

SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA



ITEM  
3.6  
(ID # 10829)

MEETING DATE:

Tuesday, September 17, 2019

FROM : ASSESSOR-COUNTY-CLERK-RECORDER:

SUBJECT: ASSESSOR-COUNTY CLERK-RECORDER / RMAP: Approval of the revised  
Departmental Records Retention Schedules, All Districts. [\$0]

RECOMMENDED MOTION: That the Board of Supervisors:

1. Approve the attached revised General Records Retention Schedule for the County of Riverside
2. Approve the attached revised Departmental Records Retention Schedule for the County Assessor-County Clerk-Recorder – Assessor Department

ACTION: 4/5 Vote Required

*Kan Wang*  
Kan Wang, Assistant Assessor-County-Clerk Recorder

8/29/2019

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MINUTES OF THE BOARD OF SUPERVISORS

On motion of Supervisor Hewitt, seconded by Supervisor Perez and duly carried by unanimous vote, IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Jeffries, Spiegel, Washington, Perez and Hewitt  
Nays: None  
Absent: None  
Date: September 17, 2019  
xc: ACR

Kecia R. Harper  
Clerk of the Board,  
By: *Kecia R. Harper*  
Deputy

**SUBMITTAL TO THE BOARD OF SUPERVISORS COUNTY OF RIVERSIDE,  
STATE OF CALIFORNIA**

<b>FINANCIAL DATA</b>	<b>Current Fiscal Year:</b>	<b>Next Fiscal Year:</b>	<b>Total Cost:</b>	<b>Ongoing Cost</b>
<b>COST</b>	\$ NA	\$ NA	\$ NA	\$ NA
<b>NET COUNTY COST</b>	\$ NA	\$ NA	\$ NA	\$ NA
<b>SOURCE OF FUNDS: NA</b>			<b>Budget Adjustment: No</b>	
			<b>For Fiscal Year: 2019/2020</b>	

**C.E.O. RECOMMENDATION:** Approve

**BACKGROUND:**

**Summary**

In accordance with the provisions of Board Policy A-43, the Records Management and Archives Program (RMAP) worked with appropriate departments to review the Records Retention Schedule attached. Approval will authorize the disposal of certain records following mandatory retention requirements, thereby enabling the County to reduce the cost of storage for obsolete materials while ensuring that administrative, fiscal, legal and other recordkeeping responsibilities are met. Prior agenda references are noted on the appropriate cover page. Per Government Code 26202, this item requires a 4/5 vote.

**Impact on Residents and Businesses**

The citizens of Riverside County benefit from the efficiencies gained through the application of generally accepted recordkeeping principles.

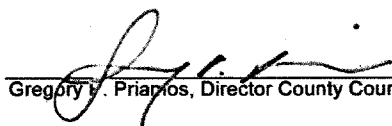
**ATTACHMENTS: General Records Retention Schedule**

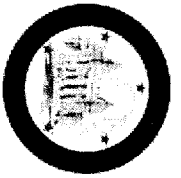
Supersedes GRRS adopted December 05, 2017 as agenda item #3.7

**Assessor-County Clerk-Recorder – Assessor Department**

Supersedes DRRS adopted October 20, 2015 as agenda item #3.6

  
Stephanie Perez, Principal Management Analyst 9/9/2019

  
Gregory V. Priaplos, Director County Counsel 9/4/2019



**County of Riverside, California  
Departmental Records Retention Schedule  
(DRRS\_ACR-A\_2019\_Rev04)**

Enacted pursuant to Board of Supervisors, County of Riverside Resolution No. 2016-126, "Pertaining to the Management, Retention, Destruction or Disposition of County Records," and Board of Supervisors, County of Riverside Policy A-43: "County Records Management and Archives Policy."

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Inquiries or comments regarding this schedule should be directed to:

County of Riverside  
Records Management and Archives Program (RMAP)  
2724 Gateway Drive  
Riverside, CA 92507  
951-486-7067  
(County Mail Stop 2625)

**Introduction**

This Departmental Records Retention Schedule (DRRS) for the Assessor-County Clerk-Recorder, Assessor Department (ACR-A) is adopted as per the recommendations of Board Policy A-43 and supersedes the DRRS adopted October 20, 2015 as agenda item # 3.6.

This schedule is written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series. This retention schedule indicates the length of time that listed records, regardless of media or format, must be retained by the department before disposition may be implemented. These retention requirements are recommended in order to reduce the costs for the storage and maintenance of records while ensuring that administrative, fiscal, legal and other recordkeeping responsibilities are met.

Records, including copies held for convenience or reference, must be disposed of as directed herein at the close of the official retention period. A full justification for any request to extend the retention period for a particular group of records must be submitted in writing to the Records Management and Archives Program (RMAP) as stated by Board Policy A-43, Section D.5.

If a federal or state statute or regulation specifies a longer retention period for any records series received, created, or maintained by the department, the statute or regulation override this schedule and the department must amend its records retention schedule as soon as practicable. In addition, a record may not be destroyed if notice of litigation, audit, public records request, etc. is received prior to the expiration of the retention period. For records held for audit purposes, the Auditor Controller's Office, or appropriate auditing authority, will notify the department once the audit is complete. In the event a lawful claim or a lawsuit is made against the county of Riverside, the department will suspend destruction of the subject records until all issues of the matter are resolved. Further, if the department is notified by County Counsel or Human Resources to put documents on hold due to a claim or other legal proceeding, the department will suspend any records destruction of the identified documents. (Board Policy A-43 § D.9)

The department will maintain the requested records until the close of litigation or proceedings plus an additional ten (10) years. The department is responsible for ascertaining the correct date of closure in order to establish this ten (10) year retention period. Furthermore, the department is responsible for establishing appropriate procedures to ensure that records are retained for the period of time mandated and that the records remain accessible as required.

