# 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!

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# 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

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# 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
- Flags
- Categories
- Search
- Quick Steps
- Rules and Alerts
- Clean Up
- 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

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

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

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

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

Records Management Services

http://finance.uw.edu/recmgt/