CALENDAR MANAGEMENT

Introduction

This guideline is to provide best practices for administrative support personnel on managing the calendars for Director level staff and above within the Office of the Premier.

This guideline meets the retention requirements of the *Information Management Act,* the Chief Records Officer Directive on Documenting Government Decisions, and transitory information. Calendars for staff members working in offices of Ministers, Deputy Ministers, Assistant Deputy Ministers, and equivalent positions fall under the Executive Records Schedule.

*Please note: Anything to do with the business of government shown in the calendar includes entries 7 days/week, 24 hours a day

How to create calendar entries for your DM/ADM

Titles:

- Keep titles brief and descriptive
- Start with the reason for the entry, for example: Meeting, Briefing, Call, 1 on 1, or the name of the committee/ group
- Include the reason for the meeting if the meeting if a result of a discussion on a specific subject matter. Keep this vague. This information should not require severing under the *Freedom of Information and Protection of Privacy Act* (FOIPPA) *Please see "How to maintain calendar entries" for more details.
- Include the names of attendees.
    - Please exclude this step if you are booking for a specific group or committee

<u>Examples:</u>

- Meeting re: Estimates Lori, Eric, Mark and Jackie
- Briefing re: Covid Update
- Cabinet Working Group on Covid
- Meeting: Lori and Jackie

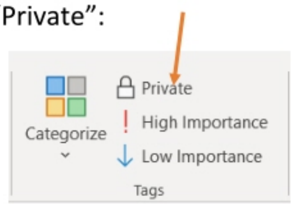
Attachments

- Avoid attaching records to meeting invitations or including agendas and detailed meeting information. If needed, email this information separately or use other applications for sharing records (such as shared drives, SharePoint) if available.

- If information is attached to a calendar entry as a convenience copy for the calendar owner, be sure to file it on the LAN in the appropriately scheduled folder.

Private/personal entries

- Mark personal appointments and reminders as private. In the new meeting window in Outlook, select “Private”:



  - Examples of personal appointments include medical, children’s scheduling, etc.
  - Staff social events occurring on unpaid breaks such as lunch dates should also be marked private.

How to maintain calendar entries

- Calendar records should be kept current by regularly updating entries as changes occur.
- Staff should schedule a monthly or weekly review of their calendar and clean out any personal or transitory information.
- Entries that did not occur, or where the calendar owner did not attend should be deleted. Do not include appointments of other people.
- Private and personal appointments should be deleted after they have occurred.
- Attachments included in meeting invites should be filed and removed from the calendar entry.
- Booking links and call-in details should be removed as transitory.
- Consider a careful review of meeting titles and determine if their release would result in harm to the government. If so, consider modifying the title.
- Review content in the body of the calendar entry and determine if the information included is transitory.

Proactive Disclosure, Freedom of Information Releases, and Litigation

Proactive Disclosure

- At present, the calendars of all Deputy Ministers, Associate Deputy Ministers, and Ministers are released proactively monthly.
- Prior to release review the calendar to ensure all entries have been saved in accordance with these guidelines.

- Unlike general FOI requests, proactive disclosures allow editing to remove transitory and personal information prior to having records sent to IAO.

Calendar Requests for FOI

- Once a calendar becomes the subject of a request for records under FOIPPA, please make note of the following:
  - Do not alter the calendar in any way. Records that are responsive to an FOI request cannot be changed.
  - Save the calendar as a pdf.
    - For FOI requests, please complete a harms assessment prior to sending it to your FOI contact.

Calendar Requests for litigation

- If a calendar is responsive to litigation or other legal proceedings, take steps to preserve the records as they are and follow the instructions provided by legal counsel. Legal counsel can also provide advice if any changes were made to the calendar between the time the search for records was initiated and when you received notification.

FOI for MS TEAMS

Chats:

- Standalone one-on-one, group chats, meeting chats and conversations within a channel are all deleted within 30 days. This allows us to avoid the need to hold “transitory” information unnecessarily.
    - *Please note: it is the content of the message and not the message itself that should be considered when deciding if the information is transitory. A transitory message would include information that has a temporary usefulness.*
- If you received a chat message that is essential for understanding government business, that message must be kept. To avoid having the message deleted, per the 30-day procedure noted above, copy and paste the message into a word document where it can be retrieved later.
- If the messages in your custody are not deleted and are responsive to an FOI request, they must be provided in a word document, as noted above.
- Best practice would include deleting all transitory chats at the end of each day.

