

# DIOCESE OF DALLAS

## E-mail Retention Policy

According to the Record Management and Retention Policy and Schedule - Pastoral Center – Roman Catholic Diocese of Dallas - Dated November 9, 2009 (see section 5) Electronic Records:

Records generated and/or stored electronically, including emails, are subject to these policies in the same manner as printed documents. Retention decisions will be based on the content of the electronic record in the same manner as a printed document. As in the case with all records, they must be accessible and retrievable for the stated retention period.

## **E-Mail Policy & Procedure Guidelines**

### **General:**

- All information generated using equipment belonging to the Diocese of Dallas is the property of the Diocese and is subject to its control and monitoring. No one should assume that it is personal or private.
- Department heads and Senior Staff have the right to monitor individual pieces of email with cause.
- Any activity that is contrary to the laws, teachings, or morals of the Catholic Church, is against diocesan policy, or is illegal is prohibited.
- Using the e-mail system for any commercial purpose, political cause, or non-job-related solicitation is prohibited.
- Offensive messages including, but not limited to, messages that contain sexual implications and racial slurs will not be tolerated.
- Department heads and Senior Staff may take disciplinary action over abuse of Diocesan e-mail system up to and including dismissal.
- The Diocesan staff may be permitted to use the e-mail for personal messages at the department head or Senior Staff's discretion, assuming the usage does not interfere with official Diocesan business.

## Protecting the E-mail System

- Individuals have a duty and responsibility to preserve, protect, and account for the computer hardware, software, and data that they have access to as part of their Pastoral Center position.
- The department head and IT Department should be notified if anyone receives and offensive e-mail. The department head should then monitor the situation in regard to the frequency, content and duration of the e-mail and decide on appropriate action in consultation with IT Office and Legal Office.
- The department head should be notified of any suspicious activity (e.g. equipment or documents that appear to have been tampered with). The department head should then coordinate with the IT Office on an appropriate line of action.
- All Pastoral Center computers are equipped with virus protection programs, and staff is required to update them regularly (daily updates are provided).
- Quotas will be implemented limiting the amount of space available for e-mail storage. Department heads will be given 750MB space and all other staff will have 500 MB space for each user.
- If a user exceeds the quotas for email the emails should be printed and or stored according to the Diocesan File Retention Policies.
- It is the responsibility of each employee to clean out their e-mail folders on a regular basis so as not to exceed the allotted space on the exchange server.

## E-Mail usage

- Check mailboxes at least once a day (more frequently if possible).
- Treat and process electronic mail in the same manner as paper correspondence. Clean out your mailbox periodically by filing the messages elsewhere or deleting them. Do not retain messages in inbox folder or in deleted items folder. Messages to be retained according to the File Retention policy should be placed in the Department or User folder on the server and deleted from e-mail.

- Process any correspondence or forms that require authenticating signatures or initials in paper form and not by email.
- Do not send anything via the e-mail that is confidential or contains sensitive information.
- Do not assume a message will receive priority handling simply because you transmitted it electronically.
- Do not assume that information sent electronically is secure. There is no way of knowing who will see the e-mail at the recipient location.
- Never open any e-mail or e-mail attachment from a source that you are not familiar with or were not expecting.