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## **Explanation of Fields**

**Record Series Codes:** The Record Series Code is assigned by RMAP. The code is alphanumeric and uniquely identifies the Record Series Title regardless of the schedule it occupies enabling the Record Series to be tracked within the master index system.

**Record Series Title:** The Record Series Title identifies a group of similar records generally produced or utilized for similar business needs allowing them to be evaluated as a group for retention scheduling purposes.

**Record Series Description:** A description of the Record Series Title that includes examples, not an exhaustive list, of the record types found within the group.

**Official Records:** The agency or department responsible for the county's official record.

**Official Record Retention:** The length of time that the official record must be kept based upon the legal minimum requirement as well as any operational or business need. All other copies must be disposed of at the end of the retention period. For example, departmental copies held for convenience or reference must be destroyed at the close of the retention period or when no longer needed to support normal business operations, whichever is earlier.

**Citation / Rationale:** The legal citation or operational/business reason for retaining the official record for the period specified.

**Final Disposition:** The recommended final status or arrangement for the official record, usually disposed of by confidential shredding or transfer to the County of Riverside Archives as determined through best practice.

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## **Explanation of Codes**

**Best Practice** = Best Practice determined through business and government agency benchmarks.

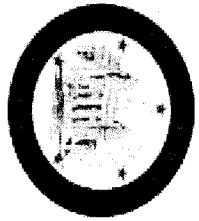
**CCR** = California Code of Regulations

**FY** = Fiscal year end

**GOV** = California Government Code

**RTC** = California Revenue & Tax Code

**P** = Permanent



# COUNTY OF RIVERSIDE RECORDS RETENTION SCHEDULE

Department / Agency: Assessor-County Clerk-Recorder, Assessor (ACR-A)

Schedule Type: Departmental Records Retention Schedule (DRRS)

Division: All

Schedule #:

Section: All

**DRRS\_ACR-A\_2019\_Rev04**

With full consideration given to the preservation of the historic records of the County, the undersigned hereby certifies that this retention schedule conforms to the legal and regulatory requirements and best business practices known at this time.

Department Head:

*Peter Aldana*  
Peter Aldana, Assessor-County Clerk-Recorder

Date:

*8/26/19*

Record Series		Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
Code	Title	Description			
ACR-A-100	Annual Racehorse Tax Return	Business Personal Property	Five years from the date the returns became due	18 CCR 1045	Shred / Delete
ACR-A-125	Appraisal Records	Valuation Divisions	P	Best Practice	County Archives
ACR-A-150	Assessment Appeals	Assessment Services	When five years have elapsed since the final action on the application	GOV 25105.5	Shred / Delete
ACR-A-175	Assessment Rolls / Accumulated Journals / Parcel Number Change List	Assessment Services	P	Best Practice	County Archives
ACR-A-200	Business Property Records	Business Personal Property	When six years have elapsed since the lien date for the tax year for which that document was obtained.	RTC 465(a); RTC 834	Shred / Delete

FORM APPROVED COUNTY COUNSEL

BY: *MCT*  
MICHAEL C. THOMAS *3 SEP 2019*  
DATE

		Record Series					
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition	
ACR-A-225	Preliminary Change of Ownership Report (PCOR) and Change in Ownership Statement (CIO)	The PCOR and CIO records non-public information about the property, transferee and amount paid. State law (RTC 480.3) requires any transferee acquiring an interest in real property or manufactured home subject to property taxation, and that is assessed by the Assessor, to file a PCOR. If a PCOR is not filed at the time of recording, then the Assessor requires a CIO to be filed.	Title	When six years have elapsed since the lien date for the tax year for which that document was obtained.	RTC 465(a); RTC 834	Shred / Delete	
ACR-A-250	Change in Ownership - Completed Deeds / Special Deeds	Record of change in ownership used to determine type of re-assessment.	Title	P	Best Practice	County Archives	
ACR-A-275	Change of Mailing Address	Taxpayer requesting a change of address for the mailing of the property tax bill.	Assessment Services	2 fiscal years from the receipt date of the request	GOV 26202	Shred / Delete	
ACR-A-300	Exclusions from Re-Assessment / Transfer of Value to Replacement Dwellings	Request from taxpayer for exclusion from re-assessment for property transfers (i.e., Parent and Child, Grandparent to Grandchild & between an Individual and Legal Entity). Also, request from taxpayer for transfer of base year value to replacement dwellings for seniors and disabled persons.	Title	When six years have elapsed since the lien date for the tax year for which that document was obtained.	RTC 465(a); RTC 834	Shred / Delete	
ACR-A-325	Exemption Claims - Homeowners', Veterans' or Disabled Veterans'	Filing of property tax exemption from a homeowner, veteran or disabled veteran.	Public Service	Six years after the lien date of the tax year for which the exemption was last granted.	RTC 465(b); RTC 834	Shred / Delete	
ACR-A-350	Exemption Claims - Welfare; Church; Religious; & Historical Aircraft	Filing of property tax exemption from qualifying organizations, e.g., Welfare, Church, and Religious organizations. Includes claims filed for: Historical Aircraft, Colleges, Public School, Cemetery, Library and Museum.	Exemptions	Six years after the lien date of the tax year for which the exemption was last granted.	RTC 465(b); RTC 834	Shred / Delete	
ACR-A-375	Mapping Mapping Package - Cuts/Combines	Documentation used to assign new assessor parcel numbers. Includes, but is not limited to, forms completed by the property owners, plans, and recorded documents.	Mapping	Six years after the lien date of the tax year for which the documentation pertains.	RTC 465(a)	Shred / Delete	
ACR-A-400	Assessor Maps	Assessor maps: Assessment illustrations to define physical location and size. For assessment purposes only.	Mapping	P	Best Practice	County Archives	

