



Records Management Guidance

Generative AI

For guidance on how to use Generative AI (Artificial Intelligence), including what it should or should not be used for, reach out to KCIT and review their [Generative AI Guidelines](#) and [King County IT Policy](#). You might also consider getting feedback from others such as from your human resources staff, agency attorney, or supervisor for information about how your agency should be using Generative AI.

This guidance is about the records management considerations when using Generative AI tools, such as CoPilot Chat. When you use Generative AI, records are created that must be [managed](#):

- If the use relates to county business, they are **public records** per RCW 40.14.010 and **subject to both retention requirements and public disclosure** in accordance with RCW 42.56.
- This includes **both the prompts (input) and the results (output)**.
- The retention requirements associated with Gen AI records are based on the **content and function** (this means that there is **not** a single retention period for all Generative AI records).
- The enterprise storage setting for records created using the CoPilot Chat tool is 30 days and may be discoverable via Microsoft Purview's eDiscovery for a few days after that. This storage setting assumes that most records created using Generative AI will be [transitory records](#).
- This storage setting is **not** the same as legal retention requirements. If Generative AI is not used for a transitory purpose, other retention requirements apply (see partial list below), and additional actions might be needed to meet retention requirements. This could include incorporating Generative AI prompts and/or results into other records, and filing those records to appropriate retention categories in [Content Manager](#). For some options for managing these records, see the bottom of this document.
- Although many Generative AI tools include the word "chat" as part of their name, they are **not communications**; *unless* the results are pasted into an email or are otherwise used as communication with other people.

Some common retention periods that might apply to Generative AI records are listed below. Note that this list is far from exhaustive and is only provided here to illustrate that multiple retention requirements might apply depending on how the Generative AI tool is used. Refer to your [retention schedule](#) for more information about what retention requirements apply to your agency. Note that some categories have archival value, which means that the records cannot be destroyed at the end of their retention period and instead either need to be transferred to or appraised by King County Archives.

For more information, view Washington State Guidance: [Are Generative AI Interactions Public Records?](#) and [How Long Do Generative AI Records Need to be Kept?](#)



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Retention*	Examples	State Disposition Authority Numbers (DANs)
6 years	Development of policies, procedures, mandatory reports, long-range asset plans, budgets, and contracts Process improvement projects, IT Projects , and other routine administrative projects	GS2024-018 GS2024-020 GS2012-028R2 GS2024-002 GS2012-042R1 GS2024-004 GS50-01-11R5
3 years	Development of customer surveys, emergency/disaster plans, job postings, and interview questions Communications with members of the public regarding complaints or requests	GS50-01-09R3 GS50-04B-22R2
2 years	Development of outreach and promotional activities, media releases, staff meeting materials, work plans, and internal reports General communications (especially internal communications)	GS50-06F-07R1 GS50-01-04R3 GS50-01-38R3 GS50-06F-03R2 GS2010-001R4
Until no longer needed for agency business	Development of employee awards, strategic plans, and publications	GS2011-165R1 GS2024-008 GS2010-079 GS50-01-01R1 GS2024-022
Until training is no longer provided	Development of training materials	GS2011-178R2
Until completion of the evaluation	Development of employee performance evaluations	GS50-04B-31R2
Transitory / no retention requirements	Brainstorming and collaborating, Drafting and editing, Records documented as part of more formalized process, Reference materials, and Secondary/duplicate copies	GS2016-002 GS2016-004 GS2016-009R1 GS2016-010 GS50-02-04R2



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*The retentions listed here are simplified. Each record series has a unique “Cutoff Date” which defines when that retention period *begins*.

Process for managing CoPilot Chat records that are not transitory:

If your use of CoPilot Chat is transitory, then this process is **not** needed. But, you should use this process if it is for a purpose that is **not transitory**; or if you have a business need to retain the records for longer than the period of time that they are viewable within CoPilot Chat.

1. Open **CoPilot Chat** and then select **Conversations** in the top left corner to display the list of your CoPilot Chat sessions
2. Select the **session (conversation)** with content you need to export, and it will display in the center of CoPilot
3. For **each prompt or result** that you need to capture, **select the Copy icon** to copy that content



As an alternative, you can select the **Edit in Pages** icon, and then select **Open in Word** icon (top right corner) and then **Open Word**, to open a Word document with the results included. Note though that this process requires more steps than simply copy-and-pasting and does not include the prompts as part of the Word document.

4. **Open another record** to incorporate that content (some options include a Word document, email, PowerPoint slide deck, etc.) and **Paste** (Ctrl + V on your keyboard; or right click and Paste) to embed or include that content in a context it is relevant.
5. **Manage** the record per the appropriate category on the retention schedule. This could include managing active records in an approved shared space (such as SharePoint, Teams, or a shared drive); or [filing inactive records to Content Manager](#).



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