



DATE: July 22, 2026

TO: MWI Outsourced Ombuds Panel Members

FROM: Dana Hinojosa, Director of Strategic Engagement, MWI

RE: Record Retention Policy

As ombuds, confidentiality is among our highest priorities. In a primarily virtual setting, not keeping identifying records becomes increasingly challenging and increasingly important as we meet the highest standard of ombuds practice. This policy ensures that we are not maintaining identifying records, therefore ensuring visitor anonymity and protecting both visitors and clients in the case of legal action. It outlines the measures MWI has set up to automatically redact and delete certain information out of Salesforce, along with what we are asking our ombuds panel members to manually delete.

While best practice is to delete these immediately after closing a Matter, we are requiring that this information is deleted monthly. To this end, we ask that each ombuds set aside time at the end of each month to do a record retention audit, ensuring that all visitor-related communications and other records are deleted. Each ombuds can bill for up to 20 minutes monthly using the billing category "Record Retention." MWI will compensate you for up to 20 minutes total each month to cover record deletion for all clients. To assist with the deletion process, we have created a [Record Retention Monthly Audit Checklist](#) that includes instructions on how to permanently delete items on different platforms.

Thank you for working with MWI to uphold the International Ombuds Association Standards of Practice and Code of Ethics and ensure our visitors maintain the anonymity they expect and deserve.

Salesforce Automated Redaction and Deletion

Salesforce Matter Records

- All identifying information (name) is electronically redacted from the “Matter Name” after a Matter closes, either when a visitor completes a survey, or after 30 days, whichever comes first.
- In-Matter Chatter posts are deleted upon Matter closure.

Salesforce Visitor Records

- All visitor identifying information and contact information (“First Name,” “Last Name,” “Email,” “Phone”) is electronically redacted from a Visitor record after the associated Matter closes, either when a visitor completes a survey or after 30 days, whichever comes first.
- Electronic notes in “Ombuds Notes” section will be permanently redacted upon Matter closure.
- “Visitor Submission” field will be permanently redacted upon Matter closure.
- In-Visitor Chatter posts will be deleted upon Matter closure.

Salesforce Tasks and Files

- All Tasks and Files linked to a Visitor or Matter will be permanently deleted either when a visitor completes a survey, or after 30 days, whichever comes first.

Salesforce Potential Visitor Database

- Potential visitor database and any backups will be permanently deleted within 30 days after the contract ends.

Ombuds Manual Deletion

Calendar Events

- All calendar invites pertaining to visitors will be deleted after Matter closure or no later than by the end of the month after Matter closure.

Email Correspondence

- Email correspondence with visitors will be deleted upon Matter closure or no later than by the end of the month after Matter closure.
- Email recycle bins will be emptied every 30 days.

Text Correspondence

- Text correspondence with visitors will be deleted upon closure of the Matter, no later than by the end of the month after Matter closure.

Physical Records

- Any physical notes or other material will be destroyed upon closure of a Matter, or no later than by the end of the month after Matter closure.

Zoom Meetings

- Visitor name and contact information will be deleted from Zoom record upon Matter closure, or no later than by the end of the month after Matter closure.

Other Identifying Information

- No identifying visitor information should ever be stored on a work computer outside of Salesforce.

File Backups

- Identifying Matter and Visitor information in Salesforce, M365, and other applications will not be backed up or stored anywhere outside of Salesforce.