

## **Slate Person Records Retention Policy Process**

Approved 4/13/26  
Slate Leadership Team

### **Person Status = Prospect**

- If no email address and no attached materials, delete record
- If no entry term and no attached application and most recent activity date is < today - 1 year, delete record
- If no entry term and most recent activity date is >= today - 1 year, a to-be-drafted email will be sent to the email address pointing them the inquiry form. Record will be deleted upon sending of email to prevent likely duplicate record when inquiry form is submitted.
- If entry term exists and entry term is less than current term minus one year then delete.

### **Person Status = Inquiry or Graduate Inquiry**

- If no entry term and no attached application and most recent activity date is < today - 1 year, delete record
- If entry term exists and entry term is less than current term minus 2 years then delete.

### **Person Status = Applicant or Graduate Applicant or NonCredit Applicant or Elite Auditor Applicant**

- If application term < today – 5 years then delete

### **Person Status = UG Student, GR Student, LW Student**

- Keep 7 years from last enrolled date. The historical student info is handy to have if the student comes back after graduation.

The three records below are used for unmatched materials. These should never be deleted.

- DE Orphan Docs, DE Orphan Docs
- Documents (GRAD Account Do not Delete), Orphan
- Documents, UG Orphan (UG Account Do Not Delete)

All Slate records (excluding materials and material imports) must have:

- Name
- Birthdate
- Email Address
- UG Entry Term or GR Entry Term
- UG Record Type or GR Record Type or Student Type