





# ADMINISTRATIVE PROCEDURE

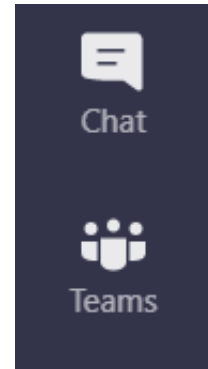
<b>SECTION:</b> 600 – Information Technology	<b>PROCEDURE #:</b> 601 - B
<b>TITLE:</b> Microsoft Teams Chat	<b>IMPLEMENTS POLICY #:</b> 601
<b>SPONSORING DEPARTMENT/DIV:</b> Support Services - Information Technology Services	
<b>EFFECTIVE DATE:</b> 4/12/2021	<b>REVIEWED:</b> 4/12/2021

**OBJECTIVE:** To establish procedures for protecting and maintaining the County’s public records and other information from the risks created when using Microsoft Teams Chat instant messages at Washington County.

## BACKGROUND:

Microsoft Teams delivers advanced security for messages that are sent and received within the Office 365 application. All communications within Teams are encrypted in transit and at rest. As key elements of the collaboration tool, Microsoft Teams application has two main ways to send and receive messages:

(1) Chat  messaging and (2) Teams  posts (or “Channel Conversations”). All items located under the “Chat” section of the application are instant messages. This procedure focuses mainly on Chat messaging function of Microsoft Teams application.



## CHAT MESSAGING PROCEDURES:

### 1. Guidelines for Acceptable Use.


- 1.1. Chat messages sent or received **between individual users** in the course of conducting County business must be retained in accordance with Public Records retention rules.
- 1.2. As a best practice, users should use email (encrypted email if corresponding with an external user regarding confidential, sensitive, and/or protected information) rather than chat messages when the content is:
  - 1.2.1. Subject to public retention laws; and/or


1.2.2. Includes confidential, sensitive, and protected information.

The decision matrix below demonstrates which method of communication is appropriate between individual users:

Information Type	Retention	Sending to recipients that are	
		Internal	External
Communication contains <b>no</b> confidential, sensitive and/or protected information and	communication is <b>not</b> subject to retention	Chat or Regular Email	Chat or Regular Email
	communication <b>is</b> subject to retention	Regular Email	Regular Email
Communication <b>contains</b> confidential, sensitive and/or protected information and	communication is <b>not</b> subject to retention	Regular Email	Encrypted Email
	communication <b>is</b> subject to retention		

**2. Guidelines for Public Records Retention - Managing and Retaining Chat Messages that are Public Records**

2.1. The County retains all data that are sent or received within the Teams  section of the application until the owner of the Team deletes it.

2.2. The County has a default 1-year retention policy for all messages in the Chat  section of the application between individual users that are sent or received. Messages in “Chat” which are older than one year will be automatically deleted.

2.2.1. If a chat message requires longer-term retention, it must be manually copied and saved to the user’s desired network location. [Here](#) are detailed instructions.