		Record Series		Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
Code	Title	Description					
ACR-A-425	Manufactured Home Title Records	Records indicating name and address of mobile home owner, description of mobile home, and mobile home park plans. Includes Housing and Community Development (HCD) title reports and HCD 433(a).	Manufactured Homes	P		Best Practice	County Archives
ACR-A-450	Manufactured Home Building Records	Records describing the assessment and value information manufactured homes. Includes cost worksheets, plans and dealer reports/invoices.	Manufactured Homes	Six years after the lien date of the tax year for which the documentation pertains.	RTC 465(a)		Shred / Delete
ACR-A-475	Separate Valuations	A separation of values to a parcel(s) that is split or combined into several or one parcel(s), respectively.	Assessment Services	Six years after the lien date of the tax year for which the documentation pertains.	RTC 465(a)		Shred / Delete
ACR-A-500	State Board of Equalization Maps	Records supporting property assessed by the state (e.g., railroads and straddle counties).	Mapping	P		Best Practice	County Archives
ACR-A-525	Subvention Reports	California Open Space Subvention Act Program: provides the state with information regarding Agricultural Preserve acreage changes for the year. Substantiates refunds for lost monies due to participation in the Williamson Act.	Agriculture	9 fiscal years after the fiscal year in which created.	GOV 26202; Best Practice		Shred / Delete
ACR-A-550	Undivided Interest	Creation of an assessment to a portion of a parcel with multiple owners based on the percentage of ownership and base year acquisition.	Assessment Services	When six years have elapsed since the lien date for the tax year for which that document was obtained.	RTC 465(a); RTC 834		Shred / Delete



**County of Riverside, California**  
**Departmental Records Retention Schedule**  
**(GRRS\_2019\_Rev12)**

Enacted pursuant to Board of Supervisors, County of Riverside Resolution No. 2016-126, "Pertaining to the Management, Retention, Destruction or Disposition of County Records," and Board of Supervisors, County of Riverside Policy A-43: "County Records Management and Archives Policy."

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## Explanation of Codes

**AU** = After Audit is settled

**CFR** = Code of Federal Regulations

**FY** = Fiscal year end

**Audit Support** = Records are not required by statute or regulation to be held for the period indicated, but should be maintained to support records submitted in support of the County's internal or external auditing procedures.

**CL** = Closed, which will also mean after final resolution (as in an inquiry or litigation) after expiration (as in a contract) after final payment, etc. A record is considered "closed" when no further action is pending or required.

**GOV** = California Government Code  
**IIPP** = Illness and Injury Prevention Program  
**P** = Permanent

**AV** = Retained as long as Administratively Valuable

**COB** = Clerk of the Board

**PEN** = California Penal Code

**Best Practice** = Best Practice determined through business and government agency benchmarks.

**CR** = Creation (of the record) date

**RTC** = California Revenue and Tax Code

**BOS** = Board of Supervisors

**CU** = Current

**T** = Termination (of employment, or use, i.e. of a product or piece of equipment within the County, of a benefit or plan)

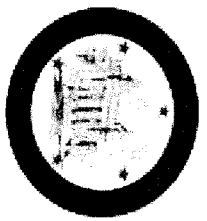
**CCP** = California Code of Civil Procedure

**CY** = Calendar year end

**USC** = United States Code

**CCR** = California Code of Regulations

**EPPA** = Employee Polygraph Protection Act (1988)



# COUNTY OF RIVERSIDE RECORDS RETENTION SCHEDULE

Department / Agency: All

Schedule Type: General Records Retention Schedule (GRRS)

Division: All

Schedule #:

## GRRS\_2019\_REV12

Section: All

With full consideration given to the preservation of the historic records of the County, the undersigned hereby certifies that this retention schedule was developed in compliance with countywide standards and policies and conforms with accepted records and information management practices.

Department Head:

*Peter Aldana*

Peter Aldana, Assessor-Clerk-Recorder

Date:

*8/26/19*

Code		Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
<b>Accounting (ACC)</b>							
ACC100	Accounts Payable	Records documenting payment required to be made for goods and services. May include claims, credit card transactions, invoices, petty cash records, refunds, vouchers and warrants.	Auditor Controller & Dept.	FY + 7	GOV 26907; Audit Support	Shred / Delete	
ACC150	Accounts Receivable	Records documenting payment received for goods and services provided by the county. May include collection notices & records, credit advices, receipts and uncollected account records. May also include daily deposit, daily balance and balance sheets.	Auditor Controller & Dept.	FY + 7	GOV 26907; Audit Support	Shred / Delete	
ACC200	Banking	Records documenting transactions with an outside financing institution. May include statements, reconciliations, deposit slips, canceled checks for minor transactions, negotiated checks, returned checks, and check registers.	Auditor Controller & Dept.	FY + 7	GOV 26907; Audit Support	Shred / Delete	
ACC250	Capital (Construction) Assets	Records related to the financial activities associated with capital (construction or building project) assets. May include inventories, material transfer files (surplus forms) and sale records.	Auditor Controller & Dept.	Disposal of Asset + 10	GOV 24051(b); CCP337.15 Best Practice	Shred / Delete	
ACC255	Collections	Records related to efforts made by the County to collect payment for services rendered. Records series includes documentation of attempt(s) to collect the payment. Records series may include bank notification of customer's insufficient fund, returned check(s) or statements, etc.	Dept.	CL + 7	GOV 26202; Audit Support	Shred / Delete	

