



**ASSESSMENT OF EMAILS FOR PERMANENT RETENTION
CATEGORY 1**

December 2018 Update

Agency: _____

The positions identified in the examples below are high-level, senior officials in your agency whose emails are records of significant historical value and are to be retained permanently. The email users in these positions are specifically responsible for decision-making that shapes an agency's policies or initiatives and core agency functions. Consult the *Functional Schedule for State Agency Records* and the "Appraisal Criteria for State Agency Email" for additional guidance.

For each individual identified below, please list the email accounts of all predecessors in that role since January 2011.

- 1. The head of the agency, such as the secretary, commissioner, Council of State member, superintendent, executive director, president, or equivalent.** This includes the very top executives of the agency; some agencies will have only one position for this category, although that one position may have multiple email accounts.

NAME	POSITION TITLE/ROLE	BEACON POSITION NUMBER	EMAIL ADDRESS	BEGINNING DATE FOR EMAIL COLLECTION

Predecessors (from January 2011-present):

NAME	POSITION TITLE/ROLE	EMAIL ADDRESS	BEGINNING & ENDING DATES IN THIS POSITION



2. **Principal assistants to the head of the agency (second tier of management), such as assistant and deputy secretaries, deputy directors, commissioners, assistant and deputy commissioners, and/or their equivalents.** The number of positions at this level will vary greatly from agency to agency. Some agencies will have only one, while others may have multiple.

NAME	POSITION TITLE/ROLE	BEACON POSITION NUMBER	EMAIL ADDRESS	BEGINNING DATE FOR EMAIL COLLECTION

Predecessors (from January 2011-present):

NAME	POSITION TITLE/ROLE	EMAIL ADDRESS	BEGINNING & ENDING DATES IN THIS POSITION



Please sign here to confirm that the employees in the positions identified above routinely use email to produce records that document the core functions and programs of your agency.

Name (print) _____ Title _____

Signature _____ Date _____