

Text & Instant Messages

Are texts and IMs government records?

Delivered

Yes. If a message is created or received in the course of doing government business, it is a government record.

Text and instant messages, such as MS Teams Chats, allow for real-time communication that can be quick and convenient. It is important that all staff have a clear understanding of acceptable use guidelines and their recordkeeping responsibilities when texting or messaging.

Government records are defined as recorded information in any form, created or received in the conduct of government business, and kept as evidence of activities and decisions.

Departments are responsible for records and information management and all public servants have a responsibility to ensure that the actions and decisions of government are documented and the records are captured in a [recordkeeping system](#).

Understanding risks and creating a policy

The methods we use to communicate are not always the best methods to capture records as evidence. Using text messaging might be convenient in the moment for sending or receiving information; however, the convenience may be overshadowed by the effort involved in converting the message into an appropriate record if required.

As with all recordkeeping issues and decisions, risks should be assessed in the context of the activities performed, recordkeeping requirements, and business/public expectations of accountability and good governance. Policy decisions about the use of messaging should be documented and clearly communicated by management to all staff. Some departments may decide that certain activities can be conducted via text, instant, or social media messaging, whereas other areas may determine that the risk is too high to allow even [transitory](#) use.

A few things to consider when determining whether or not staff should be using text or instant messaging to conduct government business:

- All staff are responsible for managing the records they create or receive.
- Each program area or work group should determine what records must be created and what records are [transitory](#). These decisions must be outlined in up-to-date records schedules and internal procedures. Text and instant messages will fall into these established protocols.
- Government systems, devices, and messaging applications should be used at all times to conduct government business. In exceptional circumstances where personal accounts or devices are used, the records created are still government records and must be managed as government records.
- All government records, including transitory records and regardless of device or application used, are subject to legislation including *The Archives and Recordkeeping Act*, *The Freedom of Information and Protection of Privacy Act*, *The Personal Health Information Act*, and *The Manitoba Evidence Act*.
- Even the lowest value records for one government employee or official may be considered [high-risk/high-value](#) for another, depending on the role in government and the activities and decisions made. Policy decisions need to be made within this context.
- Questions about government-authorized mobile devices and the appropriate use of technology should be directed to Digital and Technology Solutions (DTS).

The Government Records Office recommends that the use of text and instant messaging be limited to [transitory](#) messages only, particularly where the functions of the office are [high-risk/high-value](#).

This should be considered the default policy when there is no department or program-specific policy in place for the use of text and instant messaging.

What to do when texts or IMs need to be captured

A text message or an instant message left in its application poses a number of recordkeeping, privacy, access, and security risks. As soon as possible, convert the message to a format that can be captured in your program area's recordkeeping system.

There are several procedural or technical ways to capture a series of text messages:

Step 1

- write a memo, note, or email summarizing the exchange; or
- take a screenshot of the exchange.

Step 2

- ensure the new format includes key metadata such as names, dates, context for the discussion, and the decision/transaction that resulted;
- if a government decision/transaction grew out of a non-government conversation, include some basic information about that conversation to provide adequate context.

Step 3

- capture the reformatted and contextualized information in an approved recordkeeping system for the program area.

The goal is to create an authentic, reliable, trustworthy record that can be managed with other related records in the usual and ordinary course of business and according to the provisions of an approved records schedule.

Once the record has been converted and captured, the original message may be treated as [transitory](#).

Related Guidance:

[Creating and Capturing Records](#)

[File Structures](#)

[Microsoft 365 – Teams: Recordkeeping Guidance](#)

[Transitory Records](#)

References:

Archives New Zealand, *Text messages and other communications*. <https://www.archives.govt.nz/manage-information/how-to-manage-your-information/digital/text-messages-and-other-communications>.

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