**FORM APPROVED COUNTY COUNSEL**

BY *MCT*

*3 SEP 2019*

MICHAEL C. THOMAS

DATE

		Record Series							
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition			
ACC275	Fixed Assets	Records related to the financial activities associated with fixed assets. May include inventories, material transfer files (surplus forms) and sale records.	Auditor Controller & Dept.	Disposal of Asset + 7	GOV 24051(b); Best Practice	Shred / Delete			
ACC300	General Ledger	Contains the accounts needed to reflect the financial position of the government.	Auditor Controller & Dept.	P	Best Practice	Dept.			
ACC325	Official County Receipts	Official receipts issued to departments by the Auditor-Controller's Office.	Auditor Controller & Dept.	FY + 7	GOV 26907.2; Best Practice	Shred / Delete			
ACC350	Payroll	Records created to track the payroll of department employees. Records indicate anniversary dates, vacation and sick leave accumulations, hours worked, labor and overhead distribution reports and PEOPLESOFT reports.	Auditor Controller & Dept.	T + 75	29 CFR 516.5 (a); Audit support; Best Practice	Shred / Delete			
ACC400	Payroll - garnishments	Records related to garnishments from a County employees pay. May include accounting documents and orders.	Auditor Controller & Dept.	T + 75	29 CFR 516.6; Audit support; Best Practice	Shred / Delete			
ACC450	Transaction Summaries	Journals, registers, and subsidiary ledgers dedicated to individual funds or functions. May include accounts payable & receivable, expenditures, investments, properties and revenue, cash disbursements, cash receipts, vouchers and warrants.	Auditor Controller & Dept.	FY + 7	GOV 26907; Audit Support	Shred / Delete			
<b>Administration (ADM)</b>									
ADM100	Annual Reports - official copy	The official yearly report made by a department or agency at the close of the fiscal year stating the department's assets and liabilities and providing an overview of the department's services and programs. Typically submitted to the Board of Supervisors using a Submittal Form 11 (see entry for Submittal to the Board of Supervisors below) thereby making it part of the minutes for the meeting at which it is presented.	Dept.	P	Best Practice	County Archives (3 copies)			
ADM125	Annual Reports - work papers	Working papers used to develop the department's annual report.	Dept.	CY + 2	GOV 26202	Shred / Delete			
ADM150	Audit Reports - Management	Any audit of a department's or agency's managerial operations that is ordered by the Board of Supervisors or Executive Office.	Dept.	P	Best Practice	Dept.			

		Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition		
ADM155	Authorization to Drive County Vehicle or Private Vehicle on County Business (Form 30)	Form signed by each County employee authorizing them to drive County or personal vehicles on County business. Department is to maintain one copy while the original is forwarded to County Human Resources Safety Division.	County Human Resources	REV + 5	GOV 26202; Best Practice	Shred / Delete		
ADM175	Boards and Commissions	Record of items submitted to and decisions made by the Board of Supervisors as well as governing bodies and commissions subject to the provisions of the Brown Act. May include meeting agendas, minutes, exhibits, and staff reports as relevant to the outcome of the proceedings. May include ordinances, resolutions and policies. Should also include lists of names of members of official Boards, Committees, and Commissions.	Clerk of the Board, subject body or supporting County department.	P	GOV 25102; GOV 54950 et seq; BOS Policy A-21	COB: (GOV 25104)		
ADM200	Conflict of Interest Statement - Department Head	Statements filed (Form 700, formerly Form 730) pursuant to the California Political Reform Act of 1974 and its amendments related to the economic interests of County representatives.	Clerk of the Board	Original (COB) = CY + 7; Copy (Dept) = CY + 4	GOV 81009(e); GOV 81009(f); Best Practice	Shred / Delete		
ADM205	Conflict of Interest Statement - Designated Employees	Statements filed (Form 700, formerly Form 730) pursuant to the California Political Reform Act of 1974 and its amendments related to the economic interests of County employees as designated by resolution of the County Board of Supervisors.	Dept.	Original = CY + 7; Copy = CY + 4	GOV 81009(e); GOV 81009(f); Best Practice	Shred / Delete		
ADM210	Conflict of Interest Statement - Elected Official	Statements filed (Form 700, formerly Form 730) pursuant to the California Political Reform Act of 1974 (Section 87200) and its amendments related to the economic interests of County elected officials.	County Clerk	Original (State) = CY + 7; Copy (Clerk) = CY + 4	GOV 81009(e); GOV 81009(f); Best Practice	Shred / Delete		
ADM275	Correspondence - general	Routine correspondence issued from or received by a department that requires no further action. Records may include correspondence, memoranda (memos), notes, and acknowledgements.	Dept.	CY + 2	GOV 26202	Shred / Delete		
ADM300	Correspondence - program	Correspondence issued from or received by a department that documents specific program activity, which is not historical or policy in nature. Records may include correspondence, subject records, memoranda (memos), notes, and facsimiles.	Dept.	CL + 2	GOV 26202	Shred / Delete		
ADM310	Correspondence - public complaints	Correspondence issued from or received by a department that relates to a concern or complaint of the public. Records series may include correspondence, related memoranda and notes.	Dept.	CL + 2	GOV 26202	Shred / Delete		

		Record Series							
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition			
ADM325	Correspondence - public policy	Records that document and support the implementation of a particular policy or program such as land development, changes to County Code, procedure or organization, new taxes, etc.	Dept.	P	Best Practice	County Archives			
ADM350	Daily Activity Reports (DARs)	Reports of employee time use in relation to specific tasks or projects. Often prepared in support of daily operations and appropriations. For example, may be used as a basis for billing department or agencies or for general planning purposes.	Dept.	FY + 7	GOV 26202; Audit Support	Shred / Delete			
ADM375	Grand Jury Reports - official copy	The official report issued by and responses to a County grand jury completed after studying the operations of any public agency subject to its reviewing authority. The County Clerk holds the Copy of Record with another copy provided to the State Archivist both of which are held permanently.	County Clerk	P	PEN 933(b)	County Clerk (PEN 933(b))			
ADM400	Grand Jury Reports - work papers	Departmental copies of reports issued by and responses to the County grand jury completed after studying the operations of any public agency subject to its reviewing authority. Departmental copies may not be held longer than the copy on file with the currently impaneled grand jury, which has a mandated retention of at least five years.	Dept.	CY + 5	PEN 933(c)	Shred / Delete			
ADM425	Grants	Records related to the application, award, implementation and conclusion of a grant. All records including those related to the receipt and dispersal of grants funds, contract and reports. Grant records should be maintained together. Records may include the proposal document, correspondence, activity summary reports, financial and performance reports, memos, notes, invoices, billings, expense reports, completion check-off form, audit results, etc.	Dept.	CL + 7	2 CFR 200.333; Audit Support and as required by the terms of the grant; Best Practice	Shred / Delete			
ADM435	Meeting Minutes - Departmental	Official minutes of a departmental meeting that document significant decisions made by department staff. Records series may include distributed items or other attachments.	Dept.	CR + 2	GOV 26202; Best Practice	Shred / Delete			
ADM450	Policy & Procedure - Boards and Commissions	Records documenting the policies and procedures approved for the County's Board of Supervisors and various committees and commissions. May include final policy, policy statements, by-laws and procedure manuals.	Clerk of the Board, subject body or supporting County department.	P	Best Practice	County Archives			

Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
ADM475	Policy & Procedure - departmental	Records documenting departmental policy and procedure. May include final policy, policy statements, procedure manual. May also include mission statements and organizational charts.	Dept.	REV + 3	GOV 26202; Best Practice	County Archives
ADM480	Policy & Procedure - program	Records documenting the policies and procedures governing the operations of Countywide public and/or County employee programs. May include final policy, policy statements, by-laws, and procedure manuals.	Dept. responsible for implementing	REV + 3	GOV 26202; Best Practice	County Archives
ADM500	Public Information / Media	Records created for distribution announcing matters related to county business or administrative operations. May include press releases, newsletters, slides, negatives, video, photographs, etc. Photographic (image) records should include full identification (dates, names, places and occasion) for each image.	Dept.	CY + 2	GOV 26202	Shred / Delete
ADM505	Public Records Requests	Records distributed to the public in response to a public records request. Records series includes the original request, the department response and a <u>copy</u> of the records provided if applicable.	Dept.	CY + 2	GOV 26202	Shred / Delete
ADM525	Recordings of Public Meetings	Audio or video recordings of the official proceedings of a public body subject to the Brown Act. See ADM175 above. Audio or video recordings of the proceedings of the Board of Supervisors are held by the Clerk of the Board in accordance with the Clerk of the Board's records retention schedule.	The subject body or supporting County department.	After minutes are written but no less than 30 days	GOV 54953.5 (b)	Shred / Delete
ADM575	Records Disposition Certificates	Certificates authorizing and confirming the destruction of records once eligible and as defined on the appropriate records retention schedule. Records series must also include authorized signature lists.	Dept. and ACR-RMAP	P	CSA; Best Practice	Dept. and ACR-RMAP
ADM600	Records Retention Schedule	An approved records retention schedule that furnishes public agencies with legal authority to determine final disposition of their records regardless of their format.	Dept.	REV + 4	GOV 26202; CCP 343; Best Practice	Shred / Delete
ADM610	Records Transfer List	A form listing the records sent off-site for storage. This form contains information related to the contents of containers and links the contents to a container barcode for tracking and reference purposes.	Dept and ACR-RMAP	Destruction of all listed containers + 2	GOV 26202; Best Practice	Shred / Delete

		Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition		
ADM615	Resolutions	Resolutions submitted to and approved by the Board of Supervisors. Records series includes, at minimum, the Minute Order, complete text of the Resolution and any supporting documentation.	Initiating Dept and Clerk of the Board	P	GOV 25102; GOV 26205.1; Best Practice	Dept and COB		
ADM625	Submittal to the Board of Supervisors (Form 11s)	Items submitted for consideration to the Board of Supervisors, including records of proceedings and written descriptions of business conducted. May include annual reports, grand jury reports, and management reports.	Clerk of the Board	P	GOV 25102	COB; (GC 25104)		
ADM650	Surveys	Responses to questionnaires, surveys, including comment cards or other feedback, received from the public.	Dept.	CY + 2	GOV 26202	Shred / Delete		
ADM750	Video Monitoring	Recordings of on-going or daily operations. Records include routine video of operations that are not needed for an investigation including mobile in-car video and building surveillance video.	Dept.	12 months and with written consent of dept. attorney.	GOV 26202.6	Delete		
<b>Finance (FIN)</b>								
FIN100	Audit reports	Record of the examination of county finances as prepared by internal or external auditors. May include financial reports and statements showing the status of all county funds and the narrative audit report.	Auditor Controller & Dept.	P	Best Practice	Dept.		
FIN150	Bids - accepted	Record of accepted submissions offered by a vendor or contractor selling goods or services to the County. May include bid (plus spreadsheet and award letter), proposal, request for quotation (RFQ), request for proposal (RFP) and request for information (RFI).	Dept.	Termination of Contract + 7	CCP 337; GOV 26202; Audit Support	Shred / Delete		
FIN200	Bids - rejected	Record of submissions offered by a vendor or contractor selling goods or services to the County other than the one that is accepted. May include bid (plus spreadsheet and award letter), proposal, request for quotation (RFQ), request for proposal (RFP) and request for information (RFI).	Dept.	FY + 2	GOV 26202.1	Shred / Delete		
FIN250	Budgets - approved	The budget document formally approved for the County by the Board of Supervisors. This includes the original budget along with its Form 11 initially adopted and any authorized modifications to it through the end of the fiscal year.	Clerk of the Board; Auditor Controller	P	GOV 25102	County Archives		

