Process for Documenting Instant Messages, Text Messages, and Voice Mails

Records Management Group (RMG)

*A transitory record is a record of *temporary usefulness* that is not essential to the fulfillment of statutory obligations, not regularly filed within an agency's recordkeeping system, and is only required for a limited time to complete an action. For example, when an employee and their supervisor exchange multiple messages in order to specify a time and date for a conference.

DFPS staff are authorized to determine if a record is transitory. If you need assistance in making a determination, please contact DFPS Records Management Group

Instant, text or voice mail message sent or received

Is the message transitory?*

Yes → Delete the message as soon as it is no longer needed.

No

What kind of message is it?

Lync → Follow the HHS Instant Messaging Policy (Lync)

Text message →

Within one business day after receipt, capture the text message and forward it to your DFPS e-mail:

Option 1: Take a screenshot of the text message and e-mail the photo to your DFPS e-mail address, or;

Option 2: Forward the text message itself to your DFPS e-mail address.

Click here to find detailed instructions for both methods.

→ Delete the originally received message

Voice mail message or Non-Lync Instant message

Capture the following information regarding the message:

1. Name of originator and receiver(s)
2. Date and time the message was sent or received
3. The type of message (instant or voice mail)
4. A brief summary of the message—an exact transcription is not required

→ Record the information:

1. If case-related, record in IMPACT or CAPPS in a contact
2. If not case-related, but must be retained for business purposes, record on your DFPS computer's H drive.

→ Delete the originally received message