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Record retention policy template

Follow the template below to create a record retention policy for your business:

Purpose

[In two or three sentences, state why this policy is essential and how it benefits your business.]

Scope

[List the departments or areas of the business that are governed by this business.]

Policy

[Describe the type of documents this policy governs]

Retention period

[Dates or specific years employees should retain each type of document.]

Disposal

[Outline where all the documents should be placed or how to dispose of them after the retention period.]

Protection levels

[List types of documents with specific protection protocols. This can include password protection or access by only certain members of the business.]

Approvers

[List names of people to approve any documents or records that employees plan to keep longer or shorter than their designated time periods.]

Appendix

[List definitions of terminology.]

Example of a successful record retention policy

Use this example as a guide while writing your business's record retention policy:

Purpose

The purpose of this record retention policy is to outline documents retained by our human resources (HR) department. By listing which information to keep and how long documents must be retained, we are ensuring the accuracy and security of important records. Employees must uphold this policy and follow the guidelines detailed below.

Scope

This policy covers any human resources documents created by our human resources department or submitted by employees. This can include new hire paperwork, onboarding documents and company productivity information.

Employees who access, contribute or manage any documents related to the records mentioned above must follow these guidelines. This policy covers the following types of electronic and physical records:

- Email conversations
- Meeting minutes
- Spreadsheets
- Documents
- Presentations
- Any scanned documents submitted by employees or external sources

Policy

New hire paperwork

Description

Any legal or business documentation submitted by employees during their first three days of employment.

Retention period

- Two years after employee termination

Disposal

- Stored electronically in locked and shared human resources electronic folder until termination
- Move to company archives two years after termination

Protection levels

HR employees must store new hire document archives in an electronic file with a password only shared with HR staff members and the executive team.

Approvers

Any exceptions to the regulations above must be approved by the CEO or human resources director.

Appendix: Definitions

Record: Any company documents that are stored for future reference.

Record retention: The method for securing and overseeing records.

Retention period: The length of time a record is to be kept in the company's files and storage.

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