

Managing Voicemail as Official Records Guideline

Data, Information and Privacy Services Division, Data, Information and Records Services Branch

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Approved by: Sheri Binges, Executive Director, Data, Information and Records Services Branch	Owner: Executive Director, Data, Information and Records Services Branch	
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Contact: SA.InformationManagement@gov.ab.ca	Policy Instrument type: Guideline	

Guideline Statement

This guideline outlines best practices for the management of information related to voicemail received on any Government of Alberta (GoA) phone (VOIP, landline, softphone, or mobile).

Authority

This guideline is issued under the authority of the [Government Organization Act](#) and the [Records Management Regulation](#).

Scope

This guideline applies to all departments defined under section 14 of Schedule 11 of the *Government Organization Act* and agencies, boards, and commissions as defined in schedule 1 of the Freedom of Information and Protection of Privacy Regulation.

Agencies, boards, and commissions that are not contained within schedule 1 of the Freedom of Information and Protection of Privacy Regulation are encouraged to align with this guideline.

Guideline Description

This guideline is designed to assist GoA staff (which includes, but is not limited to, employees, contractors, volunteers, appointees, interns, and students working with a public body) to understand how to manage voicemails identified as official records, regardless of the type of phone or application on which the message is received.

Guideline Specification

GoA staff may receive voicemail on any of several GoA-issued devices or applications, including landline or Voice Over IP (VOIP) phones, softphones, and mobile phones. This guideline applies regardless of the device or application. In the exceptional case that the actual voice recording is an official record, specific guidance is provided below.

1. Voicemails that are not official records are transitory. For guidance on how to determine whether a voicemail is official or transitory, please see the [Identifying Official and Transitory Records Guideline](#).
2. Voicemails identified as official records must be recorded in an official content management system (e.g., SharePoint Online, 1GX, etc.). **NOTE:** Microsoft Outlook is not a content management system.

Documenting a Voicemail

1. For each voicemail that is identified as an official record, create a document that contains an accurate transcript of the voicemail, as well as the following metadata elements:
 - *Creator*: The name of the person who left the voicemail.
 - *Recipient of Message*: Name of recipient.
 - *Date and Time Created*: The date and time the caller left the voicemail.

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- If the voicemail is retrieved from a landline, VOIP, or mobile phone, this is the date and time spoken by the automated attendant.
- If the voicemail is received as an attachment in an email, this is the date and time the email was sent.
- *Subject:* A succinct description of what the voicemail is about (ideally five or fewer words).
- *Description:* A brief, descriptive summary of the voicemail's content and context.
- *Data and Information Security Classification Level:* One of the four security classification levels (Public, Protected A, Protected B, and Protected C) used to classify and protect information assets that are received, created, or retained on behalf of the Alberta government. MS Word will automatically apply the classification Protected A in the document footer—correct this as appropriate for the content. For more information on information security classification, please consult the [Data and Information Security Classification Standard](#).

The Appendix provides an example record. A machine-generated transcript may be used as the starting-point for the transcript, but it must be corrected so that it is an accurate record of the message.

2. Save the document in an official content management system, following the conventions prescribed in the [Electronic Document Naming Conventions](#) guideline. The filename should begin with the word 'Voicemail' followed by the following elements (with all words separated by hyphens, not spaces):
 - the name of the person who left the voicemail, formatted as surname followed by initials (e.g. SmithJ);
 - the date received, formatted as YYYY-MM-DD; and
 - the subject of the voicemail (in five or fewer words).

An example of a filename is **Voicemail-SmithJ-2022-01-17-Voicemail-Policy-Approved.docx**.

Voicemail Recordings as Official Records

When voicemail is received on a VOIP phone, the recipient may also receive the voicemail recording as an email with a .WAV file attachment in MS Outlook. In exceptional circumstances, it may be necessary to treat the actual voicemail recording as an official record, such as when the recording is required as evidence or to document a decision or transaction. In these cases, the email containing the .WAV file must be saved alongside the document in the official content management system. The filename should mirror the filename of the document, except that it will be a .MSG file. An example is **Voicemail-SmithJ-2022-01-17-Voicemail-Policy-Approved.msg**.

To save the email as a .MSG file, open the email in Outlook and then select File | Save As from the menu. Note that depending on the settings in Windows File Explorer, the .MSG file extension may or may not be visible. If it is not, do not manually add it, or else it will be appended to the filename twice. The file may have to be saved to a temporary location (e.g. the Downloads folder) before it can be uploaded into the official content management system.

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For guidance on filing the document or the .MSG file in an official content management system, please consult the appropriate information management specialist, [senior records officer](#), or [IM Portfolio Director](#).

Compliance

Consequences of non-compliance with this standard could result in the loss of information, damage to the GoA's reputation, exposure of Albertans to harm and/or incurrence of unnecessary costs (including the risk of not being able to respond appropriately to a claim in court). Depending on the severity of non-compliance:

- either informal or formal requests and/or follow-ups may be made by Data, Information and Privacy Services Division, Corporate Internal Audit Services, Cybersecurity Services, Office of the Information Privacy Commissioner, Office of the Auditor General and/or Public Service Commission, and
- legislated disciplinary action (i.e., *Public Service Act*) may be taken.

References and Supporting Resources

- [Identifying Official and Transitory Records Guideline](#)
- [IMT Standard A000025 – Data and Information Security Classification](#)
- [IMT Standard A000059 – Metadata – Core Content](#)
- [Electronic Document Naming Conventions](#)
- **Replaces:** Managing Voicemail as Official Records in a Unified Communications Environment guideline

Appendix: Example Voicemail Record

Creator (the full name of the caller): Jane Smith	Recipient of Message: John Doe
Date/Time Created (when caller left message): January 21, 2022, 4:15pm	Subject: Voicemail guideline approved
Description: Jane approved the Managing Voicemail as Official Records guideline, referred to below as the voicemail guidance. Set up meeting for next week to discuss next steps.	
Call Transcript: Hi John, this is Jane. I am calling to let you know that I am approving the voicemail guidance. We will have to discuss next steps, so please set up a meeting with your team for some time next week. Have a good weekend.	