following apply?

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| <p>PURPOSE</p> <ul style="list-style-type: none"> Was information in email mandated by statute or regulation? Does it support a financial or legal claim or obligation? Is it required to operate or support DoD programs? Was it created or received in conduct of DoD business? | <p>ADEQUACY OF DOCUMENTATION</p> <ul style="list-style-type: none"> Does it facilitate DoD actions (ensure continuity and consistency)? Does it assist in the formulation of policies, decisions, or DoD Directives? Does it contain board, committee or staff meeting actions? Does it protect DoD and individual rights and interests (financial, legal, and/or other)? Does it contain information required by Congress? |
| <p>PRESERVATION</p> <ul style="list-style-type: none"> Is the material appropriate for wither permanent or temporary preservation by DoD? | <p>VALUE</p> <ul style="list-style-type: none"> Does it have administrative, programmatic, fiscal or legal value? Does it have historical or evidential value? |

PERSONAL PAPERS

- Emails not pertaining to transacting DoD business
- Emails accumulated by an official before assuming office
- Emails related to private, personal matters kept for convenience
- Emails with presentations or papers of a professional nature not representing

Does email consist of private information pertaining solely to your affairs?

No

Yes

No

EMAIL RECORD

- Emails related to DoD's mission or administrative activities or otherwise contribute to an understanding of DoD mission or administrative activities
- Emails containing DoD transactional information
- Emails with supporting materials sufficient to document and/or explain the document trail/decision making process for administrative, legal, final, programmatic, and historical purposes.
- May include drafts, attachments, raw data, meeting minutes and documentation of oral or telephone conversations

Did you comment or take action on the email?

No

Yes

No

Yes

Is retention of this email version necessary to document your action?

No

Yes

NON-RECORD or TRANSITORY EMAILS

- Emails that do not contribute to an understanding of DoD operations or decision-making processes
- Emails that have no substantial programmatic value
- Exact (extra) copies of record information serving as convenience copies kept solely for ease of access or reference
- Emails that are sent to individuals or offices interested in, but not acting on, a matter (FYI Copies)
- Technical reference documents needed for general information, but not properly part of the office's