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Review Responsibility: Executive Council

FCCS POLICY & PROCEDURE

NO.: 12C.15

**SUBJECT: Responsible Use of
Microsoft (MS) Teams**

**Approved by: Executive Council
Effective Date: August 13, 2021
Date(s) of Revision:
Applies to: All Staff**

The responsible use of MS Teams requires professional etiquette and the maintenance of confidentiality in all aspects of our business environment, tools, and systems. MS Teams is used as a collaboration tool and is not the system of record. All relevant case content and decisions shall be appropriately documented within the case record.

- 1) **Client and Case-Related Communication Content:** Due to the confidentiality of client information there are two limitations on the use of MS Teams regarding client content:
 - a) **Written Messages within MS Teams:** Chats, channel posts/announcements and conversations shall not include client-identifying information, but may be used only for general chat, clarifying questions, simple responses etc.
 - The ongoing and unlimited conversations contained within MS Teams will comply with a seven-day retention schedule. All conversations that reach seven days of age will be automatically deleted from the conversation thread. This does not include files stored in MS Teams.

- b) **Video Recordings:** videos with clients or discussing specific client content shall not be recorded. All recordings are automatically saved and stored within MS Teams.

2) Business-related information within MS Teams:

- a) **Transient information** (i.e. draft meeting minutes, recordings for minutes, working documents, etc.) will be purged from Teams regularly according to agency Records Management policies.
- b) **Non-transient information**, (i.e., finalized documents or minutes, etc.) should be saved in the approved system of record. Non-transient recordings (i.e., All-Staff, Human Resources needs, etc.) will be uploaded to Stream by the Communications Dept. or archived according to Records Retention guidelines.

3) Confidentiality:

- a) All participants interacting within MS Teams must follow the agency's consistent practices to maintain confidentiality of all client information.
 - i) 1H Confidentiality
- b) The agency has provided support in creating certain training videos prior to this policy development. Specific case information was used in the creation of these videos. The videos may still be utilized for educational purposes only until software is obtained to blur case sensitive information.

4) Professionalism

- a) MS Teams is a platform to Chat, Meet, Call, and Collaborate and participants are expected to adhere to agency policies related to professionalism. Electronic information created using agency issued services may be read or listened to by individuals other than the audience for whom the information was intended.
 - i) 4A Professionalism/Code of Ethics
 - ii) 4B Professional Code of Conduct
 - iii) Guiding Principles
 - iv) 12C01 Responsible Use of Technology

5) How to request an MS Team

- a) The following groups are eligible to request a Team
 - i) Divisions
 - ii) Departments

- iii) **Committees**
- iv) **Other approved groups, etc.**
- b) **For additional information, please visit the MS Teams Services Locator page.**