
	<h1 style="text-align: center;">Records Retention Schedule – Human Resources</h1> <h2 style="text-align: center;">Records Manual</h2>		Document Number: RM-SS-05.01
	Department: Human Resources	Effective Date: January 22, 2022	Revision No 3

Record Code	Record Name	Type	Records Definition	Retention Schedule		Disposal Method
				Active	Inactive	
HRD 1.0	RECORD MANAGEMENT					
HRD 1.1	201 FILE	Hard	Repository of all personnel records for an employee containing all personnel paperwork created for or on behalf of an individual such as school/government/medical records, awards and reprimands	Until Employee Exist	1 year after resignation	Archived
HRD 1.2	MINUTES OF THE MEETINGS	Soft	Contains all records minutes of the meeting	1 year	1 year	Delete
HRD 1.3	SERVICE PROVIDER	Hard	Contains all records of Service Provider	1 year	Until Service Provider Exist	Shred
HRD 2.0	TRAINING AND DEVELOPMENT					
HRD 2.1	TRAINING MANUAL	Soft	Contains existing and probable activities relating to employees growth and development	Until Superseded	-	Delete
HRD 2.2	TRAINING NEED ANALYSIS	Soft	Contains existing and probable activities relating to employees' training need analysis	2 years	2 years	Delete
HRD 2.3	TRAINING PLAN	Soft	Contains all schedule of trainings to achieve the full potential of employees and to enhance their skill and knowledge	5 years	2 years	Delete
HRD 2.4	TRAINING FEEDBACKS	Soft	Contains existing and probable activities relating to employees' training feedbacks	2 years	2 years	Delete
HRD 2.5	TRAINING ATTENDANCE	Soft	Contains existing and probable activities relating to employees training attendance	2 years	1 year	Shred
HRD 2.6	TRAINING EVALUATION EFFECTIVENESS	Soft	Contains all records of learning (exams), comments and suggestion of specific trainings	2 years	1 year	Shred
HRD 2.7	TRAINING EVALUATION EFFECTIVENESS	Soft	Contains all records of job induction checklist	2 years	1 year	Shred
HRD 3.0	EMPLOYEE RELATION/ENGAGEMENT					
HRD 3.1	HR CALENDAR OF ACTIVITIES	Soft	Contains all records about HR Calendar	2 years	1 year	Delete
HRD 4.0	COMPENSATION AND BENEFITS					
HRD 4.1	SALARY AND WAGES	Soft	Contains all records related to employees compensation and benefits	1 year	5 years	Delete
HRD 4.2	HMO	Soft	Contains all records related to HMO	Until Provider Exist	2 years	Delete
HRD 4.3	INSURANCE	Soft	Contains all records about accident insurance	Until Provider Exist	2 years	Delete

