

COUNTY OF AMADOR - RECORDS MANAGEMENT
RECORDS RETENTION SCHEDULE (RM3)

Department Assessor	Schedule Number (1) 03	Date 12/02/09
Division	Page 1 of 5 Pages	
Address 810 Court Street Jackson, CA 95642	Records Management Approval Number (2) 1220-2009-03 BOS Approved: 12/22/09	

ITEM NUMBER	TITLE AND DESCRIPTION OF RECORDS	M e d i a	V i t a l	A r c h i v e	RETENTION			REMARKS
					OFFICE	RC	TOTAL	
(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
	Note: Destruction of duplicate copies is authorized pursuant to Government Code Section 26201.							CARR" = Countywide Administrative Records Retention Schedule
	Pursuant to Government Code Section 26202, some records more than two years old may be destroyed.							CY = Current Year
	Retention periods shall be extended when necessary to comply with audits, civil and criminal action, and any other matter requiring the continued retention of the records.							GC = Government Code
	County Archives shall provide access to archived County records in accordance with applicable Federal and State statutes and regulations and County ordinances and policies.							R&T Code = Revenue and Taxation Code
	County records, both originals and copies, are COUNTY PROPERTY and are required to be kept in the appropriate offices and files. They may not be removed therefrom except for inter-office work or otherwise as necessary in the ordinary course of conducting County business. Employees may not take County records home or to some location other than their offices except as required in the ordinary course of conducting County business.							
	Based on current recycling policies, records not deemed confidential by the Agency possessing the records will be recycled unless otherwise noted.							
	This retention schedule supersedes all previously approved retention schedules.							
	All County departments/divisions shall comply with the current Countywide Administrative Records Retention Schedule (CARRS) as well as their department/division specific retention schedule. In the case of a conflict, the longer retention shall be adhered to.							

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Department	Assessor	Schedule Number (1)	03	Date	12/02/09
Division		Page	2	of	5
Address	810 Court Street Jackson, CA 95642	Records Management Approval Number (2)	1220-2009-03 BOS Approved: 12/22/09		

ITEM NUMBER (3)	TITLE AND DESCRIPTION OF RECORDS (4)	M e d i a (5)	V i t a l (6)	A r c h i v e (7)	RETENTION			REMARKS (11)
					OFFICE (8)	RC (9)	TOTAL (10)	
01	APPRAISAL RECORDS***** May include: property detail; valuations, appraisal notes	P C	X		CY + 2 years	4 years	CY + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.
02	ASSESSOR PARCEL MAPS***** Includes: Active and Historical	C P	X		Permanent		Permanent	All assessor maps retained permanently in conjunction with and for clarification of official records and legal descriptions.
03	ASSESSMENT APPEALS***** May include: Application for Changed Assessment form, Correspondence, ATF, Board Minutes	P			CY + 6 years		CY + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Originals retained by the Clerk of the Board of Supervisors. Confidential Records. Destroy by shredding.
04	ASSESSMENT ROLLS***** May include: Hard copies - 1975-1999	C	X		5 years	Permanent	Permanent	Assessment rolls retained permanently for valuation and taxation purposes.
05	CHANGE IN OWNERSHIP FORMS***** May include: State forms-Preliminary Change of Ownership Report (BOE502-A) and Change of Ownership Statement (BOE502-AH)	P			CY + 2 years	8 years	CY + 10 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Department preference due to reference purposes. Confidential Records. Destroy by shredding.

