Email Best Practices

Dalhousie Administrative Records
Related to Dalhousie’s &
Affiliated Partners Integrated Work

Dalhousie University is located in Mi’kma’ki, the ancestral and unceded territory of the Mi’kmaq. We are all Treaty people.

We acknowledge the histories, contributions, and legacies of the African Nova Scotian people and communities who have been here for over 400 years.
Video

If so, keep the content professional & double-check the intended recipients.

Found on Records Management Website under Resources- Email Content Management Best Practices
Overview

- Intro
- Creation
- Management of Accounts
- Email Triage Chart
- Outlook Features
- Other Resources
Intro - Acts

**FOIPOP** (Freedom of Information and Protection of Privacy Act)

**PHIA** (Personal Health Information Act)

**PIPEDA** (Personal Information Protection and Electronic Document Act)

& Others *(depending on jurisdiction of affiliated partner)*
PHIA vs FOIPOP

PHIA = Affiliated Partner vs FOIPOP = Dal

- What would happen if either systems where breached?
- Different requirements for health custodians
- PHIA: systems are outlined, has stronger safe guards & clearer guidelines
- Student involvement related to grading /evaluation of student - Dal owner
- The nature of any student related email is Dal business not Affiliated partner business
Intro – Policies
(Dal)

Records Management Policy

Acceptable Use Policy

Policy for the Protection of Personal Information Accessed Outside of Canada
Intro – Protocols & More
(Dal)

Email Protocol

Official email use message (found on ITS SharePoint site)

Go to ITS site:
IT Polices, Protocol, and Guidelines for even more
Creation

Consider:

- Who you are sending it to
- What information you are sending
- Where it is going to
- Why you are sending it
- Dal vs Affiliated Partner
Creation - example

Dal vs Affiliated Partner

- Account information
- Student grades & evaluations
- Correspondence with a student
- Correspondence about a student
- Encryption Tunnel & at Rest
- Smaller and easier to secure
- Dal Has Multi Factor ID protocols

- Patient care information
- Correspondence about clinic administration
- Different sites are harder to maintain high level of security
Who = Recipients

- Reply all?
- The right individuals?
- Would a phone call be better?
What = Content

- One topic = One email
- Personal Information
  - Only send what is required
  - DO NOT Retain these emails and attachments in Outlook
- Keep it professional
  - Language & Tone
- Keep topic related → topic related
What = Content

Personal Information Defined *(FOIPOP)*

- name, address, telephone, email (personal not business);
- race, ethnic origin or religious political beliefs or associations;
- age, sex, sexual orientation, marital status or family status;
- any identifying number or symbol (examples: DalCard ID, SIN, credit card, health insurance, drivers’ license);
- fingerprints, blood type, or inheritable characteristics;
- medical or personal history; e.g. educational, employment, financial, or criminal history;
- personal views or opinions.
What = Content

Inside the Dal.ca domain emails are encrypted.

* But *

When they leave the Dal.ca domain they are NOT.
### Management Account Used

<table>
<thead>
<tr>
<th>Dal Outlook Client</th>
<th>Other Email Carrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desk top application &amp; Computers</td>
<td>Ask their IT Dept.</td>
</tr>
<tr>
<td>- Encrypted during transit</td>
<td></td>
</tr>
<tr>
<td>- <strong>MAY NOT</strong> be encrypted at rest</td>
<td></td>
</tr>
<tr>
<td>- Device encryption at rest – Talk to Dal ITS about</td>
<td></td>
</tr>
<tr>
<td>MyDal &gt; Outlook on-line</td>
<td></td>
</tr>
<tr>
<td>- Fine</td>
<td></td>
</tr>
</tbody>
</table>
Why = Function

- Is this an administrative business function of Dal or the Affiliated Partner?
  
  Check - DalCLASS

- Can a Dal.ca email be used instead of an external account?

- Is a phone call better?
Management – General

- Emails are subject to FOIPOP
- Outlook is NOT a Dal Approved Repository for records storage.
- Think = Transactional Based
- Document the process on how the unit should be dealing with emails
  - DalCLASS retentions application
- Deletion vs Permanent Deletion
  - Set up trash folder to routinely delete emails
Management – Individual Accounts

- Email Capture – part of workflow
  - Who needs access to the email & when
- Personal Folder
- Leaving Dal or moving within Dal
  - What do you do with the emails?

Student
Employee
& Alumni

Can = Same email account
Management – Shared Accounts

Document the use of:

- Who has what rights and why
- Schedule of - user access review & who is accessing when
- Do the users have the emails forward to their accounts? 
  *(creates unnecessary duplication)*

- Categorize feature
- Folder structure – ex. have a template folder
- Naming convention – subject lines, folders
Email Triage Chart

- New Email
  - Received
    - Delegate
    - Transitory
      - Transitory
        - Action Required?
          - Yes
            - Review
              - Forward
              - Drop into Calendar
              - Flag
            - No
              - Save it in your One Drive as a reference
    - Respond
      - Is it a record?
        - Yes
          - File it in the approved University Provisioned Service
          - Save it in your Personal Folder in Outlook
        - No
          - No but I want it for reference
          - Do I still need it?
            - Yes
              - File it in the approved University Provisioned Service
            - No
              - Save it in your One Drive as a reference
  - Created
    - Is it a record?
      - Yes
        - Is it personal?
          - Yes
            - Do I still need it?
              - Yes
                - Save it in your Personal Folder in Outlook
              - No
                - No
          - No
            - Save it in your Personal Folder in Outlook
    - No
      - No but I want it for reference

Delete From Outlook
Outlook Features

Microsoft 365 Training Centre
Outlook Features – Cleanup Conversations

Select:
- The email conversation that you'd like to clean up.
- Right click
- Choose > Clean Up Conversation.
- Select Clean Up.
Outlook Features - Setting Rules

Select:

- The Folder you want to save
- Right click
- Choose > Properties
- Select > AutoArchive
- Then > Archive
- Enter the time frame and location you want them to be saved to. Then Apply
Other Resources

- **Percipio** email tutorials
  
  Search terms:
  - ‘Outlook’
  - ‘Outlook 365’ (*online version*)
  - ‘Outlook 2016’ (*desktop version*)

- **Dalhousie + Microsoft 365 User Resource Centre**