

# Information and guidance on use of Teams Chat

**Cooper, Kathleen (SAO)**  
Director of Communications

As Auditor McCarthy said in her email to all staff, SAO prides itself on all [all communication](#), regardless of medium, being professional and respectful – as well as managed in accordance with state laws around public disclosure and document retention.

Below you'll find some high-level guidance and links to new documents to help you sort the use of Teams Chat, document retention, and the seven-day chat retention window. This post, and the documents linked within, will reside on the [SAO Records Team's SharePoint Online site](#) for future reference.

These documents are intended to help, but they are not an exhaustive list of what is and isn't appropriate for Teams Chat. We must use judgment.

## **A quick refresher: What is a public record?**

State law ([RCW 42.56, the Public Records Act](#)) describes public records as "Any writing containing information relating to the conduct of government or the performance of any governmental or proprietary function." In other words, public records are things that help the public understand why government does what it does. Along with traditional documents, "any writing" includes emails, voicemails, videos, text messages – and Teams Chats.

[SAO's document retention schedule](#) helps us determine what public records we must keep for how long, and which ones we don't need to keep for public understanding or posterity. This is where the term "transitory" comes in. "Transitory" simply means we don't have retention requirements to keep the record. But Teams Chats are a public record. If a public records request comes in and we still have relevant Teams Chats records, we're required by law to provide them.

## **How do I make sure I don't put something in Teams Chat that should be retained in another way?**

Remember Pat's rules of thumb:

1. Public records are anything that helps the public understand what government does.
2. Even a transitory message could be disclosable if someone makes a public disclosure request.

Here's another tool – a quick test. Ask yourself, is this chat:

- With a person or group of people who are external to SAO, and we will be discussing things that may affect my work in some way?
- Leading to a decision that will affect my work in some way?
- A topic that is likely to come up again and you may need to validate what you communicated?

If you answered yes to any of the above, you probably should not use Teams Chat as a communication channel for those topics.

If you're interested in more information on this, here is a [one-page reference guide](#) and a more in-depth [crosswalk](#) to our retention schedule that can assist you in answering some questions you may have around Teams Chat. Again, these are not exhaustive.

## **What do I do if I think I've put something worth preserving into chat?**

If you receive or inadvertently send communication in a Teams Chat that needs to be retained, make sure to save a copy of the communication outside of Teams Chat. Here's how: On the Teams Chat message in question, click the three dots. You will get this option menu, and you simply click "share to Outlook."

This sends the text from the single chat box as an email. It will not save whole conversations, so you'll have to send messages one by one. (This is another reason to manage Teams Chat well.)

### **Other frequently asked questions:**

- *This is tiring. Why can't we just save the chats for longer than seven days, and have the Records Team search chats like they do emails?*
  - Chats are meant to be used for transitory and/or informational communication only. By keeping chats indefinitely, we would be practicing poor records management as an agency by keeping massive amounts of data that do not need to be preserved.
- *If I must keep a Teams Chat, why can't I just take a snip of it?*
  - A snip, or a screenshot, or other "image-taking" actions, does not preserve necessary metadata of the record. By using the "Share to Outlook" feature, we retain more information necessary to preserve the record.
- *I have a Teams Chat that is a duplicate of something in the work papers for the audit that I am working on. Do I need to keep the chat?*
  - No. If it is a duplicate, copy or a draft of an item that will be preserved in TeamMate, you do not need to retain the chat.
- *A client sent me a message on Teams Chat stating concerns about their audit. How should I proceed?*

- Send that chat to your email using the “Share to Outlook” function. Then, you can continue the conversation with the client from Outlook.

### **More information**

If you have additional questions, please reach out to [Raylene Wilson](#), Legislative and Records Manager.

The Washington Coalition for Open Government also has a [series of short videos](#) on public records, from the perspective of people asking for them. It might be helpful to watch these during your free time to help you evaluate the records you create and work with.

Stay tuned to SAO Central for more public records tips throughout 2024!