Email Tagging Decision Flowchart for external emails only, with workers, employers and providers

Are you the sender of the email? → No → **Are you the recipient of the email?** → No → **You were CC'd in the email**

Are you the sender of the email? → Yes ↓

Are you the recipient of the email? → Yes ↓

Do you need to take action? → No →

Do you need to take action? → Yes ↓

Is there a business need to put the email on file?
Does the email contain information relative to the claim that cannot be documented in a file note, or is this the only way the recipient communicates?

→ Yes / No

Yes ↓

Does the email contain information that may be related to a third party legal action or a FOIP request? → Yes → **Check with Legal or FOIP to determine what should happen with the email.**

No ↓

Consider the email a record, tag it to file and delete it.
Remember only tag the email when the conversation thread has ended.

Transitory document
A document that has short-term use, does not need to be kept and can be deleted when no longer needed.