**Records Management
Email Policy 141, 2014**

District of Lake Country
10150 Bottom Wood Lake Road
Lake Country, BC V4V 2M1
t: 250-766-5650 f: 250-766-0116
lakecountry.bc.ca

Date

The following was adopted as an Administrative Policy on June 24, 2014 and amended on May 30, 2020 and July 14, 2020

Purpose

Emails are official records of the District and are required to be retained and disposed of in accordance with LGMA Records Retention and Disposal.   This policy establishes consistent email practices and responsibilities.

Policy

1. STORAGE

Storing emails in Outlook, relying on server back-up and archiving emails are not appropriate for managing District records. These methods of storage prevent staff from accessing information and produce incomplete files.

2. ESSENTIAL EMAILS ARE A RECORD

2.1.   Essential emails contain:
   a)   information that would be fundamental if someone else was to take over the file;
   b)   formal decisions, actions, requirements, advice or guidance;
   c)   financial obligations or legal claims;
   d)   communications from internal or external parties that are an integral part of District business.

2.2.   Save one copy of the Essential email in either a .msg or .pdf format, in the appropriate file folder on the S drive and delete the email from Outlook.

2.3.   Rename the email as per the File Naming Policy.

3. TRANSITORY EMAILS

3.1.   Transitory emails:
   a)   are working materials or drafts used to complete an action or to prepare a subsequent record and have no further value once the final version is produced;
   b)   are not an integral part of business;
   c)   have no ongoing informational value to the District;
   d)   are duplicates or convenience copies received for information or reference only;
   e)   are general administrative or personal messages;
   f)   all emails not considered Essential under section 2.1

3.2.   Transitory emails may be stored in Outlook and deleted once they have served their purpose.

4. PERSONAL COMMENTS IN EMAILS

Personal comments and opinions cannot be severed from documents provided under a Freedom of Information of Request. Do not say anything in an email that you would not want to be made public.

5. ATTACHMENTS

5.1.   Attachments are to be saved separately from the email message. If saving the record as a .pdf, combine the email message and attachments into a single document and save in the appropriate file.

5.2.   When sending documents internally, send links to the file rather than an attachment to avoid the creation and proliferation of duplicate files on the file server.

5.3.   All documents send to external recipients should be converted to PDF prior to sending as much as possible, unless the document requires editing by the recipient. This includes Word, Excel and PowerPoint documents.

6. SUBJECT LINE

The subject line of an email may become the default file name. Subject lines should:
a)   be clear and specific;
b)   include one main topic;
c)   include the file name, file or permit number, or roll number when applicable.

7. WHO IS RESPONSIBLE

7.1.   "To" is for recipients where a response is required;

7.2.   "Cc" is for information only and recipients can delete the message;

7.3.   The **ORIGINATOR** of the email is responsible for saving emails in the appropriate file when:
   a)   the email is a thread (see Item 8);
   b)   the email is sent both internally and externally.

7.4.   The **RECIPIENT** is responsible for saving emails in the appropriate file when:
   a)   the email is received from external parties. Where there are multiple recipients, the first person on the list is responsible for saving the email;
   b)   the email needs to be saved to a restricted area such as personnel or legal;
   c)   a staff member has been delegated responsibility for saving emails for a specific file.

8. EMAIL THREADS

8.1.   Only the last email in an email in a threaded discussion is required to be saved as the official record. Save the email thread once the discussion has concluded or save and replace the file through the discussion until the last thread is the version in the file. Saving each email in a discussion results in significant duplication.

8.2.   If the discussion is no longer related to the Subject Line begin a new thread with a new subject line.

9. **MANAGING YOUR FOLDERS**

    9.1.   Save essential Sent Items immediately unless there is likely to be a series of exchanges.

    9.2.   Set Outlook to automatically empty your Deleted Items when you exit.

    9.3.   Only Reply All if it is essential that all recipients see the response.

    9.4.   Only mark your message as high priority when it truly is.

    9.5.   If notes, annotations or other information have been added to an email, a new record has been created and must be saved and filed.

    9.6.   Widely distributed email needs to be managed to avoid the retention of multiple copies (see item 7).

10. **SIGNATURE BLOCK**

The standard signature block for a **New Message** is:

Your Name
Title
District of Lake Country

t: 250-766-5650 Ext. xxx f: 250-766-xxx **lakecountry.bc.ca**

The standard signature block for **Replies** and **Forward** is:

Your Name
Title
District of Lake Country

11. **OUT OF OFFICE SETTINGS**

Customize your "out-of-office" message instead of relying on default wording. Include whether you will be checking email periodically, the date you expect to be able to reply and the name of an alternative contact.

12. **RETENTION OF MAILBOX AFTER END OF EMPLOYMENT**

Following the end of a person's employment with the District, the departed employees' email shall be delegated to a current employee for 3 months wherein all remaining contents of the mailbox will be permanently deleted. The department Director shall advise IT Manager of the delegation.

Dated this 25th day of June 2014   Alberto De Feo, CAO   *Original signed by Alberto De Feo*

Amended this 8th day of June, 2020   Alberto De Feo, CAO   *Original signed by Alberto De Feo*

Amended this 14th day of July, 2020   Alberto De Feo, CAO   *Original signed by Alberto De Feo*

I have read and understood **the Records Management – Email Policy**

Employee Name	Signature	Date