

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

Department	Treasurer/Tax Collector	Schedule Number (1)	01	Date	10/25/05
Division		Page	1 of 4	Pages	
Address	500 Argonaut Lane Jackson, CA 95642	Records Management Approval Number (2)	1210-2005-01 BOS Resolution: 05-463		

ITEM NUMBER	TITLE AND DESCRIPTION OF RECORDS	Media	Vital	Archive	RETENTION			REMARKS
					OFFICE	RC	TOTAL	
(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
	<p>Note:</p> <p>Destruction of duplicate copies is authorized pursuant to Government Code Section 26201.</p> <p>Pursuant to Government Code Section 26202, some records more than two years old may be destroyed.</p> <p>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.</p> <p>County Archives shall provide access to archived County records in accordance with applicable Federal and State statutes and regulations and County ordinances and policies.</p> <p>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.</p> <p>Based on current recycling policies, records not deemed confidential by the Agency possessing the records will be recycled unless otherwise noted.</p>							<p>"R&T" = Revenue and Taxation Code Section</p> <p>"GC" = Government Code Section</p>

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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)	
01	BONDS***** May include: Records and Reports pertaining to Improvement District Bonds.	C P			30+ years	Permanent	Permanent	Pursuant to GC Sections 26907.1 and 53921, records are to be retained for 5 years after final payment. Department preference to retain records permanently due to some bonds are not marked as "Paid."
02	CORTAC***** May include: Records & Reports pertaining to CORTAC payments.	C P			2 years	3 years	5 years	Pursuant to GC Section 26202., records are to be retained for 2 years. Department preference to retain for 5 years due to research purposes.
03	REDEMPTION***** May include: Records & Reports pertaining to the prior Secured (Redemption) Tax Roll and Abstracts.	C P		X	5 years	7 years	12 years	Pursuant to R&T Code Sections 4107 and 4377, records are to be retained for 12 years. Forward to Archives at end of retention period.
04	SECURED ***** May include: Tax Records & Reports pertaining to the current Secured Tax Roll.	C P		X	3 years	9 years	12 years	Pursuant to R&T Code 4377 and GC 26205.1, records are to be retained for 12 years. Forward to Archives at end of retention period.
05	SECURED ***** May include: Tax Records & Reports pertaining to the current Secured Tax Roll.	M		X	12 years		12 years	Pursuant to R&T Code 4377 and GC 26205.1, records are to be retained for 12 years. Forward to Archives at end of retention period.

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					OFFICE (8)	RC (9)	TOTAL (10)	
06	SUPPLEMENTAL***** May include: Records & Reports pertaining to the current and prior Supplemental Tax Rolls.	C		X	3 years	9 years	12 years	Pursuant to R&T Code Section 4377 and GC Section 26205.1, records are to be retained for 12 years. Forward to Archives at end of retention period.
07	TAX ROLLS (prior to FY 2000/2001)***** May include: Original Secured, Supplemental and Unsecured Tax Rolls.	C				Permanent	Permanent	Pursuant to R&T Code Section 4377, records are to be retained for 12 years. Department preference to retain records permanently due to historical and research purposes.
08	TAX ROLLS ***** May include: Original Secured, Supplemental and Unsecured Tax Rolls.	M			Permanent		Permanent	Pursuant to R&T Code Section 4377, records are to be retained for 12 years. Department preference to retain records permanently due to historical and research purposes. Records maintained on MegaByte software system as of FY 2000/2001.
09	TRANSIENT/OTHER TAX***** May include: Records & Reports pertaining to Transient Occupancy Tax, Tax Clearance Certificates & Bulk Transfers	C		X	5 years	2 years	7 years	Pursuant to R&T Code Section 7283.51 and GC Section 26202, records are to be retained for 2-4 years. Department preference to retain records for 7 years due to research, audit, and collection purposes. Forward to Archives at end of retention period.
10	TREASURY***** May include: Records & Reports pertaining to Treasury operations.	C		X	2 years	5 years	7 years	Pursuant to GC Sections 26202 & 27001, records to be retained for 2-5 years. Department preference to retain records for 7 years due to research, audit, and historical purposes. Forward to Archives at end of retention period.

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11	UNSECURED***** May include: Records & Reports pertaining to the current Unsecured Tax Roll and prior Unsecured Tax Rolls.	C		X	3 years	2 years	5 years	Pursuant to R&T Code Section 2928, records are to be retained for 5 years. Forward to Archives at end of retention period.