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ITEM NUMBER (3)	TITLE AND DESCRIPTION OF RECORDS (4)	M e d i a (5)	V i t a l (6)	A r c h i v e (7)	RETENTION			REMARKS (11)
					OFFICE (8)	RC (9)	TOTAL (10)	
06	EXCLUSION CLAIM FORMS***** May include: Claims for miscellaneous propositions, Forms 58-AH, 58-G and 60-AH, 60-NR, 62, 63, 63-A, 64, 65-PT, copies of trusts	P			CY + 2 years	4 years	CY + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.
07	EXEMPTION CLAIMS***** May include: homeowners, veterans, disabled veterans, welfare, religious, church	P			Active + 6 years		Active + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.
08	MAILING ADDRESS CHANGES*****	P			2 years		2 years	Reference: GC 26202; no specific retention authority discovered. Department preference for clarification purposes.
09	ROLL CORRECTIONS***** May include: 601 Roll and Supplemental Assessment Roll corrections and documentation, and Escaped Assessments	P			CY+ 2 years	4 years	CY + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.
10	ANNUAL VALUE REPORT & NOTICES***** May include: Change in valuation reports for normal assessed & agricultural properties & notices for properties under Prop 8 valuation.	P			CY + 2 years	4 years	CY + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.

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					OFFICE (8)	RC (9)	TOTAL (10)	
11	DAILY VALUE NOTICES*****	P			CY + 2 years		CY + 2 years	Reference: GC 26202; no specific retention authority discovered.
12	APPRAISAL WORKSHEETS*****	P			CY + 2 years		CY + 2 years	Reference: GC 26202; no specific retention authority discovered.
13	BOAT REPORTS*****	P			Until inactive + 6 years		Until inactive + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.
14	UNSECURED FILES***** May include: Business & Personal Property; Mining Claims; Possessory Interest Assessments; Aircraft; Business & Personal Property Audits	P			Until inactive + 2 years	4 years	Until inactive + 6 years	Pursuant to R&T Code 465, records may be destroyed 6 years following lien date. Confidential Records. Destroy by shredding.
15	ASSESSMENT ROLLS (CD)***** May include: CD's - FY 2000-forward	M	X		10 years	Permanent	Permanent	Assessment rolls retained permanently for valuation and taxation purposes.

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INSTRUCTIONS

- 1) **Schedule Number.** Each department should establish its own system of numbering schedules. Enter this number on each page.
- 2) **Records Management Approval Number.** Please leave this space blank. Records Management will assign a number and return a copy of the Records Retention Schedule (RM3) upon approval by the Board of Supervisors.
- 3) **Item Number.** Item numbers must be sequential and begin with number 1 on the first page.
- 4) **Title and Description of Records.** Exact title of the records series must be entered here. DO NOT DELETE records for a discontinued series until all such records have been destroyed or ownership transferred to another department. A description must be included if the title is not sufficiently descriptive to explain the contents to someone unfamiliar with the records. An acronym must be spelled out in full the first time it is identified on the schedule.
- 5) **Media.** Enter the appropriate code for each type of record: P-paper (except computer printout); C-computer printout; M-magnetic or electronic (computer tapes or discs, or word processing discs); D-diazo (working copy) microfilm or microfiche; S-silver (master copy) microfilm or microfiche; F-floppy disk; O-optical disk. A listing for records received in one media and converted to another media, must include a retention period for each media.
- 6) **Vital.** Enter an "X" if this listing is vital (essential) to department operations. An "X" indicates that some special method of protection from loss is required. The special method of protection must be noted under REMARKS.
- 7) **Archives.** Please leave this space blank. The Archivist will mark this space with an "X", if applicable.
- 8) **Office Retention.** Enter the length of time records will be retained in the office. For records such as active tax accounts, enter the word "Active" in column 8. Then enter the length of time (if any) the records will be held in office space when the records are no longer active. Column 11 needs to state the event, which terminates the active life of the records.
- 9) **Records Center Retention.** Enter the length of time records will be retained in the Records Center. Records should be retained in the Records Center when they are not being referenced enough to warrant their storage in the office but must still be retained for a period of time or permanently. Permanent retention must be required by law. If law does not dictate permanent retention, records series shall be re-evaluated every five (5) years.
- 10) **Total Retention.** Enter the total number of years from Columns 8 and 9.
- 11) **Remarks.** Enter any information, which will explain or clarify treatment of the records. Other helpful information includes, but is not limited to:
 - a. Events that trigger purging, updating or transferring records, or that terminates active status.
 - b. Cross references to previous retention schedules.
 - c. Type of destruction required when the records have reached the end of the retention period.
 - d. Authority that exempts disclosure of information to the public.