# Best Practices for Email Management

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

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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 Personnel/Payroll Records Worth Looking Up

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

1. Personnel Folders
2. Timesheets
3. Application Materials
4. Performance Reviews
5. Training

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Find more tips: [finance.uw.edu/recmgt/email](http://finance.uw.edu/recmgt/email)

Learn more: [finance.uw.edu/recmgt/gs/transitory](http://finance.uw.edu/recmgt/gs/transitory)

Find more tips: [finance.uw.edu/recmgt/email](http://finance.uw.edu/recmgt/email)

Search here: [finance.uw.edu/recmgt/gs/personnel](http://finance.uw.edu/recmgt/gs/personnel)