Community Pharmacy Lincolnshire Document Retention and Storage Policy

Purpose

The purpose of this record retention policy is to outline documents retained by Community Pharmacy Lincolnshire. 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 documents created by CPL or submitted by employees. This can include accounts, minutes and agendas for meetings, human resources paperwork and company productivity information. Employees who access, contribute or manage any documents related to the records mentioned above must follow these guidelines. Any exceptions to the regulations in this policy must be approved by the Executive

Protection levels

Prior to 2021 records were stored in hard copy, post 2021 they are now stored electronically. Electronic records must be stored in the relevant folders on the CPL shared drive. Hard copy papers must be stored securely as agreed by the Executive.

Paperwork Type	Retention Period and Disposal
Historic HR Disciplinary and Other Hard Copy HR Paperwork	Ten years from date of production.
Current Electronic HR Records	Two years after employee termination
Hard Copy Meeting papers & minutes (relevant pre 2021)	Six Years
Electronic Meeting papers & minutes (from 2021)	Six Years
Final Accounts	Six Years
Accounts transactions held electronically (from 2021/22)	Six Years
Hard Copy Accounts transactions (prior to 2021/22)	Six Years
Historic hard copy Confidentiality Agreements	Six years from date of completion
Historic hard copy Declarations of Interest	Six years from date of completion
Electronically stored Confidentiality Agreements	Six years from date of completion
Electronically stored Declarations of Interest	Six years from date of completion
Hard copy miscellaneous paperwork (pre 2021)	Six Years
Electronically stored miscellaneous documentation	Six years max with regular review