

Records Best Practices Medicine Hat Public School Division

As an entity subject to FOIP, most of our communications and documents become official records, which means they could be **shared with an external party in the case of a formal FOIP request**. In recent years the Division has received several FOIP record requests, all of which request an extensive record search and review. Many of these FOIP requests span multiple years. In some cases, there have been a significantly large number of records or unnecessary sensitive records that require a significant level of review before sharing with the FOIP requestor.

Below are some best practices when it comes to keeping the level of records manageable as well as limiting unnecessary sensitive information.

General Communications

1. Keep communications professional and respectful.
2. Stick to the facts of a situation and minimize personal opinions unless relevant.

Email

3. Draft emails – When doing an email exchange search a draft email becomes a record in a FOIP search. Review and possibly delete your drafts on a regular basis.
4. Delete folder – this folder does not automatically empty on a regular basis. If you right click on the folder you need to manually select empty on a regular basis.
5. Forwarding or replying emails – if an email is forwarded multiple times, all the earlier versions below in the email become records in the FOIP search; therefore, if it is not relevant to include all previous versions delete this from your email.
6. Emails attachments – if you are replying to an email or forwarding an email and the attachment is not relevant to your email, please delete the attachment.

Saved documents (word, excel, google drive)

1. This includes documents saved in Onedrive or Sharepoint.
2. If a draft document is being reviewed by multiple users, consider using the sharing features within Sharepoint and Onedrive that allows users to make comments within the document. This avoids all users requiring input from saving a copy in their files. However, once the file is complete, it may be appropriate for each user to save a copy in their preferred location.
3. Records retention – only keep records as long as necessary. Refer to the [Division's Records Retention Schedule](#).