		Record Series					
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition	
FIN300	Budgets - supporting information	Records supporting the approved County budget and maintained as audit support. May include submissions and appeals in addition to budget manuals, spreadsheets, statistics, County Auditor Controller directives, and other data accumulated in the budget development, submission and presentation process.	Dept.	FY + 7	GOV 26202; Audit Support	Shred / Delete	
FIN350	Financial reports - annual	Financial reports produced for a single fiscal year in order to monitor spending, workflow, performance measures and other department operations. May include monthly revenue & expenditure reports, annual fixed asset ledgers, and appropriation transfers.	Auditor Controller & Dept.	FY + 7	GOV 26907; GOV 26202; Audit Support	Shred / Delete	
FIN400	Purchasing Records	Records created to document the purchases and payments for supplies, equipment and services. May include official copy of purchase order, purchase requisitions (requests), purchasing contracts, payment authorizations, receipts/packing slips.	Dept.	CL + 7	GOV 26907; GOV 25501.5; Audit Support	Shred / Delete	
FIN450	Purchasing Source Documents	Records related to the purchase or acquisition of minor goods or services. May include catalogs, receiving documents and vendor literature.	Dept.	FY + 2	GOV 26202	Shred / Delete	
<b>Health and Safety (HSA)</b>							
HSA100	Emergency Action and Fire Prevention Plans	Plans for evacuation of agency facilities in cases of emergency and plans to prevent fires. Records series may include fire drill action plans and safety checklists.	Dept. and County Human Resources	REV + 2	29 CFR 1910.38-.39; GOV 26202; 8 CCR 3220; Best Practice	Shred / Delete	
HSA125	Fire Extinguisher Records	Records related to the inspection and maintenance of fire extinguishers. Records belonging to this series will be made available to the Assistance Secretary of Cal/OSHA upon request.	Dept. and County Human Resources	Life of equipment + 1	29 CFR 1910.157(e) (3); 8 CCR 6151	Shred / Delete	
HSA150	Fire Orders	Orders issued by the Fire Marshal to correct deficiencies in compliance with the fire code.	Dept. and County Human Resources	CL + 3	GOV 26202; Best Practice	Shred / Delete	
HSA200	First Aid Records	Records documenting one-time first aid treatment and subsequent observation of minor illnesses and injuries if made onsite by a non-physician and maintained separately from the employee medical records.	Dept. Human Resources	T + 3	29 CFR 1910.1020(d-1)(i-B); Best Practice	Shred / Delete	



		<b>Record Series</b>						
<b>Code</b>	<b>Title</b>	<b>Description</b>	<b>Copy of Record</b>	<b>Official Record Retention</b>	<b>Citation / Rationale</b>	<b>Final Disposition</b>		
HSA250	Hazard Communication Plans	Records related to the approved procedures for the effective communication of workplace hazards, including container labeling and other forms of warning; material safety data sheets and employee training, that are developed in compliance with OSHA 29 CFR 1910.1200.	Dept. and County Human Resources	REV + 5	GOV 26202; Best Practice	Shred / Delete		
HSA300	Hazardous Exposure Records	Records related to employee exposure to toxic substances or harmful physical agents. May include accident reports, allegations of employee exposure, audiometric test records, damage reports, employee medical records, environmental permits, environmental monitoring methodologies, calculations and results, biological monitoring results and chemical inventories or other records that indicate where and when a toxic substance or harmful physical agent was in use.	Dept. and County Human Resources	30 years or T + 30, whichever is longer	29 CFR 1910.1020(d)(ii)	Shred / Delete		
HSA350	Injury and Illness Prevention Program	Records related to the steps taken to implement and maintain the Injury and Illness Prevention Program. Includes records of schedules and periodic inspections required by Cal/OSHA and the actions taken to correct unsafe conditions and records documenting required safety and health training. Also includes documentation of safety training for all employees including who attended and the topic discussed. May also include Safety Committee meeting records including issues discussed at meetings and results of investigation reviews.	Dept. and County Human Resources	CY + 3	8 CCR 3203 (b)(1-2) & (c); County of Riverside IIPP Standard; Best Practice	Shred / Delete		
HSA400	Injury and Illness Reports	Records related to reporting and documentation of employee injury or illness. Records may include the Cal/OSHA logs and summary forms [300, 300A and 301], decompression sickness incidents, dive team medical records, log of occupational injury or illness resulting in medical care. NOTE: In January 2002, Cal/OSHA replaced Form 200 with Forms 300, 300A and 301.	Dept. and County Human Resources	CY + 5	29 CFR 1904.33; 8 CCR 14300.33	Shred / Delete		
HSA450	Safety Data Sheets (SDS)	SDS issued by manufacturers. Records series also includes correspondence related to procedures for submission of these forms to the Safety Office and MSDS indexes.	County Human Resources	T + 30	29 CFR 1910.1020(d)(1)(ii) (B)	Shred / Delete		

		Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition		
<b>Legal (LEG)</b>								
LEG100	Contracts / Agreements - general	The binding agreement to provide goods or services including employment, but excluding those for land, buildings or major improvements. May include the original contract or agreement, all change orders and any amendments thereto. May also include accounting records, procurement documentation, and salary administration. May also include working files if they relate to negotiations or changes.	Three copies: Clerk of the Board, Initiating Department and Purchasing Services	CL + 7	CCP 337; Audit Support	Shred / Delete		
LEG150	Contracts / Agreements - government	The binding agreement between a County department and another government agency to provide goods or services. May include the original contract or agreement, all change orders and any amendments thereto. May also include accounting records, procurement documentation, and salary administration. May also include working files if they relate to negotiations or changes.	Three copies: Clerk of the Board, Initiating Department and Purchasing Services	CL + 7	48 CFR 4.805; Best Practice	Shred / Delete		
LEG200	Contract / Agreements - capital improvements	The binding agreement related to major improvements to County buildings or land. May include the original contract or agreement and any amendments thereto. May also include working files if they relate to negotiations or changes and compliance.	Three copies: Clerk of the Board, Initiating Department and Purchasing Services	CL + 10	CCP 337.5(a)	Shred / Delete		
LEG250	Insurance Policies - any liability coverage	A written agreement stating the obligations and responsibilities of each contracting party.	Human Resources	P	Best Practice	Dept.		
LEG300	Insurance Policies-Workers	A written agreement stating the obligations and responsibilities of each contracting party.	Human Resources	P	Best Practice	Dept.		
LEG350	Insurance Policies - first party coverage only	A written agreement stating the obligations and responsibilities of each contracting party.	Human Resources	T + 4	GOV 26202; CCP 337; Best Practice	Shred / Delete		
LEG400	Leases - excluding real property	Documentation of rental agreements, capital leases, operational lease/purchase agreements or any other similar agreement and the amendments thereto.	Dept.	CL + 4	GOV 26202; CCP 337; Best Practice	Shred / Delete		
LEG450	Leases - real property	Documentation of rental agreements, capital leases, operational lease/purchase agreements or any other similar agreement and the amendments thereto.	Dept.	CL + 4	CCP 337.2	Shred / Delete		

