

USNH Microsoft 365 Data Retention Standards

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1. Purpose

This standards document defines the retention and disposal guidance for digital content stored within Microsoft 365 services, including email, documents, chats, and other collaboration content within the University System of New Hampshire tenant. The goal is to ensure compliance with legal and regulatory requirements, reduce risk, and optimize data storage practices.

2. Scope

These data retention standards are recommendations for data retention and disposal for all University System of New Hampshire groups and users using the Microsoft 365 platform, including but not limited to:

- Exchange Online (Email)
- SharePoint Online/OneDrive
- Microsoft Teams

Note: Your USNH data may have existing applicable policies, including those for Regulated Data, which supersede the standards in this document. Regulated Data include those subject to regulatory compliance, including HIPAA, FERPA, PCI, GLBA, CUI, CJIS, GDPR, and NDAs.

If you believe you are storing Regulated Data, please visit the USNH Regulated Data site and find information on data retention for your type of data: <https://www.usnh.edu/data-services/regulated-data>

3. Roles and Responsibilities

Role	Responsibility
Enterprise Technology & Services	Provide storage usage guidance, cleanup tips, and knowledge base articles to support departments and users.

Data Governance Council	Maintain and review standards document
End Users	Review standards content and utilize guidelines to reduce storage footprint where possible

4. Retention Triggers

Each content type could have a retention trigger, which is the event that starts the countdown clock. This could help with future automation with creation of retention labels:

Trigger Event	Definition
Creation Date	File was first created or uploaded
Project Close	Final deliverable submitted or project archived
Event Date	Day of the event or conference
Contract End Date	Contract expires or is terminated
Fiscal Year End	June 30 or applicable year-end

5. Retention Schedule Overview

Data / Content Type	Examples	Retention Period	Trigger	Notes
Meeting Recordings (Stream/Teams)	Video or audio recordings of meetings	60 days	Last file modification date	Automatically deleted after 60 days unless changed manually
SharePoint/OneDrive				
Research Documentation	Data sets, grant submissions, IRB protocols, lab notes	7 years (or per sponsor)	Close of research / funding period	Contact Research Office for funder-specific rules
Media & Creative Assets	Promotional videos, photos, campaign graphics, marketing files	5 years	Creation date	Consider digital archive for curated collections
Project Records (non-construction)	Schedules, vendor quotes, correspondence, final reports, images, videos	3 years	Project close or event date	Include multimedia assets unless archived separately
Event Records	Agendas, flyers, photos, vendor contracts	3 years	Event conclusion	Retain only if needed for future planning
Meeting Materials	Agendas, minutes, notes	3 years	Meeting date	Executive/official meeting records may need longer
Contracts & Legal Agreements	Vendor contracts, NDAs, MOUs	7–10 years	Contract end date	Store in designated contract folder if possible
Financial Records	POs, receipts, travel reimbursements, budgets	7 years	Fiscal year end	Retain in accordance with audit requirements
Operational/Working Files	Drafts, internal-only planning, temporary spreadsheets	1 year	Creation date	Review annually and delete if no longer needed
Training & Guidance	Orientation materials, guides, FAQs, videos	Until replaced + 1 year	When new materials are published	Keep 1 prior version if relevant

Student/Faculty Support Files	Syllabi, advising docs, onboarding materials	3 years	End of academic year	Exclude FERPA-protected records from general retention
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6. Deletion and Disposition Process

- Automatic Deletion: Some tenant-level settings (e.g., Teams meeting recording expiration) are in place. No broad document/record-based retention or deletion rules are currently enforced in SharePoint, Teams, or OneDrive.
- Disposition Review: Not currently implemented. May be considered in the future for sensitive content types (e.g., HR, Legal) if formal retention policies are applied.
- Litigation Holds: Managed by Legal and Compliance. These override any automatic deletion for content subject to legal or regulatory inquiry.

7. Exceptions and Long-Term Storage

Some departments may have a business, legal, or regulatory requirement to retain data permanently or for extended periods beyond general guidelines.

- Permanent Retention: If content cannot be deleted due to long-term or indefinite retention needs, departments should not rely on SharePoint, OneDrive, or Teams as permanent archives.
- To discuss long-term storage solutions, please contact the Research Computing Center (RCC Support) team through this request form:
<https://td.usnh.edu/TDClient/60/Portal/Requests/ServiceDet?ID=533>

8. User Guidance and Training

All users will have access to:

- Knowledge base articles and documentation explaining data retention expectations, cleanup tips, and responsible storage practices.
- Notifications and updates when major changes to data retention guidance or standards are introduced.
- Enterprise Technology & Services offers consultative support and office hours for users or departments with questions about retention, cleanup, or storage management.

9. Retention Standards Documentation Review Cycle

This standards document will be reviewed annually by the Data Governance Council, or sooner if:

- Legal, regulatory, or infrastructure requirements change
- Microsoft 365 features change
- Audit findings indicate gaps