

Why you need an electronic record deletion schedule

✘ Electronic records may not take up the physical space that paper copies do, but an orderly system of periodic deletion still should be part of a company's records retention policy. Every record, whether paper or electronic, has a life cycle – a specific amount of time that it needs to be kept. Holding on to records beyond their retention period results in an ever-increasing need for storage space and lowers retrieval efficiency.

However, deciding [which electronic records should be kept and for how long](#) is not always crystal clear. The last thing an organization wants is to discover at a later date that an important document no longer exists. Thus, records retention involves a thoughtful balancing act as to what stays and what goes. Creating and adhering to an electronic records deletion schedule formalizes the process to leave less room for guesswork or error.

Eliminate individual interpretation

When left to their own devices, people who handle electronic records may do one of two things. First, they may "hoard" everything out of fear that they will inadvertently destroy something that should be retained. This cumbersome mess wastes time when someone wants to find information. On the opposite side, employees may be too quick to dispose of something that to the untrained eye looks old or unnecessary. This action opens up the company to potential legal and regulatory problems.

Do not expect untrained people in your company to know inherently what stays and what goes. They need a clear record retention policy in order to understand and comply.

Get everyone on the same page

A company-wide conception of proper records retention enables organizations to manage information, minimize risks, and maximize compliance. Preserving, protecting, and purging documents is vital to these goals.

To start, define "business record" for your company. Basically, the term refers to evidence of business-related activities, such as events, transactions, discussions, and communications. Some types of business records, such as tax forms and legal documents, are relatively easy to spot. Others, such as emails and social media posts, are not so obvious. Be certain employees know not only your organization's precise definition of a business record but also the various forms such records may take.

Examining legal and regulatory guidelines provides a good foundation for establishing what types of electronic records you need to keep and for how long. Research rather than assume. Requirements may prove surprising, such as certain employee medical records that OSHA wants to be retained for 30 years.

Archive things that need to be retained permanently. Transferring items with this type of legal, fiscal, administrative, or historical value to a place where people can still retrieve them as necessary but do not encounter on a regular basis lowers the chance of accidental deletion.

Electronic records with a limited life cycle do not get archived. Instead, they require thought-out, spelled-out placement in your system. Their retention and deletion follow guidelines adhered to by everyone at the company.

Put together an electronic record policy team

Coming up with an electronic records retention and deletion policy is a large job. Creators must know which regulations apply to the organization and address them in the policy. This involves reviewing company and HR requirements, state law, federal law, industry regulations, government regulations, and insurance needs before developing record retention policy and procedures.

Assemble a team that approaches the record retention and deletion process from different angles and spheres of expertise. Members typically come from areas such as senior management, human resources, IT, records management, and legal/compliance.

Legal consult proves especially helpful in matters involving the organization's litigation and holds policy. Their advice places a destruction hold on electronic documents that should not be deleted because of potential future use. This forward-thinking measure may, for instance, preserve records pertaining to an employee who has expressed concern about harassment in case he or she later takes the matter to court.

Dispose of electronic records regularly according to policy

Not only does systematic deletion assist in keeping records manageable for company use, but it also gives the organization better ground on which to stand if legal issues arise. Courts frown upon selective deletion by individual employees as such action raises concern about cover-ups. Stick with a standardized, company-wide approach that can easily be audited.

Documenting processes demonstrate that deletion took place at the correct, predetermined time. A disposition log shows that someone actually carried through the destruction of a group of electronic records. Information commonly found on a disposition log includes the title of the record series deleted (usually not individual file titles), the date range of those records, the person authorizing the disposition, the method of deletion, and the date the disposition took place.

Setting up a records retention policy that includes clear deletion protocols takes time and thought. However, the manageability gained through removal of electronic clutter and the peace of mind secured by adhering to rules that keep valuable information from inadvertent destruction makes the effort worthwhile.