

Electronic Records Management: Managing Public Records Created or Received as Text Messages

Purpose: Provide guidance to state agencies and local government entities on the basic steps to managing public records that are created and/or received as text messages.

There are three essential steps:

1. Develop Policies and Procedures for Texting

Each agency must make and document some key policy and procedure decisions in order to manage their public records that are created and/or received as text messages, such as:

- What type of agency business (if any) is appropriate to be conducted via text messaging?
- Who in the agency can conduct agency business via text messaging (e.g., elected officials, executive management, line employees, etc.)?
- Is conducting agency business via text messaging allowed using personally-owned devices or only using agency-owned devices?
- With public records created and received as text messages, how is the agency going to:
 - Capture the text messages?
 - Retain the text messages for the minimum retention period in accordance with current approved records retention schedules?
 - Destroy/Transfer those text messages once their minimum retention period has been met?
- How will the agency enforce these policies and procedures?

2. Train Agency Personnel

Agencies must ensure that everyone who is part of the agency (elected officials, executive management and all employees):

- a. Is aware of their agency's policies and procedures;
- b. Understands their responsibilities; and
- c. Knows how to comply with the policies and procedures.

3. Monitor Compliance

Finally, the agency needs to be able to demonstrate that it is routinely and systematically complying with its own policies and procedures through a process of monitoring and auditing.

**Additional advice regarding the management of public records is available from
Washington State Archives:**

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**