		Record Series		Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
Code	Title	Description					
LEG500	Legislative Liaison Records	Records documenting the progress of legislation of particular interest to a department. May include copies and drafts, correspondence, testimony, as well as background and research material.	Dept.	Until passed, failed or dropped by department + 2	GOV 26202; Best Practice	Shred / Delete	
LEG550	Litigation Records	Records related to legal correspondence, pleadings and copies of court records. Records series may include transcripts, notices, interrogatories and depositions.	Dept.	CL + 10	CCP 1952.3; Best Practice	Shred / Delete	
LEG600	Public Hearings Records	The official record of any public hearing where a forum for citizens or constituent group may voice opinions and concerns to public officials. These hearings are held separately from a regular or special meeting of a Board, Committee or Commission. May include agenda, minutes, submitted and/or distributed materials, transcripts, speaker sign up, written testimony, and official notices.	Clerk of the Board, subject body or supporting County department.	P	Best Practice	Dept.	
LEG700	Subpoenas and Subpoenas Duces Tecum - challenged	Records related to subpoenas or subpoenas duces tecum received by a County department where the department has challenged the requirement to comply. Records series pertains only to those subpoenas where the County is not a party to the litigation.	Dept.	Resolution + 2	GOV 26202; Best Practice	Shred / Delete	
LEG750	Subpoenas and Subpoenas Duces Tecum - record of compliance	Records related to subpoenas and subpoenas duces tecum received by a County department where the department has fully complied. Records series pertains only to those subpoenas where the County is not a party to the litigation.	Dept.	Compliance + 2	GOV 26202; Best Practice	Shred / Delete	
<b>Office Management (OFM)</b>							
OFM100	Equipment	Records related to the maintenance, repair and inventory of County leased or owned equipment and vehicles. May include equipment calibration records, maintenance records, motor vehicle records and surplus forms.	Dept.	end of lease or ownership + 7	GOV 24051; Best Practice	Shred / Delete	
OFM150	Facilities	Records related to the maintenance, repair and inventory of County owned property. May include maintenance work orders and repair reports.	Dept.	end of lease or ownership + 7	GOV 24051; Best Practice	Shred / Delete	
OFM200	Returned Mail	Mail returned to sender as undeliverable. This series does not include cases where proof of attempt to notify may be required.	Dept.	CY + 2	GOV 26202	Shred / Delete	
OFM225	Security Access Records	Records related to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instructions of access to agency facilities, equipment or automated systems.	Dept.	T + 2	GOV 26202; Best Practice	Shred / Delete	

Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
OFM250	Telephone Call Logs	Formal logs of incoming and outgoing telephone calls.	Dept.	FY + 3	GOV 26202; Best Practice	Shred / Delete
OFM300	Telephone Messages	Relevant notes documenting calls received that pertain to department activities.	Dept.	CY + 2	GOV 26202	Shred / Delete
OFM325	Vehicle Usage Reports	Records related to the use of County vehicles by County employees on County business. Records include mileage reports that contain the name of the employee utilizing the county vehicle, the date(s) the vehicle was used by the employee, the purpose of the trip and the starting and ending mileage.	Dept.	FY + 7	BOS Policy D-2; Audit Support	Shred / Delete
OFM350	Visitor Registration	Visitor logs, registers, or similar records documenting visitor access to limited access or restricted areas of agency facilities.	Dept.	CY + 3	GOV 26202; Best Practice	Shred / Delete
OFM400	Work Orders - originator copies	Work requests for maintenance services performed on County vehicles, equipment or property.	Dept.	CY + 2	GOV 26202	Shred / Delete
<b>Personnel (PER) - all records within this Group require confidential destruction</b>						
PER050	Affirmative Action Reports	Reports requested by the Board of Supervisors relating to compliance with statutes and regulatory requirements of the Equal Employment Opportunity Commission (EEOC).	Dept.	FY + 5	29 CFR 1602.32; 29 CFR 30.12(d); Best Practice	Shred / Delete
PER100	Application and Selection Records	Includes notes of interviews with candidates, questions asked of applicants, and audio and videotapes of job interviews. Records series may include any form of employment inquiry submitted to the employer in response to an advertisement or other notice of existing or anticipated job openings, and disclosure, records pertaining to the failure to hire any individual, medical and psychological disqualifications, polygraph results, resumes, test papers and test results.	Dept. and County Human Resources	Successful: place in Personnel File; Unsuccessful: Close of Process + 3	29 CFR 1627.3; 29 CFR 801.30; 29 CFR 1602.31; GOV 12946; Best Practice	Shred / Delete
PER110	Background Checks	Records of background check request, report and related correspondence. Information shall be maintained separately from employees' official personnel file (Civil Code 1798.40(d)).	Dept. and County Human Resources	CR + 2	29 CFR 1627.3; 29 CFR 1602.31; GOV 12946; GOV 26202; Best Practice	Shred / Delete

Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
PER150	Complaints / Grievances	Records documenting the prevention and/or resolution of problems involving individuals and related to work situations. Includes documentation of employee grievances, charges related to discrimination or harassment including those filed under or by EEOC/DFEH, County C-25 Harassment, Public Employment Relations Board (PERB), or a violation of Meyers-Millas-Brown Act. May also include an action brought by the Commission or the Attorney General against an employer under title VII.	County Human Resources	CL + 3	29 CFR 1602.31; 29 CFR 1602.14; GOV 12946; Best Practice	Shred / Delete
PER200	Corrective or Disciplinary Actions - Supervisors' copies	Supervisors' reference copies of records documenting the prevention and/or resolution of problems involving individuals and related to work situations. Records may include arbitration decisions, demotions, documents pertaining to the action taken for reconsideration or appeal, employee discipline matters, investigation reports, notice of appeals, notice of discipline, records pertaining to adverse job actions, suspensions, terminations and written reprimands.	Dept.	CR + 2	29 CFR 1602.31; Best Practice	Shred / Delete
PER250	Employee Expense (Travel) Reports	Records related to employee travel on County business including justification. May include correspondence, requests, authorizations, itineraries, record of travel advances and expense reports.	Auditor Controller	FY + 7	GOV 26202; Audit Support	Shred / Delete
PER260	Ethics Training for Local Officials	Records related to the mandatory ethics training for local officials required by AB1234, codified at CA Government Code §§53235 et seq. Records series includes the notices of training, and certificates of completion that document the date the official completed the training and the entity that provided the training.	Dept. and Clerk of the Board	CY + 5	GOV 53235.2 (b)	Shred / Delete
PER300	Leave of Absence Reports / Requests	Records related to any employee request for leave of absence for medical or non-medical reasons. Series includes reviews, working documents, and supporting documentation.	County Human Resources	CL + 3	29 CFR 825.500; 29 CFR 516.5; 29 USC 211; GOV 26202; Best Practice	Shred / Delete
PER350	Leave Reports / Requests	Records related to employee request for annual leave, vacation, holiday, comp or sick leave under County rules. Series includes reports, approvals and working documents.	Dept. Human Resources	FY + 3	29 CFR 825.500(g); GOV 26202; Best Practice	Shred / Delete

Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
PER375	Medical Records - Employees	Records concerning the health status of an employee which is made or maintained by a physician, nurse, or other health care personnel. Records series may include dates of treatment, evaluations, medical health questionnaires or history, medical record subpoenas, return to work paperwork, and/or treatment plan diagnosis.	Dept. and County Human Resources	T + 30	8 CCR 3204 (d)(1)(A) and 3204(c)(5); 29 CFR 1910.1020(d)(1)(i) and 1910.1030(h)	Shred / Delete
PER390	Participant Form - Employee Health and Well-Being Activities	Records related to an employee's voluntary participation in a health or well-being activity allowed under Board of Supervisors Policy A-35.	Dept.	Termination of Activity + 2	CCP 335.1; GOV 911.2; GOV 26202; Best Practice	Shred / Delete
PER400	Personnel Files	Records documenting an employee's employment history. Records may include appointment letters, college transcripts, demotion, disciplinary notices or documents, employment applications & verifications, exit interviews, layoff, letters of recognition, new hire paperwork, performance evaluations, permanent status letter, personal data information changes, position descriptions, promotions, recall, or discharge, rates of pay, reclassification or reassignment, resume, selection for training, termination paperwork including last date of service, test documents if used as a basis for employment decision. Files may also contain employee-related records that are scheduled for temporary retention. Personnel files are kept current by removing temporary records upon expiration of the retention periods specified.	Dept. and County Human Resources	T + 75	GOV 26202; Best Practice	Shred / Delete
PER410	Personnel Files - Supervisor's Copy	Supervisor's copy of records documenting an employee's work history from one evaluation to the next. Records may include relevant correspondence including email, copies of disciplinary actions, memoranda and notes. The information is maintained and used to complete the employee's annual evaluation.	Dept.	Completion of employee's annual evaluation + 1	GOV 26201; Best Practice	Shred / Delete
PER450	Personnel Service Awards & Certifications	Records documenting employee awards, including recommendations, approved nominations, memoranda, correspondence, reports, and related policies pertaining to agency-sponsored awards. May include awards or certifications from other government agencies or private organizations.	Dept.	CY + 2	29 CFR 1602.31	Shred / Delete

Record Series						
Code	Title	Description	Copy of Record	Official Record Retention	Citation / Rationale	Final Disposition
PER500	Policies & Procedures - Personnel	Records related to any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency. Includes list of current County services, description of employee benefits, description of facilities, employee handbook, employee resources, employee services, operational procedures, union recognition and work schedules.	Dept. and County Human Resources	REV + 3	GOV 26202; Best Practice	Shred / Delete
PER550	Time Cards and Time Sheets	Record and verification of the time worked by each employee for purposes of issuing salary warrants. Includes documentation supporting work schedules and shift/crew assignments as well as authorization for overtime. May include employee name, employee number, days and hours worked, vacation, sick or compensatory time used by employees or similar records noting exceptions to normal work hours and often including the department head or supervisor approval.	Dept. Human Resources	CY + 7	29 CFR 516.6; 29 CFR 1620.33(b); Audit Support	Shred / Delete
PER600	Training History	Records retained to confirm participation in and successful completion of job related training programs. Includes documentation of employee continuing education, training and development, including employee identification, training received, dates of training and related records.	Dept. and County Human Resources	T + 2	29 CFR 1602.31; 29 CFR 1602.14; GOV 12946; Best Practice	Shred / Delete
PER650	Unemployment	Records documenting unemployment compensation claims. Records shall include a true and accurate work record which includes all workers and their status (employed, on layoff or leave of absence). Records series includes claims, pertinent correspondence, and similar material relating to unemployment compensation cases.	Dept. and County Human Resources	CL + 7	22 CCR 1085-2(c); Best Practice	Shred / Delete
PER700	Volunteer Files	Records documenting a volunteer's service history. Records series may include acceptance letter, correspondence, duties or responsibilities, qualifications and/or resume, etc.	Dept.	T + 3	GOV 26202; Riverside County Ord. 440 § 11.c; Best Practice	Shred / Delete