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# Guidance on Email Management for Employees

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# Guidance on Email Management for Employees

## Issue

Email is one of the most common methods of communication in the Government of Canada (GC), creating vast amounts of information that is largely unmanaged. The lack of proper information management (IM) practices related to email impedes effective decision-making, transparency and accountability, and increases the risks related to retention and disposition. Employees need clarification of their roles and responsibilities regarding the information they create, send and receive via email, as well as guidance on ensuring they meet GC requirements when performing cleanup of their email accounts.

**Note:** In this document, “employee” means anyone working for the GC, including casual employees, temporary help, consultants and contractors.

## Context

This guidance provides email management best practices for employees in support of section 4.3 of the *Directive on Service and Digital*. All information created or acquired during the course of employment with the GC, regardless of format or medium, belongs to the Crown. Such information includes email messages. Employees are responsible for determining whether the information they have created or collected in email format is of business value. Most email messages do not have business value and are deemed to be transitory, so they should be deleted as soon as possible. Email that is deemed to have business value must be organized, categorized and stored in a corporate repository.

# Guidance

Employees should follow their department’s IM procedures for email management. In the absence of formal procedures, employees are encouraged to implement the following best practices, which have also been set out in point form in the Appendix of this document.

1. Employees are responsible for managing email messages in their inbox, sent and deleted messages, any folders they have created, and all attachments in their assigned email account.
2. In accordance with the *Policy on Service and Digital*, employees must:
    - identify and safeguard email messages according to their security categorization and associated information of business value that has been created, collected and stored during the course of their work
    - identify and dispose of transitory email messages
3. Employees should transfer email messages that contain information of business value to a designated corporate repository as soon as possible. To ensure the availability of information of business value to all who require it, and to ensure appropriate storage and safeguarding, it is recommended that email messages of business value be transferred to the corporate repository within 15 days whenever possible. Additional guidance on identifying and recognizing information of business value can be found in Appendix E of the *Guideline on Service and Digital*. Examples of email messages that have business value are:
    - messages that reference a decision

   - direct communications with clients
   - messages that authorize or complete a business transaction where that information is not captured elsewhere (for example, in a financial or human resource system)

4. Employees should regularly delete transitory information. Examples of transitory email messages are:

   - messages that are copies of information used only for convenience of reference and not as the official record
   - messages used for casual communication (for example, meeting invitations, lunch requests, thank you messages)
   - informal messages that are not required as evidence in the development of a document
   - messages that forward an attachment that is saved in a corporate repository
   - messages that are duplicate copies of information
   - messages received as part of a distribution list or received from a listserv or other Internet sources, and used solely for convenience of reference

   Transitory messages may be deleted once the information is no longer of use. Additional examples of transitory information can be found in the Guidance for Employees of the Government of Canada: Information Management Basics.

5. When a request is received under the *Access to Information Act* or the *Privacy Act*, an exact and complete copy of all responsive email messages and attachments must be provided to the department’s Access to Information and Privacy Office. Any transitory email messages that have not been disposed of before a request is received and that are pertinent to the request fall under the legislation and must be treated as any other document and processed as part of the request. It is an offence under section 67.1 of the *Access to Information Act* to obstruct the right of access by destroying records in anticipation of a request for

access under the legislation or during the processing of such a request. Once the Access to Information and Privacy Office has received an exact and complete copy of all email messages and all attachments responsive to a request under the *Access to Information Act* or *Privacy Act*, the email messages and attachments may continue to be managed according to their normal life cycle.

6. Employees should clean up the contents of email accounts regularly. Spending five minutes daily managing email helps greatly to:
    - keep the volume of email information under control
    - safeguard departmental information of business value
    - share and find information faster

   Further information is in the Appendix to assist employees with email cleanup.
7. Upon departure from a department, employees should redirect all email messages related to that department to their previous manager.
8. Employees who supervise others are also responsible for ensuring that employees who report to them understand and comply with the recordkeeping requirements of the *Policy on Service and Digital*.
9. Employees who manage generic email accounts should apply these best practices to the management of those accounts.

# Additional guidance

Employees should consult with their manager when they have questions regarding the management of their email.

For more information on IM, consult the *Guidance for Employees of the Government of Canada: Information Management Basics*.

## Further information

Office of the Chief Information Officer
Treasury Board of Canada Secretariat
**Email:** ServiceDigital-ServicesNumerique@tbs-sct.gc.ca
**Toll-free:** 1-877-636-0656
**TTY:** 613-369-9371 (Treasury Board of Canada Secretariat)

# Appendix

## 1. Sort email messages

Email messages can be sorted a number of ways. Use as many ways as possible to facilitate finding and deleting transitory information.

### By type of email message

- Meeting invitations and receipts can be deleted.
- Messages received only as a CC (carbon copy) or BCC (blind carbon copy) can be deleted.

### By conversation

- Replies: Duplicate information is created in email reply threads, which is transitory and can be deleted.
- Messages in a series: The last email message in a thread contains all the information from the previous email messages. Only the last email message should be kept. Delete all previous email messages in the thread.
- Separate replies: When several recipients have replied separately to an email message, only the original email message can be deleted.
- Requests for information and email messages sent “for information only” purposes can be deleted when they are no longer needed.

### By sender

- Email messages from corporate mass mailings and distributions, generic email accounts, and mailing lists or listservs can generally be deleted.

**By date**

- Sort email messages by date, starting with the oldest. Older messages may be transitory and may be deleted. Verify for business value prior to deletion.

## 2. Know what email messages to keep

Email messages that contain information of business value must be kept, as set out in the *Policy on Service and Digital*. Such messages:

- reference a decision of the department
- authorize or complete a business transaction where the information has not been captured elsewhere (for example, in a financial or human resource system)
- communicate directly with clients

## 3. Move email messages of business value to a corporate repository

Now that your email account is cleaned up, it is easier to keep it organized.

- Transfer email messages that contain information of business value to a corporate repository within 15 days whenever possible and delete transitory information that is no longer required.
- Also remember to manage your email account Sent folder.
- Don’t send attachments. When possible, use links to corporate repositories where documents are stored.

## 4. Delete transitory email messages

Transitory email messages can be deleted on an ongoing basis as soon as they are no longer required. Caution: **Exact and complete** copies of transitory email messages that are responsive to an access to information request must be provided to the Access to Information and Privacy Office prior to deletion.

**Remember!**

- Spending five minutes every day managing your email messages will help you keep your email account organized.
- The email message originator is generally responsible for saving the information of business value to a corporate repository.
- The email message recipient is responsible for saving email messages of business value received from outside the department or agency to a corporate repository.
- Delete transitory email messages as soon as they are no longer needed.
- Delete reference email messages when they are no longer needed.
- Use the email system features such as auto-forwarding rules and alerts to manage email messages. Contact your department’s IT help desk if you need additional help or training.

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