EMAIL MANAGEMENT GUIDE

Public Archives and Records Office

Government of Prince Edward Island

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Emails are Records too!

EMAIL MANAGEMENT GUIDE

Email is a fundamental communication tool - one that must be managed in accordance with the _Archives & Records Act_ and the _Treasury Board Secretariat Policy and Procedures Manual_. This guide will help employees manage the large and diverse volume of emails that they receive.

WHAT EMAILS DO I HAVE TO KEEP?

Emails from your **inbox, sent folder, junk folder, and archive** must be reviewed to determine if they are a public record, transitory record or non-record. All records must be retained according to approved retention and disposition schedules. Please refer to the Information Management and Information Technology (IMIT) Portal - Recorded Information Management (RIM) section for definitions.

WHAT SHOULD I DO WITH EMAILS THAT ARE NOT RECORDS?

Non-records and transitory records that have passed their administrative usefulness can be deleted at the user's discretion. Consult the Transitory Records Guide .

WHO IS RESPONSIBLE FOR MANAGING EMAILS?

All employees are responsible for managing their email account and any other email account attached to their position. This is in accordance with the _Archives and Records Act_, the _Treasury Board Secretariat Policy and Procedures Manual_, and approved retention schedules.

Departmental RIM Coordinators are available to provide guidance on how to manage your email.

HOW SHOULD I FILE MY EMAILS?

Emails should be filed by approved retention and disposition schedules (i.e. Administrative and Operational). If there is no retention schedule for your email records, file according to function and/or subject. Be consistent with naming conventions on your email folders, your electronic drive folders, and your paper file folders. Consult the Electronic Naming Conventions Guide.

WHAT SHOULD I DO IF I HAVE RECEIVED AN EMAIL NOT INTENDED FOR ME?

If you are unsure whether you are the intended recipient of an email, contact the sender to confirm if the email was intended for you. If it was determined that the email was sent to you in error, consult the Unsolicited Personal Information Policy, complete the Unsolicited Personal Information form and contact your departmental RIM Coordinator. For more information on the Unsolicited Personal Information Policy, see Section 5 of the Treasury Board Policy and Procedures Manual.

WHAT SHOULD I DO IF I HAVE SENT AN EMAIL TO THE WRONG RECIPIENT?
If an email was sent to the wrong recipient, email the individual immediately and request that they delete the email. File that email in the same folder that you will be storing email records of the same subject. Consult with your supervisor to determine if there has been a privacy breach.

WHICH EMAILS CAN I REMOVE; WHICH ONES DO I HAVE TO KEEP?
Emails that are non-record (i.e. unrelated to government business) or transitory (i.e. of temporary usefulness) can be deleted. However, all emails that are public records must be retained as per approved retention schedules.

IF I HAVE PRINTED AN EMAIL, DO I STILL NEED TO KEEP IT?
All records must be retained in their original format. For public bodies that are subject to a legal hold, such as the Tobacco Litigation Hold, all emails that are public records must be retained. If you are not part of the Tobacco Litigation Hold or unsure if you are part of a legal hold, consult with your departmental RIM Coordinator.

CAN I USE MY PERSONAL EMAIL ACCOUNT FOR GOVERNMENT BUSINESS?
No. Employees are only to use ITSS approved email software when conducting government business (i.e. GroupWise and Microsoft Outlook). Please refer to the *Acceptable Use Agreement* for more information. If a work email is sent to your personal account, you should forward it to your government account and respond to it from there.

CAN I USE MY GOVERNMENT EMAIL FOR PERSONAL USE?
Although it is strongly discouraged, there might be situations where using your government email for personal use is required. If this occurs, delete the emails from your account as this increases the volume of incoming non-record material to your government account. Please refer to the *Acceptable Use Agreement* for more information. Using your government email for personal use means you are using it at your own risk. Government will not be held responsible for personal items stored in your government email account.

DO I HAVE TO FILE EACH PART OF AN EMAIL THREAD SEPARATELY?
Each individual email in an email thread must be retained if it is a public record. This will ensure the information as well as the integrity of the email remains intact.

IF I HAVE VOICEMAIL-TO-EMAIL SET UP, DO I NEED TO KEEP THE EMAIL ONCE I HAVE LISTENED TO THE MESSAGE?
Treat the voicemail as any other email you receive by determining whether it's a public record, transitory record or non-record. Proceed accordingly.

Best Practices for Managing Your Email

- Use the *To:* field for recipients that are expected to take action and make decisions on the topic.
- Use the *Cc:* field for recipients that you want to include for informational purposes <u>only</u>.
- Use the *Bcc:* field when sending emails to large groups. It protects the privacy of recipients by hiding their email addresses and protects sensitive information when someone uses the *Reply All* feature.
- Refrain from using confidential and personal information in subject lines.
- Only include the minimum amount of information necessary to perform the duties.
- Keep email content professional and to one topic. If the topic changes, create a new email thread.
- Be specific in the subject line. Create a clear and descriptive title without divulging confidential information. Use the subject line to indicate action, purpose and due dates.
- Check your junk folder, focused folder, and other types of folders for misdirected emails.
- Be vigilant about suspicious emails, such as phishing emails and spam.
- If you are responsible for managing an email proxy, follow the same process to manage the proxy as well as your employee account.
- Do not allow anyone else to access your government email, unless it is an approved proxy.
- Review your distribution lists on a regular basis to ensure the correct employees are part of your list.
- Include your signature block for all outgoing email messages being sent outside of your working group. *See <u>Email Signature Standards</u> for the government approved format.*
- Aim to identify and act on emails as soon as they arrive in your inbox.

