

Management and Retention of Public Records and Social Media

Best Practices

For More Information:
<http://publicrecordsboard.wi.gov> or
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Records Management and Social Media

Social Media Overview

The role of technology in the 21st century workplace is constantly expanding and now includes social media tools that facilitate interactive information sharing, interoperability, and collaboration.

Government units can enhance their communication strategies by using social networking sites and platforms. Social networking can improve interactivity between public employees and constituents and often reaches populations that do not use traditional forms of communication such as email or government websites.

In doing so, however, government units should take care to choose social media platforms that make the most sense for their type of information in order to provide more information across multiple outlets to the broadest audience. All communication tools should be used in ways that maximize transparency, maintain the security of the network, and are appropriately professional. Social media is no exception.

This document is not meant to address one particular form of social media, but social media in general to accommodate rapid technology changes and the emergence of new tools. The guidance in this document does not apply to tools used for document sharing, such as SharePoint or Box.

What is Social Media?

Social media integrates web technology, social interaction, and user-generated content. It typically features content that is shared, interactive, internet-based, personal, and informal.

Social media depends on mobile and web-based technologies to create highly interactive platforms where participants can share, co-create, discuss and modify user-generated content.

When is a Social Media Record Created?

Public Records are created when information is:

- Posted externally
- Communicated internally via the use of online collaborative tools
- Posted to a government site by the public

Posts or messages on a social networking site or platform that meet the applicable definition of a public record need to be maintained pursuant to records retention laws, [Wis. Stat. § 16.61\(2\)\(b\)](#) and [Wis. Admin. Code ch. Adm 12](#).

Wisconsin Public Records Board (PRB): Protecting the legal, financial and historical interests of the state in public records.

Identifying a Social Media Record

Posting on Social Media creates a record. It may need long term retention if:

- Conveys official government unit information.
- Contains evidence of the government unit's policies, procedures, or mission.
- Has been authorized by the government unit or contains information for which there is a business need.
- Contains feedback, such as public comments or posts, received via social media.
- Contains intra-office communication needed to document decisions made or actions taken.

Information and posts typically NOT considered a public record are those that are access/reference copies, or duplicates of official records already being retained elsewhere.

Social Media Best Practices

Understand current policies: Prior to using social media, make sure you understand your government unit's current policies and procedures.

Identify public records and platforms: Identify and document what constitutes a public record in social media platforms used by your government unit. Also identify intra-office communication tools where records might be created, such as instant messaging platforms, and therefore need to be retained and managed.

Content management: Clarify custodian of content and responsibility for managing the records.

Training: Communicate records policies and provide training on how social media records will be managed.

Monitor usage: Monitor the ongoing use of social media platforms.

Monitor the landscape: Incorporate recordkeeping practices and requirements into terms of service with third-parties when possible. Monitor any changes to third-party terms of service on social media platforms that may affect the management of records.

Common Social Media Sites and Platforms

Social media sites and platforms frequently change. Even though social media providers may discontinue service or remove information, records retention responsibilities remain the same. This may require specific procedures for long-term records management and retention.

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| <ul style="list-style-type: none"> • Facebook • Twitter • Instagram • YouTube • Slack • LinkedIn • Skype | <ul style="list-style-type: none"> • Blogs • Instant Messaging • Photo libraries • Video sharing |
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How Do I Manage Social Media Records?

The following records schedules most often apply to social media posts or messages:

GRS ADMIN200 and ADMIN201 – Staff Correspondence

GRS ADMIN352 – Short-term Routine Correspondence

GRS ADMIN353 – Complaints (External)

NOTE: If the record is related to a specific program, the record should be managed under a program-specific RDA. Your agency may **only** legally dispose of records as approved by an authorized RDA when there is no litigation, audit, or open records request pertaining to the records.