WARIM September Forum

Meeting date | time *9/9/21 |10:00 AM* | Meeting location *Teams Meeting*

Recorded	Yes, link here
Facilitator	Davis Needham
Note taker	Julia Marshburn

AGENDA TOPICS

WARIM Structure Updates

The meeting began with a conversation around the current state of the structure of WARIM. Historically, this group has been a place of support, to share resources and information among the records community. It has been an informal meeting place where staff with similar positions within different agencies can connect. With the implementation of O365, and the added challenges of a shared tenant environment, WARIM has become an advisory body for standards in records management across the state. One focus for the forum is to establish a structure, so when future decisions are brought to WARIM, there is a fair and transparent decision-making process to stand behind.

Members have stepped forward to help establish this process, with the intention of holding a formal vote for these appointments in spring 2022. WARIM is looking for additional subcommittee members to strengthen the decision-making process to broaden the voices beyond the board. Chairs of specialized subcommittees (subject matter experts) can weigh in and vote on issues that are brought to WARIM by outside organizations (such as WaTech, Cloud Enablement Advisory Committee) in addition to the board. Board members are working on a draft charter and hope to have a final draft to review in spring 2022, prior to the vote.

The goals for these changes are to:

- Keep WARIM's momentum – Having a seat at the decision-making table is a great opportunity to escalate the concerns/expertise of the record and information management community.
- Speak with one voice – Creating a board and identifying subcommittee chairs provides an informed foundation to make decisions swiftly, as sending surveys via email to the entire WARIM body yields a low response rates and slower timelines for final decisions.
- Improve Communication – WARIM will act as a central hub for standards of records management.

Current Board Members:		Proposed Committees	
Board Chair	Davis Needham		Website
Vice Chair	Megan Jackson		O365
Board Administrator	Julia Marshburn		Training
Strategic Director	Bruce Wirth		Education
Former Chair	Carissa Bourdon		Technical
			Programs

If you wish to join or chair a WARIM subcommittee, please contact julia.marshburn@rco.wa.gov

Vaccine Verification Records

With the recent proclamation 21-14.1 requiring vaccination against COVID0-19 as a condition of employment for most state workers, a discussion around how agencies were documenting and verifying these records.

The following are some examples of what agencies are doing:

- All AAGs have been given information about records disclosure regarding this situation, reach out to your agency's AAG for further direction.
- Delete emails after HR has received and confirm an employee's request for verification
- Employees should not send screen shots or scans of vaccination records to HR
- Teams meetings are arranged (on a 1:1 chat level) with a non-descript appointment title (e.g., Quick Chat). The vaccination verification document is shown over the video meeting and the employee is tracked on a localized spreadsheet (with a yes/no or similarly simple check box)
- Records of employees who ask for a medical exemption are filed as "Workplace Accommodations" and saved in their personnel file.
- Records of employees who ask for a religious exemption are placed on legal hold to prevent noncompliance in case of litigation.

Questions that arose during the discussion:

- How are you monitoring the records created around the discussions of employees are not adhering to the mandate?
- What kinds of records are out there?
- When *DAN GS 03058 Covid-19 Verification Records* was created, there was no mandate. How should the records of people seeking exemptions be handled?
- This is a continually evolving situation, with possible litigation involved, how are you preparing to handle public records requests and litigation?
- Has Washington ever had a statewide litigation hold? Should we be preparing for litigation?

Teams Meeting Recordings

Microsoft is turning on an auto-delete feature for recordings made during Teams meetings. Teams meeting recordings will be automatically deleted after 60 days. This feature will be turned on anytime between now and November 2021; the actual date is unknow, and will not be announced by Microsoft prior to the change being implemented. The only way to circumvent the auto-delete feature is to apply a retention label to a recording, apply a retention label to the folder where recordings are stored, or move the recording to a location with a retention policy applied to it.

WARIM has been asked to come up with a recommendation on how to navigate this auto-delete feature. The board proposes WARIM members vote for one of the following options. The following options affect the whole tenant, and cannot be scaled to fit individual agencies.

When Auto- Deleting Meeting Recordings After 60 Days is implemented, WARIM should:

1. Do nothing – Instruct end-users of the change and how to save recordings if they are needed beyond 60 days
2. Change the auto-delete setting to a longer expiration date - inform end-users of the change and give WARIM more time to formulate a permanent solution / create best practices for end users, but ensuring records are deleted after some time

3. Change the auto-delete setting to never delete – Users would have to manage all meeting recordings

Questions:

- Is there value to an auto-delete setting?
- Does this un-train staff to use labels to manage their records?
- Whose responsibility is it to manage recordings made on Teams Channels?
- Can you limit who can make meeting recordings?
- How will saving meeting recordings effect storage costs?

A representative from the Secretary of State shared a guidance document with examples of meeting recording retention based on the content of the recording, this table is included in the guidance document sent from the WARIM Technical Team. Members were asked to vote in chat during the meeting, or over email afterward.

Good for the Order

There was some discussion around One Drive morphing from a personal file/transitory file repository to a business-related storage space. Some agencies have applied a 2 year by label date then delete to their staff's One Drives, others have left retention labels up to users to apply to their One Drives.

Some concern was expressed by a WaTech representative when they discovered some mailboxes were not transferred over from the Vault to Outlook Online. This error was discovered by a user, and they had to re-import the mailboxes. This was viewed as a great use-case example for creating a special use label, an Emergency label.