

DRAFT  
November 2023  
Status: Ready for Cabinet feedback and possibly Pat approval

**Proposed Pat all-staff email**

**Subject line:**

How SAO uses Microsoft Teams Chats

**Body of email:**

Team SAO,

At SAO [we expect all communication](#), regardless of medium, to be professional. In addition, our Office value of transparency reminds us how important it is to manage our records in accordance with state laws around public disclosure and document retention. The recent addition of Microsoft Teams Chat as a business tool has helped us as we work remotely, but it also is a new medium that requires ongoing attention to manage well.

To that end, we've put together some high-level guidance to help you sort the use of Teams Chat, document retention, and the 7-day retention window. A new post on SAO Central will go into some detail, and [share two new pieces of guidance that will later it will](#) reside in the [Records](#) portion of the Government Affairs SharePoint Online site.

This guidance is intended to help, but just like a lot of our duties, use of Teams Chat requires professional judgement based on grounding in law and policy. And we must be clear that just because our policy states that Teams Chat is only for transitory communication, that is a distinction only related to [record retention](#). It is not a distinction that matters for public disclosure.

*Transitory communications are disclosable in response to a public records request.*

With that in mind, head over to SAO Central for more. And as always, thank you for your dedication to serving Washingtonians.

Pat

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**Proposed SAO Central Post**

**Headline:**

Information and guidance on use of Teams Chat

**Body of post:**

**Commented [KC1]:** Need further simplification; need layered comms for 7 times / 7 ways; crosswalk is at the bottom of the pyramid (this was a sound document but maybe too much for some folks); what we're missing is that simple clear messaging to start

ALSO NEED TO CONSIDER TIMING/TEMPO of messages

FIRST MESSAGES: Broaden away from chat -- not too broad but connect Chat to values; Start with, we're gonna talk about professional comms and the tools we use; Chat is the newest tool but it's a great time to refresh ourselves on what communication we need to keep and why; what we will disclose and why; and how to make sure you stay on track; tone is breezy

Idea: Adjust messaging further to make clear there's a difference between retention and disclosure

Idea: How to MANAGE chat -- like you do email -- it's OK to ignore it by turning off all the notifications / pings or set a team culture of if it's urgent, TAG ME

Idea: "did you know?" surprising things on the retention crosswalk

Idea: regular SAO Central posts with examples?

Idea: "Get out of chat" phrasing ideas

Idea: Periodic videos -- one recorded on email -- 5 minutes on how to clean up your inbox; one recorded on the retention crosswalk specific to chat; ONCE A QUARTER VIDEOS with a prize!

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As Auditor McCarthy said in her email to all staff, SAO [expects all communication](#), regardless of medium, to be professional, as well as managed in accordance with state laws around public disclosure and document retention. This brings us to Microsoft Teams Chat.

Below you'll find some high-level guidance to help you sort the use of Teams Chat, document retention, and the 7-day retention window. These documents are intended to help, but they are not an exhaustive list of what is and isn't appropriate for Teams Chat. Just like a lot of our duties, this requires professional judgement based on grounding in law and policy.

*Remember: Transitory communications are disclosable in response to a public records request.*

While Teams Chat's GIFs and emojis make it easier for a conversation to feel casual, no business conversation ever is. We can't deny public disclosure of things that are unprofessional or, frankly, embarrassing. So, if you're communicating about things that you'd rather your colleagues, peers, supervisor, clients, or the public not see because it's unprofessional or embarrassing, it's best not to communicate it at all.

#### **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 "transitory" comes in. Transitory simply means we don't have retention requirements to keep the record. But Teams Chats are, by definition, a public record. If a records request comes in and we still have the record, we're required by law to provide it.

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

Here's one 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 should not use Teams Chat as a communication channel for those topics.

It's also possible you answered "no" to the questions above, and you still shouldn't use Teams Chat for what you're planning. So, we've [created a one-page reference guide as well as a crosswalk to our](#)

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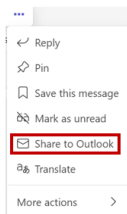
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[retention schedule that will assist you in answering some questions you may have around Teams Chat.](#) [marked up our official records retention schedule with some examples of items that shouldn't show up in Teams Chat.](#) Again, these are not exhaustive.

#### 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 to ensure preservation. Here's how to do it: On the Chat message in question, click the three dots. You will get this option menu, and you simply click "share to Outlook."



#### Other Frequently Asked Questions:

- If I have to 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 as well.
- A client sent me a message on Teams Chat stating concerns about their audit. How should I proceed?
  - Use the "Share To Outlook" function and send that chat to your email. 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.

[Please take a few minutes to check out our new Teams Chat Guidance.pdf as well as the RetentionSchedule TeamsChat Crosswalk.pdf.](#)

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 to help you evaluate the records you create and work with: <https://www.washcog.org/video-resources>

**Commented [W(2)]:** I am not a huge fan of the videos. I would prefer to point staff in the direction of materials we have created.

**Commented [KC3R2]:** There is no harm in doing both.

**Commented [KC4R2]:** I'm also investigating whether SOS has anything helpful -- there is SO much on their website that it's overwhelming.

**Commented [W(5R2)]:** SOS has really helpful retention videos, but as far as Teams Chat specific....not really. They focus on "retain content that needs to be preserved regardless of medium".