

To: Pat McCarthy, State Auditor
From: Raylene Wilson
Date: August 30, 2023
Subject: Retention of TEAMS chats

Summary

SAO has written policies related to retention of records. The purpose of this memo is to document the decision made to continue with a 7 day retention period for TEAMS chats.

Retention Policy of Microsoft Teams Chat

A 7 day retention policy was applied to Microsoft Teams Chat tenant wide when state agencies first implemented the software. This decision was made by the WARIM group. At the time, Microsoft only allowed one retention policy to be applied to the entire tenant.

WaTech informed the eDiscovery group August 2023 that Microsoft is now allowing multiple retention policies for Microsoft Teams Chat and each state agency may apply a different policy if they choose to do so. As have many state agencies, SAO has made the decision to stay with the 7 day retention policy.

Retention Policy Decision Reasoning

Teams Chat is to be used for informational/ transitory communication items only. SAO has captured these expectations in the SAO Records Management policy, SAO Central News postings and the Records Management training. These expectations have not changed therefore SAO does not have a need to adjust the retention policy for Teams Chat.

In addition, there would be negative repercussions to the PRR teams workload by adjusting the retention policy to a longer length than 7 days. The amount of time needed would be extensive to run the search, export the information and conduct a 1st review and 2nd review for content that is transitory.

Cc: Members, SAO Executive Team