OWNER CHECKLIST · CALL RECORDING · 2026

Do You Secure Your Call Recordings?

A ten minute audit scored out of 24, the five fixes that matter most, a retention starting table and a one-page policy.

> Score each question **2** for yes, **1** for partly or not sure, **0** for no. Open your phone system portal in another tab and be honest: if you cannot check it, you cannot rely on it.

The ten-minute audit

- [ ] Everyone signs in with their own name, no shared account
- [ ] Only people who need recordings can open them
- [ ] Nobody who has left can still sign in
- [ ] Removing access is a written last-day step
- [ ] Recordings are played in the system, not emailed
- [ ] You know every other place recordings are copied to
- [ ] Retention period decided and written down
- [ ] Older recordings are actually deleted
- [ ] Card details are never read out on recorded calls
- [ ] You know which country recordings are stored in
- [ ] Provider has explained protection and access in writing
- [ ] Team knows the rules and callers are told

Your score out of 24

Score	Meaning	Do this
0 to 11	Exposed	Five fixes this week
12 to 19	Patchy	Fix the 0s and 1s this month
20 to 24	Under control	Repeat yearly and after changes

The five fixes that move the score most

1. **Own logins:** retire shared accounts, limit who can listen.
2. **Lock out leavers:** remove old users now, and on every last day.
3. **Retention:** choose a period, write it down, delete on schedule.
4. **No emailed copies:** play recordings in the system.
5. **Card details off tape:** send a payment link instead.

Retention starting points (general guidance only)

Business type	Starting point	Check first
Trades, retail, hospitality	3 to 12 months	Complaint timeframes
Sales and support coaching	30 to 90 days	Contract evidence
Tax and BAS agents	5+ years if it is the record	TPB Code
Financial advisers	Generally 7 years if advice record	ASIC requirements
Health, NDIS	As record rules require	Health records law, NDIS Commission

Your one-page policy covers

- Why you record and who can listen
- Where recordings live and how they are shared
- Card payments, retention and leavers
- Customer requests and what to do if something goes wrong

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