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## Date

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The following was adopted as an Administrative Policy on June 24, 2014.

## Purpose

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

## Policy

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### 1. ESSENTIAL EMAILS

#### 1.1. "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.

1.2. Only one "official" copy of the Essential email, and all attachments is to be saved as a msg file in the appropriate file and deleted from Outlook.

1.3. There is no requirement to rename the email so long as the subject line adequately defines the content.

### 2. TRANSITORY EMAILS

#### 2.1. "Transitory emails" are emails that:

- 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;

2.2. Transitory emails including their attachments may be stored in Outlook for up to three (3) years and are to be deleted from Outlook once they have served their purpose.

### 3. PERSONAL COMMENTS IN EMAILS

3.1. 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.

### 4. ATTACHMENTS

4.1. Save all relevant attachments separately in the appropriate folder;

4.2. When sending internal emails send a link to the document in an accessible folder. If the document cannot be accessed by the recipient it is acceptable to include an attachment.

## 5. SUBJECT LINE

5.1. The subject line becomes the default file name and must:

- a) be clear and specific;
- b) include one main topic per email;
- c) include the file name, file or permit number, or roll number when applicable.

## 6. WHO IS RESPONSIBLE

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

6.2. "Cc" is for recipients information only and can be deleted;

6.3. The ORIGINATOR is responsible for saving emails:

- a) that are threads (see Item 7);
- b) sent internally and externally and their responses;

6.4. The RECIPIENT is responsible for saving emails:

- a) received from external parties. If there are multiple recipients the first person on the list is responsible;
- b) that need to be saved to a restricted area such as personnel or legal;
- c) where they are the assigned or designated staff person responsible for saving email or for the file.

## 7. EMAIL THREADS

7.1. Email threads may be saved once the discussion has concluded or they may be saved at appropriate times throughout;

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

## 8. MANAGING YOUR FOLDERS

8.1. Ensure that essential Sent Items are saved immediately, unless there is likely to be a series of exchanges;

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

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

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

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

8.6. Widely distributed email needs to be managed to avoid the retention of multiple copies.

## 9. SIGNATURE BLOCK

9.1. 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](http://lakecountry.bc.ca)

9.2. The standard signature block for Replies and Forward is:

**Your Name**

**Title**

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**District of Lake Country****10. OUT OF OFFICE SETTINGS**

10.1. 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.

*Original signed by Alberto De Feo*

Alberto De Feo, CAO

*June 25, 2014*

Date

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

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Employee Name (print)

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Signature

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Date