

## WHITTLESEA CITY COUNCIL

### RECORDS AND DOCUMENT MANAGEMENT BUSINESS RULE NO 2

<b>CATEGORY:</b>	Staff
<b>SUBJECT:</b>	Email Management
<b>PURPOSE:</b>	This policy sets out the conditions and protocols which apply to the <i>management</i> of Email messages. This Business Rule should be read in conjunction with Council Policy No 33 Email, Intranet and Internet Policy which sets out appropriate <i>use</i> of Email.
<b>DIRECTORATE RESPONSIBILITY:</b>	Civic Administration/Corporate Services

#### 1 INTRODUCTION

- 1.1 The use of email has become increasingly prevalent in the way business is conducted. Email is often the preferred method of communication, substituting for telephone conversations, paper based document circulation and distribution, and facsimile communications.
- 1.2 Any internal or external email, created or received in the **course of duty** at the City of Whittlesea is a public record and must be managed according to the provisions of the Public Records Act 1973, Electronic Transaction (Victoria) Act 2000, Information Privacy Act 2000, and the Freedom of Information Act 1982. (See Section 4 for definition of public record, business, council, or corporate email.)

These emails can only be destroyed/deleted in accordance with the *Local Government Records General Records Authority PROS 98/01*.
- 1.3 Transitory email. This policy does not relate to transitory or ephemeral email. (See Section 4 for definition of transitory email.) Transitory email may be destroyed at the discretion of the recipient.
- 1.4 Personal email This policy does not relate to personal email. (See Section 4 for definition of personal email.) Personal email may be destroyed at the discretion of the recipient.

NOTE: Any email that combines work and personal issues must be managed as a work related record.

## 2. RESPONSIBILITIES

- 2.1 All Council staff and contract staff employed by council are responsible for managing email.
- 2.2 The Records Unit is responsible for managing email addressed to the email address Whittcc. Other business based email accounts must be managed by the relevant business unit.
- 2.3 The officer who **creates** an email, or who **receives one from a source external** to the Council is responsible for its capture into an appropriate record keeping system.

Staff are responsible for managing their "Sent" email folder as well as their "Inbox".

- 2.4 Staff who receive public record, business, council, or corporate email are expected to ensure their email "Inbox" is read and actioned during any absences/leave.

## 3. APPROPRIATE RECORD KEEPING SYSTEM

- 3.1 For staff who have EDM deployed, the EDM system is to be used for the retention of email that relates to the business of Council.
- 3.2 For staff without EDM, the policy is to continue to print and file a paper copy of the email on the hardcopy files maintained by the Records Unit.

## 4. DEFINITIONS

Transitory email	Relates to information that facilitates council business but does not need to be retained for council purposes. Examples of transitory email <b>may</b> be: <ul style="list-style-type: none"><li>• Staff movements</li><li>• Advertising material and any other publicly available material</li><li>• Any internal email which the recipient has been received as "cc" or "bcc".</li><li>• <i>Copies</i> of minutes and agenda, notices of meetings where you are <b>not</b> the convenor.</li><li>• <i>Copies</i> of reports and newsletters received for information only</li></ul>
Personal email (received in accordance with Council Policy No 33)	Relates to a personal or private matter and has nothing to do with the business of council. Examples of personal email may be: <ul style="list-style-type: none"><li>• Lets do lunch</li><li>• Personal/family arrangements</li><li>• Unsolicited information or jokes not related to work responsibilities.</li></ul>

Public record, business, council, corporate email	<p>Email that documents the business activities of Council. Examples of public record email are:</p> <ul style="list-style-type: none"> <li>• Communications between staff in which formal approval is recorded.</li> <li>• Direction for important course of action.</li> <li>• Correspondence received from outside the council that relates to some business or process of council eg garbage collection, animal registration, permit enquiries, child care.</li> </ul>
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### 5.. HOW TO DETERMINE EMAIL CATEGORY?

<b>QUESTIONS</b>	<b>YES</b>	<b>NO</b>
1. Is it related to City of Whittlesea Business?	Go to question 2.	The email is personal and can be deleted
2. Am I sending an internal e-mail to another staff member that will require action ?	The email is corporate record and should be managed.	Go to question 3.
3. Am I sending an internal e-mail to another staff member requesting authorisation for action?	The email is corporate record and should be managed.	Go to question 4.
4. Does the e-mail I have received contain council related correspondence?	The email is corporate record and should be managed.	Go to question 5.
5. Am I replying to an external e-mail that contains council related correspondence ?	The email is corporate record and should be managed.	Go to question 6.
6. Am I sending email that is council related correspondence to an external recipient ?	The email is corporate record and should be managed.	The email is ephemeral and can be deleted as part of normal administrative practise.