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HRD 5.0	PERFORMANCE MANAGEMENT SYSTEM					
HRD 5.1	PERFORMANCE EVALUATION	Soft	Contains all records of performance evaluation of new hires and regular employees	1 year	1 year	Shred
HRD 5.1.1	NEW HIRE 3 RD MONTH	Soft	Contains all records of performance evaluation of probationary in their 3rd month	1 year	1 year	Shred
HRD 5.1.2	NEW HIRE 5 TH MONTH	Soft	Contains all records of performance evaluation of probationary in their 5th month	1 year	1 year	Shred
HRD 5.1.3	REGULAR MID YEAR	Soft	Contains all records of performance evaluation of regular employees for	1 year	1 year	Shred
HRD 5.1.4	REGULAR YEAR END	Soft	Contains all records of performance evaluation of new hires and regular employees	1 year	1 year	Shred
HRD 6.0	TIMEKEEPING	Soft	Contains all records of employee's daily time entries, leave and overtime in Salarium	1 year	2 years	Delete
HRD 7.0	PAYROLL	Soft	Contains records of employee's wages and benefits in Salarium	1 year	2 years	Archived
HRD 8.0	RECRUITMENT AND SELECTION					
HRD 8.1	RESUMES	Soft/Hard	Contains all application form	3 months	1 month	Shred
HRD 8.2	MANPOWER REQUEST FORM (MRF)	Soft/Hard	Contains all records of Manpower requests	1 year	1 year	Archived/ Shred
HRD 8.3	SALARY OFFER	Soft/Hard	Contains all records of salary offer	1 year	3 years	Archived/ Shred
HRD 9.0	PEOPLE MOVEMENT					
HRD 9.1	CHANGE OF STATUS	Soft/Hard	Contains all records for change of status	1 year	3 years	Archived
HRD 9.2	RESIGNATION/ TERMINATION	Soft/Hard	Contains all records for resignation/termination	Until Employee Exist	1 year after resignation	Archived
HRD 10.0	ORGANIZATIONAL DEVELOPMENT					
HRD 10.1	ORGANIZATIONAL CHART	Soft	Contains all records for organizational chart	1 year	2 years	Delete
HRD 11.0	KEY PERFORMANCE INDICATOR	Soft	Contains all records for KPI	1 year	3 years	Delete
HRD 12.0	LABOR RELATED					
HRD 12.1	DEPARTMENT OF LABOR AND EMPLOYMENT		Contains all statutory records from DOLE	2 years	3 years	Shred
HRD 12.1.1	REGISTRATIONS FOR CONTRACTS AND SUB-CONTRACTORS UNDER DO-174	Soft/Hard	Contains all statutory records from DOLE	2 years	3 years	Shred
HRD 12.1.2	ESTABLISHMENT TERMINATION REPORT	Soft/Hard	Contains all statutory records from DOLE	2 years	3 years	Shred
HRD 12.1.3	DOLE AUDIT	Soft/Hard	Contains all statutory records from DOLE	3 years	3 years	Shred

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HRD 12.2	SOCIAL SECURITY SYSTEM (SSS)					
HRD 12.2.1	EMPLOYMENT REPORT	Soft	Contains all records of employees from SSS	1 year	3 years	Shred
HRD 12.2.2	COTRIBUTION PAYMENTS	Soft/Hard	Contains all monthly reports and payments for contribution from SSS	1 year	10 years	Shred
HRD 12.2.3	LOAN PAYMENTS	Soft/Hard	Contains all monthly reports and payments for loan from SSS	1 year	10 years	Shred
HRD 12.2.4	SICKNESS NOTIFICATION/REIMBURSEMENT	Soft	Contains all employee sickness records from SSS	1 year	10 years	Shred
HRD 12.2.5	MATERNITY NOTIFICATION/REIMBURSEMENT	Soft	Contains all employee maternity records from SSS	1 year	10 years	Shred
HRD 12.3	PHILHEALTH					
HRD 12.3.1	REPORT OF EMPLOYEE MEMBERS	Soft	Contains all records of employees from Philhealth	1 year	10 years	Shred
HRD 12.3.2	CONTRIBUTION PAYMENTS	Soft	Contains all monthly reports and payments for contribution from philhealth	1 year	10 years	Shred
HRD 12.4	PAG-IBIG/HDMF					
HRD 12.4.1	CONTRIBUTION PAYMENTS	Soft	Contains all monthly reports and payments for contribution from Pag-ibig	1 year	10 years	Shred
HRD 12.4.2	LOAN PAYMENTS	Soft	Contains all monthly reports and payments for contribution from Pag-ibig	1 year	10 years	Shred
HRD 12.5	BUREAU OF INTERNAL REVENUE					
HRD 12.5.1	BIR FORM 2316	Soft/Hard	Contains all records from income tax return from BIR	1 year	2 years	Shred
HRD 13.0	EMPLOYEE SATISFACTION SURVEY	Soft	Contains all records for employee's satisfaction	1 year	3 years	Archived

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