

WRAPPING UP YOUR MEETING

The following tool is intended to help you properly save and retain all required records from your teams meeting.

IMPORTANT NOTE: *Following the steps outlined below is critical as failure to comply in this area may result in the removal of MS Teams for external customer interactions for you and others.*

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In addition to following your standard case documentation process in ETO, the following instructions will walk you through storing all MS Teams generated records, to ensure appropriate and required retention.

1. **MEETING CONCLUDED-** allow your customer to leave the call
 - a. The EC employee should not leave or end the call prior to completing all required steps
2. **RETENTION REQUIREMENTS AND PROCESS FOR TEAMS MEETING WITH CLIENT:**
 - a. All generated public records during this meeting would be retained under Federal Programs- Individual Client Folder records series.
 - i. This is a six-year retention from the end of the fiscal year
 - b. Follow standard EC process for constructing your case file in the Efforts to Outcome (ETO) case management system or in electronic/hard copy case file outside of ETO.
3. **SAVING CHAT CONVERSATIONS:**
 - a. You will need to copy the entire chat bar conversation, from the words “Meeting Chat” at the top, to the end of the conversation string
 - b. The Chat conversation should be pasted into the ETO system or in an electronic case file outside of ETO.
4. **SAVING SHARED DOCUMENTS:**
 - a. Documents should not be attached/shared in teams. However, in the event they are, they should be saved in the same location as the chat conversation.
 - i. *This includes any uploaded and/or attached documentation (image, file, etc.) from the client during the meeting.*
5. **DELETING MEETING CHAT RECORD:**
 - a. Once all public records have been saved appropriately, the Teams Chat becomes a transitory record and does not need to be retained
 - b. The EC. Employee can hide/delete the chat from their Teams Dashboard
6. **RECORD RETRIEVAL:**
 - a. The ESD Records Disclosure Unit (RDU) can use the existing process to retrieve and disclose these EC client records if the above procedure is followed. It does not change RDU’s process.
 - b. These are technically public records but are not open to public disclosure. These records and information are private and confidential under [RCW 50.13.020](#).

