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## Policy IT026: Email and Instant Messaging Policy

Recommended for Approval by:

A handwritten signature in black ink, appearing to read "Fawn R. Petrosky", written over a horizontal line.

Fawn Petrosky, Vice President for Finance

Approved by:

A handwritten signature in black ink, appearing to read "Dale-Elizabeth Pehrsson", written over a horizontal line.

Dr. Dale-Elizabeth Pehrsson, President

**Effective Date:** 2/24/2023

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### A. Intent

These requirements relate to Pennsylvania Western University (PennWest) electronic mail (E-mail) and Instant Messaging (IM) retention procedures with respect to the creation, use, maintenance, scheduling, retention, and disposition of records created on E-mail systems and systems that support IM.

This policy provides guidance for the efficient administration, management, and preservation of E-mail and IM in accordance with university records retention and disposition policies and ensures that electronic information systems support the legal requirements for record keeping within the university. They also guide departments in the development of methods to identify and safeguard E-mail and IM to meet accepted standards for a variety of requirements, including legal, records retention, and auditing standards.

### B. Definition(s)

**Instant messaging (IM) technology** is a type of online chat allowing real-time text transmission over the Internet or another computer network. Messages are typically transmitted between two or more parties, when each user inputs text and triggers a transmission to the recipient(s), who are all connected on a common network. Examples: Teams, Jabber, etc.

### C. Policy

The following policy applies to **All Accounts (Faculty/Staff/Student/etc) in the PennWest** email tenant:

Emails are automatically deleted after a specific period of time unless they are tagged with a pre-assigned retention period, or if a legal hold is placed on the account. Business relevant emails can be retained by tagging them with appropriate retention tags in Outlook, or by filing them in folders with appropriate retention tags.

In order to reduce the amount of sensitive data on email servers and to facilitate efficient and cost-effective backup of data, email will be administratively deleted as described below:

- Inbox messages, including subfolders will be moved to deleted items after 365 days
- Sent items will be moved to deleted items after 365 days
- Junk email will be moved to deleted items after 30 days
- Deleted items will purge after 30 days
- “Faculty and Staff can mark email that needs to exist for longer than one year by tagging individual messages with one of the following exemptions:
  - University business 2 years
  - University business 5 years
  - University business permanent

#### Additional restrictions

- Email must not be moved off the mail server into personal folders (.pst).
- It is a violation of policy to set up automatic forwards on a university email accounts to forward messages to a non-university email account.
- Once an email has expired from Deleted Items, it can't be recovered.

Legal Holds - There will be circumstances where the University is required to keep email due to legal requirements. These messages will be kept according to the particular specifications of the request.

#### **Instant Messaging**

The following policy applies to **All PennWest Institutional** Instant Messaging:

PennWest considers Instant Messages/Chat, like text messages and other temporary records that result from communication technologies, “Records Not Subject to Retention,” which means they can be deleted immediately or when they are no longer useful because these types of messages are generally more conversational and do not contain substantive material that needs to be retained.

In order to reduce the amount of data on the servers, Instant Messages will be administratively deleted as described below:

- IM's will be deleted from systems that support storage after 7 days.

#### **D. Procedure(s)**

Not applicable.

#### **E. Related policies**

Not applicable.

#### **F. Contact Information**

Information Technology Services

#### **G. Policy Review Schedule**

All policies will be reviewed every two years or on an as needed basis if a change in BOG, PASSHE or Pennsylvania law would create the need for an immediate change.