

TELEWORKING - WORKING OUTSIDE THE WORKPLACE

***Do my recordkeeping responsibilities change when teleworking?
No, the same basic principles apply.***



- You need to create and file records that document government business activities, transactions and decisions.
- Records must be easily retrievable in a timely manner by authorized individuals.
- Records must be protected from loss, theft or unauthorized disclosure.
- Destruction of records must be secure, confidential and in accordance with approved schedules.

Records Management Basics

When you are not in the office, it is very important to routinely file your records so that your co-workers have access to them. Don't leave them inaccessible in your individual email folders or personal drive.

This approach keeps related records together. A complete file of a specific activity, case, or topic is maintained, which isn't possible if records are scattered across various individual email accounts, computer drives and convenience files.

When deciding what records you need to file, follow the same steps you would use when working in the office. Start with the question: Is it transitory?

Transitory records are covered by the cross-government [Transitory Records Special Schedule \(102901\)](#). These records are of temporary usefulness and not needed to meet accountability or statutory requirements or to sustain administrative or operational functions. They are commonly:

- ✓ used to complete immediate and minor transactions
- ✓ used in the preparation of revisions or final version of a record
- ✓ kept for only a short period of time for convenience or reference use

Examples of transitory records include:

- **Working materials and non-substantive drafts** not scheduled elsewhere.
- **Duplicate copies** retained for reference purposes.
- **Messages** (e.g., telephone, fax, email, instant messages) **that do not** document a decision, activity, or transaction or add any other information needed to meet financial, legal, audit, or other statutory requirements.

If you decide to keep a copy in your government email account or computer drive for convenience or reference purposes, you need to delete it once that purpose has ended. Do not keep convenience/reference copies longer than the official file version.

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If, however, you have added significant notes, or annotations or other information to the convenience copy that is not captured elsewhere, then you have created a new record, and will need to file it.

What about the security of records?

When working outside the office, use the government network whenever possible to store and access work information rather than printing paper copies. This reduces the risk of unauthorized disclosure or loss. Paper records with personal and/or confidential information require such protections as:

- Obtaining your supervisor's approval to take records outside the workplace.
- Keeping records in secure storage when they are outside the office.
- Destroying confidential records either by returning them to the office and placing them into the locked disposal bins, or by running them through a cross-cut shredder that creates a fine shred ensuring confidentiality before adding the material to home recycling/trash. If working in another government office, use the secure, locked disposal bins provided there.

Reminder! All records that contain sensitive/confidential information, including transitory records, need to be protected and managed securely. Your agency may have specific procedures regarding records security – check with your supervisor.

Also see relevant Office of the Chief Information Office (OCIO) documentation:

- [Working Outside the Workplace Policy](#): provides direction on how to safeguard electronic and paper-based confidential information when working remotely.
- Policy summaries from OCIO's Information Security Branch on topics such as [remote access](#) and use of [portable storage devices](#).

Additional Information

Contact your [Records Officer](#) or check out the rest of the Records Management website.

