



ADMINISTRATIVE PROCEDURE

SECTION: 600 – Information Technology	PROCEDURE #: 601 - B
TITLE: Microsoft Teams Chat	IMPLEMENTS POLICY #: 601
SPONSORING DEPARTMENT/DIV: Support Services - Information Technology Services	
EFFECTIVE DATE: 4/12/2021	REVIEWED: 2/12/2026

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 at Washington County.

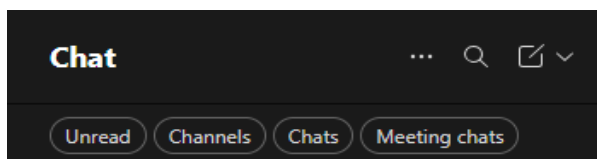
BACKGROUND:

Microsoft Teams (“application”) Chat ensures robust security for all messages sent and received within the Office 365 ecosystem. Communications are fully encrypted, both in transit and at rest, providing strong protection for sensitive information.



All items located under the application “Chat” section are instant messages. As a core component of the Office 365 collaboration suite, Microsoft Teams offers four primary methods for exchanging messages and information:

- (1) Teams Chat messaging Person to Person and/or Group Chat (“Personal Chat”)
- (2) Teams Channels Chats (“Channel Chat”)
- (3) Meeting Chats (“Meeting Chat”)
- (4) Chat File Sharing (“Chat File”)



“Teams owner” is defined as the individual who either created the Teams collaboration site or initiated the chat conversation.

CHAT MESSAGING PROCEDURES:

1. Guidelines for Acceptable Use.

- 1.1. Chat messages sent or received between individual users while 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) rather than chat messages when the content is:
 - 1.2.1. Subject to Public Records law; and/or
 - 1.2.2. Includes Restricted or Confidential 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 no Confidential Information. and	Communication is not subject to retention under ORS 166-150-0005 (10)	Chat or Regular Email	Chat or Regular Email
	Communication is subject to retention under ORS 166-150-0005 (10)	Regular Email to authorized recipients only	Regular Email to authorized recipients only
Communication contains Confidential, Information and	Communication is subject to retention under ORS 166-150-0005 (10)	Regular Email to authorized recipients only	Encrypted Email to authorized recipients only

2. Guidelines for Public Records Retention: Managing and Retaining Chat Messages

- 2.1. Channel and Meeting Chats. The County retains all data, including chat messages and chat files sent or received within Teams Channels and Meeting Chats, indefinitely, or until the Teams owner deletes it.
- 2.2. Personal Chats (One-on-one or Group Chats). The County has a default 1-year retention policy for personal chat messages. After 1-year, these chat threads are automatically deleted.
 - 2.2.1. Extended Retention Requirements. If a chat qualifies as a public record and must be retained beyond the 1-year default, it is the responsibility of the Teams owner to:
 - Manually save the conversation to an alternate storage location

- Ensure the alternate location has a retention policy that meets or exceeds the required retention period.