

# ONLINE CONFERENCE PLATFORM RECORDS

### ONLINE CONFERENCE PLATFORMS DEFINED:

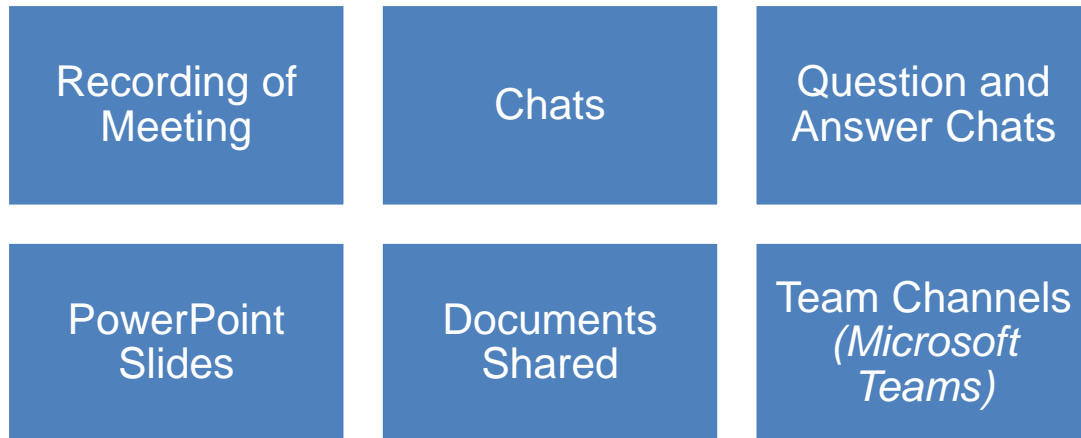
With more offices working and connecting remotely, online conferencing platforms like Zoom, Microsoft Teams, GoToMeeting, and Skype are being used to connect employees and share information. These platforms present a new records retention challenge with the options to record meetings, provide interactions like chats and Q/A, as well as share files during the meeting.

### RECORDS RETENTION CONCERNS WITH CONFERENCING PLATFORMS:

- Recordings, chat logs, and documents shared through conferencing platforms may be a record of your office if it meets the definition defined in ORC 149.011(G). This also means that these records should be retained per the content of the recording per your office's records retention schedules; not by the format as not all recordings concern the same thing or should be retained for the same amount of time.
- Conferencing platforms are not document repositories, so recordings that need to be retained should be saved to another shared, networked location of your office.
- Often conferencing platforms have autodeletion settings. Therefore, if recordings need to be preserved per your office's records retention schedules, they need to be saved before it is autodeleted.
- Some platforms like Microsoft Teams will autosave recordings, chats, files shared, and other interactions from your teleconference to cloud storage like OneDrive and/or Office 365. Saved interactions could be considered records.
- If it is not the desire of your office to autosave recordings, chats, files shared, and other interactions from your teleconference, your office should review the default policies of the platform and edit or disable such policies.
- Like other records of your office, recordings may have to be produced in a public records request or are discoverable during litigation. Preserving these records under a litigation hold should be discussed with your IT services and legal counsel.
- Be aware of potential privacy implications with online conferencing if sensitive or confidential information (FERPA, HIPAA, CPI, etc.) is shared and/or viewed during the recording or seen in the background of the participant's video feed.
- Recordings are often very large file formats, so there will need to be dedicated file storage provided by your IT services to assure there is enough storage space to retain these records. Before you start recording meetings, make sure you have identified the appropriate retention period/schedule for these recordings.

## TYPES OF RECORDS THAT CAN BE PRODUCED THROUGH ONLINE CONFERENCE PLATFORMS:

There are several records that could be produced through online conferencing platforms. These records may need to be retained per your office records retention schedules, so understanding how you can preserve these records, either by IT policies or downloading copies, is very important.



## HOW TO APPROACH RECORDS RETENTION OF CONFERENCING PLATFORM RECORDS:

Similar to how you cannot retain all emails the same way, we must retain the records produced through the use of online conferencing platforms based on the content of the meeting; not the format or creator. This means that any policies set up for the platform must be able to conform with your office's various records retention requirements. Some things to ask when these platforms are used:

Is the meeting being held for ease of communication or is it statutorily required?

- Similar to picking up the telephone to call someone, use of a conferencing platform could be simply transitory in nature and would not need to be retained; In this case, do not record such communications.
- If the meeting is required by statute, such as a school board hearing, then the meeting should be documented either through a recording, meeting minutes, or a combination of both.


Does your office transcribe meeting minutes from the online meeting?

- If your office transcribes minutes after a meeting, you may not have to maintain the recording. The recording is simply being used to refresh one's memory of the meeting.
- If the meeting minutes reference points in the meeting recording, then you will want to retain a copy of the recording to have a full, complete record.
- Documents shared during the meeting or attached to the original meeting agenda should be retained along with the meeting minutes.

What purpose is the meeting?

- Is this a staff meeting, open hearing, webinar training, etc.?
- Determining the purpose of the meeting will help determine the appropriate records retention schedule to apply to the records produced from the meeting.

**WHEN TO RECORD V. NOT TO RECORD:**

Record	Not Record
You intend to post a digital recording of the meeting online for a public or select audience to watch after the fact.	If you wouldn't record the meeting if it were in-person, there is no reason to record it online.
You expect that you will need to repurpose the meeting recording, such as by making a live training session to one audience available to other audiences.	If your participants need to be de-identified, such as for a research project or to maintain anonymity of attendees. There are often options to turn off cameras, retain only the audio, voice-to-text transcript, or chat transcript.
You would have recorded the meeting anyway in the ordinary course of business, even if you were conducting it in person or by telephone.	If you conduct the same training session multiple times.
You expect that certain critical invitees will not be able to attend the meeting, and it would be insufficient simply to provide them with a slide deck, minutes, notes, or briefing of the meeting after the fact.	
You find during the meeting that one or more attendees is having Zoom connectivity problems, and it would be insufficient simply to provide them with a slide deck, minutes, notes, or briefing of the meeting after the fact.	

