

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

Department	Administrative Agency	Schedule Number (1)	01	Date	7/21/10
Division	Board of Supervisors	Page	1 of 3	Pages	
Address	500 Argonaut Lane Jackson, CA 95642	Records Management Approval Number (2)	1100-2010-01 BOS Approved: 08/31/10		

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. Pursuant to Government Code Section 26202, some records more than two years old may be destroyed. 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. County Archives shall provide access to archived County records in accordance with applicable Federal and State statutes and regulations and County ordinances and policies. 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.							GC = Government Code

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ITEM NUMBER (3)	TITLE AND DESCRIPTION OF RECORDS (4)	Media (5)	Volume (6)	Archive (7)	RETENTION			REMARKS (11)
					OFFICE (8)	RC (9)	TOTAL (10)	
01	APPLICATIONS FOR CHANGED ASSESSMENT***** May include: application, correspondence, maps, appraisals, findings of fact, statements.	P			5 years following final action		5 years following final action	Pursuant to GC 25105.5. Confidential Records. Destroy by shredding. Board of Supervisors convenes as the Board of Equalization.
02	AGENDA ACTION ITEMS (POST 2008)***** May include: Processed Agenda Transmittal Forms (ATF) and support documentation for matters placed before the Board for action.	P			CY + 1 year	4 years	CY + 5 years	Reference: GC 26202; no specific retention authority discovered. Electronic version is retained permanently.
03	AGENDA ACTION ITEMS (POST 2008)***** May include: Processed Agenda Transmittal Forms (ATF) and support documentation for matters placed before the Board for action, including open session minutes and Public Hearings,.	M			Permanent		Permanent	No specific retention authority discovered. Records reside on the server.
04	AGENDA ACTION ITEMS (YEARS 2004 - 2008)***** May include: Processed Agenda Transmittal Forms (ATF) and support documentation for matters placed before the Board for action, including open session minutes and Public Hearings.	P				Permanent	Permanent	Originals shall be retained permanently unless imaged. Once imaged, retain in accordance with Item Number 2.

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ITEM NUMBER (3)	TITLE AND DESCRIPTION OF RECORDS (4)	M e d i a (5)	V i d e o (6)	A r c h i v e (7)	RETENTION			REMARKS (11)
					OFFICE (8)	RC (9)	TOTAL (10)	
05	GENERAL CORRESPONDENCE (PRIOR TO 2005)***** May include: Processed Agenda Transmittal Forms (ATF) and support documentation for matters placed before the Board for action, including open session minutes and Public Hearings, and administrative/operational office files	P				Permanent	Permanent	Prior to 2004 all administrative/operational office files and action items were filed together under the record series General Correspondence.
06	GENERAL CORRESPONDENCE (POST 2004)***** May include: Administrative/operational office files	P		X	CY + 1 year	4 years	CY + 5 years	Reference: GC 26202; no specific retention authority discovered. Forward to Archives at end of retention period.
07	AUDIO/VIDEO RECORDINGS***** May include: audio/video recordings of meetings and hearings of the Board of Supervisors/Board of Equalization	M			CY + 10 years following minute certification		CY + 10 years following minute certification	Reference: GC 26202; no specific retention authority discovered. Reference: 64 CAL. OP. ATT'Y GEN. 317 (4/17/1981) To facilitate determination of legislative intent.
08	CLOSED SESSION***** May include: Processed Agenda Transmittal Forms (ATF) and support documentation for matters placed before the Board for action during closed session	P				Permanent	Permanent	

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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.