

RECORDS & RETENTION POLICIES

Do I really need to keep this - and for how long?

● Purpose

Manage digital clutter and maintain compliance by knowing when to keep, archive, or securely delete documents.

● CSU Records Retention Schedule

For official guidance, refer to the CSU Records Retention and Disposition Schedule: the systemwide standard for how long to retain and dispose of university records.

● Mini Decision Tree

Is it a final, approved document?

Yes: Check retention table and archive appropriately.

No: Is it a draft or reference?
Yes: Safe to delete after one year.

● Quick Rules of Thumb

- Final policies and minutes: Keep permanently or per schedule.
- Budget and finance docs: Four years, unless otherwise noted.
- Personnel files: Ten years post-separation, unless otherwise noted.
- Drafts and working files: Delete after one year unless in use.

● Common Mistakes

- Keeping multiple drafts or outdated versions in active folders.
- Deleting too early without checking retention policies.
- Confusing 'archive' with 'delete.'

● Tips & Tricks

- Add a 'Review_2026' tag to folders needing future cleanup.
- Shred or permanently delete files containing confidential info.
- Use an 'Archive' folder to separate active vs inactive documents.

This document is for informational purposes and does not replace formal policy.

Created by the Organizational Effectiveness Unit | Cal State Channel Islands | <https://www.csuci/oe/>