

State of Michigan Records Management Services

Guidance: Instant Messaging (IM)

Microsoft Skype for Business is an instant messaging (IM) tool that State of Michigan (SOM) employees can use to support their official work duties. Skype can be used to have textual conversations, as well as audio and video conversations. Documents and computer desktops can be shared using Skype. Skype records the IM conversations and saves them in the "Conversation History" folder in the user's Microsoft Outlook account.

IM conversations created using Skype to document official SOM business are official SOM records. Official records must be managed in accordance with approved records Retention and Disposal Schedules.

Many IM conversations can be destroyed per General Schedule #1 for non-records (if they document preliminary drafts of official records, and do not document decision-making), or per General Schedule #5.01 for transitory records (if other records contain the same information and will serve as the official record). **However, these schedules cannot be applied universally to all IM. The content of the record determines its retention period, and there will be many IM conversations that are covered by other general and agency-specific schedules.** IM is just another record format (like paper, digital images, word processed documents, spreadsheets or e-mail), so there is no single retention period for these conversations. Ultimately, applying Retention and Disposal Schedules appropriately is the responsibility of individual SOM employees. Individual departments or offices may need to adopt their own policy about IM to provide more specific direction to employees about the appropriate use of IM and recordkeeping requirements for IM. Information about Retention and Disposal Schedules is available from the Records Management Services' website, <http://www.michigan.gov/recordsmanagement/>.

If an agency receives a litigation hold or Freedom of Information Act (FOIA) request, destruction of all relevant records to that request (including IM) must be suspended until the request is fulfilled or all litigation activities are completed. Please contact the Department of Attorney General if you need additional information about FOIA or litigation. As with e-mail, SOM employees should ensure that they do not transmit confidential or sensitive information using IM tools.

E-mail account size limits will be impacted by the amount of IM conversations that are stored, so employees do need to actively manage the messages and conversations in their account. Employees who need assistance or additional information about applying record retention best practices to e-mail and IM should take the **free online E-mail Retention Training** (<https://dmbinternet.state.mi.us/DMB/EmailRM/story.html>) that is offered by Records Management Services.