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To:	SAO DL All Staff
Cc:	Blair, Teri (SAO)
Subject:	An update to how long SAO will retain Microsoft Teams Chats
Date:	Wednesday, July 10, 2024 8:03:05 AM
Attachments:	image002.png image001.png image003.png

Team SAO,

Last fall we began a discussion on how to best use Microsoft Teams Chat in SAO's business communication. At the time, chats were retained for a period of seven days, which presented a challenge to ensure we "walked the talk" when it comes to transparency.

I've decided our agency will now retain chats for 30 days. This is to ensure we all have a bit of extra time to move any relevant information that must be retained by law out of chat, and memorialized elsewhere (email, work papers, etc.).

We are making this change out of an abundance of caution. But our approach to chats remain the same: SAO-ers are always professional and respectful in our communication, regardless of medium. In addition, SAO-ers manage our records in accordance with state laws around public disclosure and document retention.

Our policy states that Teams Chat is only for transitory communication, but that is a distinction only related to record retention. It means such communication doesn't need to be retained for posterity or other purposes. Transitory communication sounds like, "Have a minute to talk? I'd like to discuss this audit finding." Or, "Meet me at the office building at noon so we can travel to the exit conference together." Or, "I'm having some trouble understanding your edits – and I may disagree. Can we meet?"

(See this link for more details on what type of records must be retained: RetentionSchedule_TeamsChat_Crosswalk.pdf)

Messages like those above can expire or be deleted once they're not needed any more. They're transitory. But if they exist when we get a public records request related to the topic, they are disclosable. Remember this rule of thumb: **Transitory communications need not be retained, but are disclosable in response to a public records request.**

Use of Teams Chat requires professional judgment. Teams Chat helps us work efficiently – but taking care with how you use it will help you avoid burden when managing records.

Over on SAO Central, we've re-posted the expanded guidance on public records, retention and Teams Chat. We've included lots of links for reference. If you have questions, work with your manager and we'll get you answers.

Thank you for your service to Washingtonians.

Pat McCarthy
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