



Records Management Guidance

Outlook / Email Best Practice



Outlook is a Microsoft software that is used by all county employees to send and receive electronic mail (email). **Use Outlook for communications that need to be documented.** For non-work-related topics or conversations that do not need to be documented, consider using Teams chat, phone calls, or in-person conversations.

Email Guidelines

- All emails are property of King County and are potentially subject to public disclosure
- Avoid using email for personal reasons
- Email must be managed in **all** Outlook folders (Inbox, subfolders, Sent, Deleted Items, etc.)
- Retain each email in a thread/chain (not just the most recent one)

Best Practices – Creating Email

- Use descriptive subject lines for each email
- Keep on the same topic in each email
- Avoid sending unnecessary email (be mindful when using Reply All and CC)
- Consider [accessibility](#) when creating email

Best Practices – Managing Email

- Identify and delete [transitory emails](#)
- Empty your Deleted Items folder consistently (if the Deleted Items folder is not empty, those emails will remain there indefinitely and are still discoverable until the folder has been emptied.)
- File inactive emails to [Content Manager](#)
- Avoid retaining emails anywhere besides Outlook or Content Manager
- *Most* employees use at least one category for email:
General Communications (2 years), but other categories might apply!

Resources

- [Outlook Tools](#) for email management
- Technical issues – Submit a helpticket at helpdesk.kingcounty.gov and/or contact KCIT
- Training – contact KCIT or locate external resources for guidance about how to use Outlook
- General records questions – [Records Management Program](#)
- Agency-specific records or process questions – [Records Management Leads or Agency Records Officers](#)



King County Records Management Program
206-477-6889 – records.management@kingcounty.gov
www.kingcounty.gov/recordsmanagement

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