Where Do I Start?

Start your new email practices on a going-forward basis. Once your current emails are managed, start focusing on your past emails.

Schedule time to do the work. Stay committed to your scheduled time so you can stay on top of things and do not become overwhelmed. Whether it is daily, weekly or monthly. Blocking off time with colleagues to work on your emails together can ease the process and can provide collaborative support.

Who Are My Supports and Resources?

- ☑ Supervisor, manager, director or colleagues
- ☑ Departmental RIM Coordinator (DRC)
- ☑ Records Management Community via Insite Portal
- ☑ IT Shared Services (ITSS), Tip Tuesday newsletters, and the [Information Security Awareness guide for employees](#)
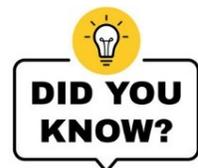
> **DID YOU KNOW?**
>
> Your email software has rules, categories and colour-coding available to help manage and organize your emails.

IS THIS EMAIL A RECORD?

CREATOR

Are you the creator?

- YES
- NO → Look at below chart.

YES: Does the email:
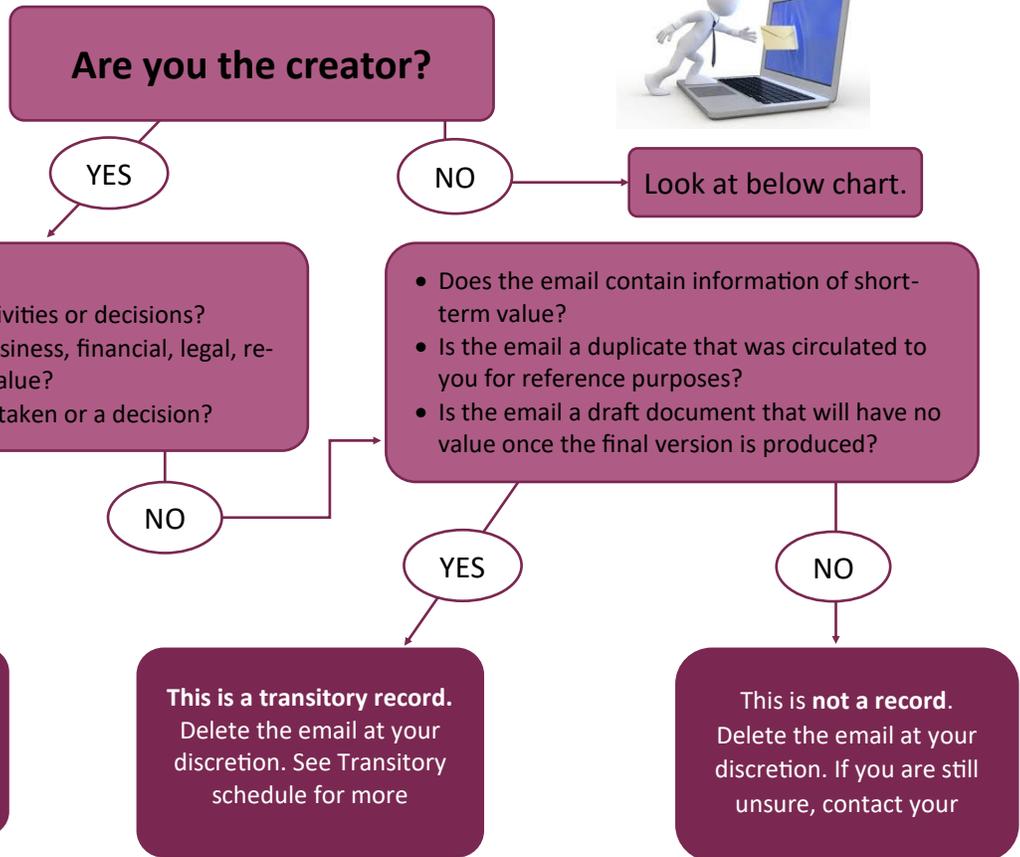- Support business activities or decisions?
- Have some future business, financial, legal, research or historical value?
- Document an action taken or a decision?

- YES → **THIS IS AN OFFICIAL RECORD.** File in appropriate folder and follow the retention schedule.
- NO →

NO (creator):
- Does the email contain information of short-term value?
- Is the email a duplicate that was circulated to you for reference purposes?
- Is the email a draft document that will have no value once the final version is produced?

- YES → **This is a transitory record.** Delete the email at your discretion. See Transitory schedule for more
- NO → This is **not a record**. Delete the email at your discretion. If you are still unsure, contact your

RECIPIENT

Were you the recipient, cc'd or bcc'd?

- YES
- NO → Look at above chart.

YES: Did you take action?
- YES → **THIS IS AN OFFICIAL RECORD.** File in appropriate folder and follow the retention schedule.
- NO →

- Does the email contain information of short-term value?
- Is the email a duplicate that was circulated to you for reference purposes?
- Is the email a draft document that will have no value once the final version is produced?

- YES → **This is a transitory record.** Delete the email at your discretion. See Transitory schedule for more information.
- NO → This is **not a record**. Delete the email at your discretion. If you are still unsure, contact your supervisor or DRC.