


Best Practices for Email Management

- Delete it.** Can you find the info elsewhere? Delete!
- Delegate it.** Identify the most appropriate person to respond to the email, delegate, and delete it.
- Do it.** If it takes 2 minutes or less, then do it NOW! 30% of all email can be addressed this way.
- Defer it.** If it will take longer than 2 minutes, flag or color code for future reference.
- File it.** Create folders that apply to the functions of your office. Don't clog up your inbox and sent mail!

 **Find more tips:** finance.uw.edu/recmgt/email



Quick Deletes

Toss these types of records when you no longer need them:

- Drafts
- Automatically Generated Notices
- Routine Requests for Information
- Duplicates
- Canned Reports from MyFD
- Notices and Memos
- Published Reference Materials

 **Learn more:** finance.uw.edu/recmgt/gs/transitory




Tools to Keep Your Inbox Clean

Don't let your inbox fill up with **R.O.T.**
Outlook has tools to organize and manage your emails.

- Conversation View
- Quick Steps
- Flags
- Rules and Alerts
- Categories
- Clean Up
- Search
- Retention Policies

R.O.T. = Redundant, Obsolete, and Transitory

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5 Common Records for Principal Investigators

Use the following keywords on the University General Schedule Search to find retention for these records:

- 1 IRB Records
- 2 Drug Development
- 3 Grant Applications
- 4 Lab Records
- 5 Human Subject Research

 **Search here:** finance.uw.edu/recmgt/gs/search

