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DEPARTMENT OF DEFENSE

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OFFICE OF PREPUBLICATION AND SECURITY REVIEW

SEP 27 2023

MEMORANDUM FOR SENIOR PENTAGON LEADERSHIP
COMMANDERS OF THE COMBATANT COMMANDS
DEFENSE AGENCY AND FIELD ACTIVITY DIRECTORS

SUBJECT: Use of Text Messaging on Mobile Devices and Records Management of
Electronic Messages

This memorandum establishes an approved method for DoD personnel to conduct government business via text messaging on both government owned and non-government owned mobile devices. The following guidance establishes a method for ensuring the retention and management of text messages that qualify as records under the Federal Records Act.

Effective immediately, when conducting government business DoD users of government-owned mobile devices and non-government-owned devices must use Microsoft Teams Chat for text messaging as the designated fully managed DoD Mobile Enterprise System. For use on government-owned mobile devices, Microsoft Teams Chat will be available as a managed application controlled by an enterprise management system. For use on a non-government owned mobile device, Microsoft Teams Chat will be used in accordance with DoD CIO memorandum of August 10, 2022, "Use of Non-Government Owned Mobile Devices." DoD service providers will configure Microsoft 365 to manage records created or received by Microsoft Teams Chat in accordance with applicable approved records schedules. Once configured, records created or received in Microsoft Teams Chat will be managed within the application and no additional copy of the record will be required.

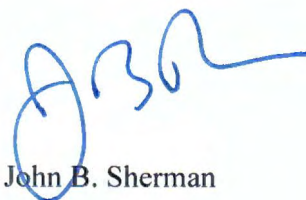
When mission needs or the effective conduct of DoD business cannot be adequately supported by Microsoft Teams Chat, SMS texting may be used in accordance with DoDI 8170.01. In such cases, a complete copy of the record must be forwarded to an official DoD electronic messaging account of the user within 20 days of the record's original creation or transmission in accordance with Section 2911 of Title 44 U.S.C, and Component processes. The complete copy of the record includes the content of the message and required metadata, and the record must be retrievable and usable in compliance with the applicable retention schedule approved by the Archivist of the United States. DoD Component heads shall ensure that DoD users are provided guidance on their Component's processes for forwarding complete copies of records originating in SMS texts. Additionally, in accordance with DoDI 8170.01, DoD Component heads may approve the establishment of non-DoD controlled electronic messaging services accounts by authorized users for public communication related to assigned duties (e.g., recruiting) or any other purpose determined necessary and in the interest of DoD.

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While Microsoft Teams Chat is designated as the primary DoD capability for messaging, DoD Component Heads may approve the use of other messaging capabilities, provided the use of those alternative capabilities complies with DoDI 5015.02, DoDI 8170.01, and applicable DoD CIO memoranda. Service providers should collaborate with Component Records Officers to ensure compliance.

Any electronic messages that are Federal records and that were created or received on government-owned mobile devices prior to the date of this memorandum and not already captured for lifecycle records management must be captured and placed under records control, including electronic messages saved on mobile devices turned in by users as directed in Deputy Secretary of Defense (DSD) Memorandum, "Records Management Responsibilities for Text Messages," August 3, 2022. Component Records Officers may assist with any questions on applicable retentions consistent with the Component's established policy and schedules approved by the Archivist of the United States. Attachment A provides additional implementation guidance for Component Records Officers. Any electronic messages that are Federal records and that were created or received on non-government owned mobile devices must comply with DoDI 5015.02 and 8170.01.

The DoD CIO point of contact for this memorandum is Mark Patrick, DoD Records Officer, [REDACTED]



John B. Sherman

Attachment
As stated

Attachment A

The following are recommendations for applying approved records schedule items to any electronic messages that are federal records and were created or received on government owned mobile devices prior to the date of this memorandum and not already captured for lifecycle records management.

- For any mobile devices turned-in by Capstone or other senior officials, electronic messages created or received thereon will be captured and retained in accordance with Item 010 of General Records Schedule (GRS) 6.1 from the National Archives and Records Administration (NARA).
- For mobile devices turned-in by non-Capstone users, data saved from the mobile devices will be retained for a minimum of six months in accordance with Item 010 of GRS 5.2.
- Coordinate with Component records management staff to identify whether other approved records schedules may be applied to data saved from mobile devices instead of Items 010 of GRS 6.1 and Item 010 of GRS 5.2, consistent with Component policy.
- In the case where records cannot be captured (e.g., loss of password, erasure), Component heads will notify the Archivist of the United States¹. Such notification follows the Component established procedures by the Component Records Officer² for unauthorized disposition of records.
- As with disposition of any records, collaborate with Component legal counsel and records management staff to ensure that there are no active records holds and that the retention requirements of the appropriate records schedules have been met prior to destruction.

¹ 44 U.S.C. § 3106 (2009).

² DoDI 5015.02, DoD Records Management Program (August 17, 2017), section 3, paragraph o.