Files:

- Files managed in MS Teams should be retained by ORCS/ARCS and executive schedules.
- Files for channels are maintained in SharePoint online and can be viewed, created, edited, uploaded, and downloaded in Teams.
- For files to be deleted, users must navigate to SharePoint online and place the files in the Recycling Bin. If your channel has an administrator, they will need to approve the destruction of these files. Once deleted, these files cannot be recovered.
- To fulfill FOI requests, responsive records held in Teams, must be downloaded and provided to the FOI team.
- Best practice guides for managing files can be found on the GRS website: https://www2.gov.bc.ca/gov/content/governments/services-for-government/information-management-technology/records-management/training#guides
- Alternatively, you may contact OOP.FOI@gov.bc.ca.

Office of the Premier

Information Destruction Procedure

Contents

Overview

To increase ministry autonomy and streamline authorities for the destruction of government information, ministries will now maintain full authority for the destruction of records.

The implementation of this guide will provide the Office of the Premier with full accountability when providing evidence of destruction approvals for related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated; limits access to protect the privacy and security of personal information; records when information is destroyed and whom the authorized the destruction.

This document outlines the destruction process for eligible, scheduled ministry information. Information covered under this process becomes eligible once it has reached the Final Disposition stage and has a final disposition of DE (Destroy).

Application of the Defensible Information Destruction schedule

The following record types are included under this schedule:

- Physical records kept on-site (paper, audiovisual, photos, discs etc.)
- Digital records managed in EDRMS (e-folders), on a LAN, or stored in systems
- Redundant source information

This process does not apply to the following records:

- Records stored off-site (these are handled through a 60-Day Notices process)
- Records with a final disposition of Selective Retention (SR) or Final Retention (FR)
- Records scheduled under the Transitory Information Schedule

Roles and Responsibilities

All employees have information management responsibilities within the Office of the Premier. While the responsibility for the governance of information management falls to the Deputy Minister to the Premier, positions within the Deputy Minister to the Premier's Office have been delegated to ensure proper policies and procedures are put in place and enforced.

Destruction of records must be adequately documented in order to comply with the Information Management Act, which includes maintaining a record of destruction approval for the current calendar year plus 30 years.

Location	Roles	Overview
Office of the Premier	All Employees	**All employees have information management responsibilities as indicated in the Appropriate Use Policy:** • Be aware of and fulfill their IM/IT obligations • Employees must only dispose of government information in accordance with an approved information schedule.
Program Area	Area Support Staff	The area support staff is delegated by the Subject Matter Expert as the main contact for records management within the program area. • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Carries out destruction actions, one approved
Program Area	Approver	The approver is the Director of Executive Operations within the Deputy Minister to the Premier's Office or their delegated authority • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Deputy Minister's Office	Subject Matter Expert (SME)	The Subject Matter Expert is the Information Management Advisor, with the responsibility of: • Providing governance, oversight, and administration of the Ministry Destruction Authorization Model • Providing the resources, tools, and forms for ministry program areas to adequately document destructions • Issuing destruction control numbers and documents approvals and actions • Verifying the accuracy of destruction documentation • Authorizing destruction requests • Maintaining the OPR ARCS 432-30 files for the mandated retention period They can be contacted for assistance and guidance during the destruction process.

Destruction Procedure

Information Destruction Application (IDA) Steps	Role
1. Initiate IDA by contacting the Information Management Advisor	Area Support Staff
2. The Information Management Advisor and Area Support Staff work together to identify if records are eligible for destruction.	Area Support Staff/Information Management Advisor
3. Assign and log the IDA destruction number and create a folder for the IDA in ARCS 432-30. Files the following: • IDA Form (ARS518) • File list template (ARS661)	Information Management Advisor
4. Complete the IDA form and file list.	Area Support Staff with the support of the Information Management Advisor, if needed.
5. Verify records are eligible for destruction as per their approved schedules and confirm documentation is complete. Log final copies in their appropriate file and send them for approval.	Information Management Advisor
6. Verify that destruction is appropriate and that records are not needed to meet operational and administrative requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated, and are only destroyed in accordance with their approved information schedules.	Approver
7. Send an email documenting destruction approval to Area Support Staff and Information Management Advisor.	Approver
8. Complete destruction.	Area Support Staff
9. Update the destruction log.	Information Management Advisor

Commitment to Review

The Information Management Advisor and Director of Executive Operations commit to reviewing the Information Destruction Procedures Manual to evaluate its effectiveness annually. Actions to adjust the manual shall be taken when necessary.

Approval of Information Destruction Authorization Model

Name	Title	Date
Brittany Hawkins	Information Management Advisor	January 27, 2023
Jackie Allen	Director of Executive Operations	January 27, 2023
Shannon Salter	Deputy Minister	February 7, 2023