

SANILAC COUNTY COMMUNITY MENTAL HEALTH AUTHORITY

ADMINISTRATIVE POLICY

NUMBER: BA022

NAME: RETENTION OF MEMOS, EMAILS, AND CORRESPONDENCE

INITIAL APPROVAL DATE:	05/31/1994	BY: Sanilac CMH Board
(LAST) REVISION DATE:	01/20/2022	BY: Policy Committee
(LAST) REVIEW DATE:	01/18/2024	BY: Policy Committee
DISCONTINUED DATE:	N/A	REPLACED BY: N/A

I. PURPOSE

The purpose of this policy is to maintain important historical information as required by the State of Michigan Retention Guidelines.

II. APPLICATION

Populations: **ALL**
Programs: **Direct - ALL**
Contracted - ALL

III. POLICY

Pertinent Agency memos and e-mails that contain information or decisions that require written back-up or proof at a later date must be copied to the CEO. The Agency keeps a central file of important correspondence, maintained pursuant to the retention guidelines of MDHHS. These documents can be sent in hard copy or electronic format, while e-mails may simply be cc'd to the CEO and the Executive Administrative Assistant (EAA).

Administratively created memos that impact, or potentially impact, Agency functioning, service provision to multiple individuals at one time, or significant changes to programs, are required to be sent for retention. For any other memos, emails, etc., it is at the discretion of the staff writing or receiving a document referenced above to determine the potential future importance to the organization and worthy to be saved. Some examples would include decisions that impact the operation of the business or programs, personnel matters and financial tracking information. Confirmation as to the document's importance can be confirmed with the CEO, COO, or EAA.