

Managing emails

Recordkeeping fact sheet 2

Emails that need to be kept

Emails which document departmental business activity must be kept as records.

Examples of email records include:

- a communication between staff in which formal approval is requested / received
- a direction for an important course of action
- business correspondence received or sent outside the department.

Email records must be printed and placed in TRIM registered hardcopy files, or saved electronically in TRIM. The record must include the history of replies and attachments.

Only authorised Records Management staff may destroy email records.

Emails that do not need to be kept

Some emails facilitate business but do not need to be retained as a record.

Examples include:

- meeting notices
- copies of minutes, reports or newsletters
- general notices to staff (unless you are the author)
- emails received by carbon copy (Cc) or blind carbon copy (Bcc).

This type of short-term business email, as well as non-business emails, can be destroyed as part of Normal Administrative Practice.

Personal emails

Personal emails relate to private or personal matters which have nothing to do with departmental business. Personal emails can be destroyed when no longer required.

If an email incorporates both personal and work-related information, the email is a record and must be kept.

Who is responsible for saving email records?

You are.

Business emails you **send** must be saved as records.

You must also save business emails you **receive** and are required to act on.

Where there are multiple recipients of an email, the person who has **primary responsibility** for the subject of the email is responsible for saving it.

Tips for managing emails effectively

Language

Keep the language of business emails formal
Do not mix business and personal topics (emails may be required as evidence or subject to disclosure under the *Freedom of Information Act 1982*).

Titles

Give emails a meaningful title

Email titles should:

- accurately summarise the topic of the email
- include a number of keywords to facilitate searches

If the topic of an email discussion changes over time, consider changing the title to ensure that it still reflects the subject.

Confidentiality

To avoid the possibility of accidentally disclosing personal information, do not use names of individuals in email subject lines e.g. names of clients, departmental staff and members of the public.

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Completeness

Save email exchanges as a single record.

When a business matter has been discussed in an exchange of emails between two or more participants:

- If you are keeping the record in hardcopy, print the exchange as a single document and attach it to the appropriate file (if the first messages in an exchange have been 'collapsed', you will need to open them in order to print the message in full).
- If you are saving the record in TRIM, save the exchange as a single item.

Attachments

Keep emails and attachments together when placing them in files, or saving them in TRIM, to maintain their relationship to each other.

Deletion

Only short-term and personal emails may be deleted, email records must be retained

Related documents

Naming conventions – recordkeeping fact sheet 3

Further information

For further assistance, please contact the:

Records Service Centre: 9096 8999

Email: RecordsService.Centre@dhhs.vic.gov.au

or your local Records Management unit:

Records Unit East Division: 9843 6090

Records Unit North Division: 9412 5427

Records Unit South Division: 8765 7164

Records Unit West Division: 5333 6088

To receive this publication in an accessible format phone 9096 8999, using the National Relay Service 13 36 77 if required, or email RecordsService.Centre@dhs.vic.gov.au