



Email Management

Administrative Procedure 5.70

Board Governance Policy Cross Reference: 1, 2, 3, 12, 13, 16

Legal Reference:

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Whenever email messages are sent or received in the conduct of School Division business, they become official records of the School Division. As records, they must be managed to the same degree that paper records are managed and may need to be disclosed under access to information legislation.

Managing Email

1) *What does management of email entail?*

Managing email includes effective:

- **Creation:** Knowing when and how to create an email that may be used as evidence of activity
- **Classification:** Filing email according to logical or organizational filing systems
- **Security:** Ensuring the protection of information under your care
- **Retention:** Ensuring records are retained as long as needed and in accordance with Administrative Procedure 5.140 (School Division Record Retention and Disposition) and Administrative Procedure 5.150 (School Division Records Management)

2) *Why manage email?*

Managing email is essential for:

- Providing evidence for the School Division's activities
- Being able to find a record in a timely fashion
- Ensuring compliance with privacy legislation. Personal or Personal Health information should be avoided or limited to the minimum amount necessary for authorized individuals to carry out their work
- Effective communication
- Efficient use of employee time (composing, searching and retrieving email)

3) *Who is responsible for managing email?*

IT will assist with the technical aspects of your account, but proper content, filing and disposal is up to individual employees.

It is best to file messages as soon as possible, while the subject and content are fresh in your mind.

As an employee of the School Division, it is your responsibility to manage your email account.

Protecting Information

When handling information that is confidential or sensitive, employees need to make sure that it is shared only with the people who are authorized to have it, and only those who need to know in order to do their jobs.

Before sending email messages, check to make sure the intended recipients are correct, and that any attachments are only those intended.

Quick Tips for Managing Email

- Consider whether an email is ideal for your intended communication
- Include clear subject heading, which allows for easy identification of the email content
- Maintain a professional tone in your email messages
- Keep emails to singular topics, which make them easier to file
- Provide links to documents (if possible), rather than sending attachments to limit clutter within the email system
- Set up folders in a logical or organizational filing system
- Routinely dispose of records (in accordance with Administrative Procedures 5.140 and 5.150)
- As the sender, you have responsibility for the email – Make sure you save a copy of your outgoing mail in the appropriate folder
- File emails with corresponding paper records together, so that the complete records may be easily accessed
- Quote only the most recent and relevant portions of the email, long email chains and threads often make finding and producing an email record difficult
- Unless it makes sense, do not add or remove recipients in the middle of an email thread. Consider a new email if the recipient list needs to be changed