

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



**ITEM: 3.12
(ID # 30203)**

MEETING DATE:

Tuesday, May 05, 2026

FROM : RIVERSIDE COUNTY INFORMATION TECHNOLOGY AND ASSESSOR-
COUNTY CLERK-RECORDER

SUBJECT: RIVERSIDE COUNTY INFORMATION TECHNOLOGY (RCIT) AND ASSESSOR -
COUNTY CLERK – RECORDER (ACR): Approve and execute Amendment No. 5 to Agreement
ITARC-000786 for Laserfiche Software License Renewal and Support Services by and between
MCCi, LLC and the County of Riverside to provide One-Time Laserfiche Professional Services
for the Riverside County Assessor-County Clerk-Recorder, All Districts. [Total Cost \$39,600 and
additional compensation not to exceed \$5,940; – RCIT Budget-0%, ACR Budget-100%]

RECOMMENDED MOTION: That the Board of Supervisors:

1. Approve and execute Amendment No. 5 to Agreement ITARC-000786 for Laserfiche Software License Renewal and Support Services by and between MCCi, LLC and the County of Riverside to provide One-Time Laserfiche Professional Services for the Riverside County Assessor-County Clerk-Recorder; authorize the Chair of the Board to execute three (3) copies of the same on behalf of the County;
2. Authorize the Purchasing Agent, in accordance with Ordinance 459, based on the availability of fiscal funding and as approved as to form by County Counsel to: a) sign amendments that exercise the options of the Agreement and b) sign amendments to the compensation provisions that do not exceed the total aggregate of \$5,940 for future unforeseen requirements for the term of the Agreement;
3. Direct the Purchasing Agent or designee, to issue Purchase Orders for the required services that do not exceed the BOS total approved amount for the term of the Agreement; and
4. Direct the Clerk of the Board to retain one (1) copy and return two (2) copies of the Amendment to RCIT for distribution.

ACTION:Policy


Gustavo Vazquez

3/31/2026


Steven Horn, Assistant Assessor-County Clerk-Recorder

3/31/2026

MINUTES OF THE BOARD OF SUPERVISORS

On motion of Supervisor Medina, seconded by Supervisor Washington and duly carried,
IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Medina, Spiegel, Washington, and Perez
Nays: None
Absent: Gutierrez
Date: May 5, 2026
xc: RCIT, ACR

Kimberly A. Rector
Clerk of the Board

By: 
Deputy

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

FINANCIAL DATA	Current Fiscal Year:	Next Fiscal Year:	Total Cost:	Ongoing Cost
COST	\$ 39,600	\$ 0	\$ 39,600	\$ 0
NET COUNTY COST	\$ 39,600	\$ 0	\$ 39,600	\$ 0
SOURCE OF FUNDS: ACR Budget-100%			Budget Adjustment: No	
			For Fiscal Year: FY 25/26	

C.E.O. RECOMMENDATION: Approve

BACKGROUND:

Summary

The request before the Board is to approve Amendment No. 5 to Agreement ITARC-000786 with MCCi, LLC to provide Laserfiche professional services for the Riverside County Assessor-County Clerk-Recorder (ACR). These services will support the implementation of a Laserfiche repository to enable ACR to manage documents from record creation through retention and disposition.

The scope includes configuring a dedicated Laserfiche repository to manage documents, enabling document capture, retention schedules and migrating records from ACR's existing document management system to the County's enterprise Laserfiche environment. The effort also includes knowledge transfer and documentation to prepare County staff for ongoing administration and support following implementation.

MCCi, LLC possesses the specialized expertise required to configure the Laserfiche repository in alignment with the County's enterprise Laserfiche platform. Approval of this amendment will ensure ACR's document management system is standardized, integrated, and supported within the County's trusted enterprise framework, with continued technical support and product updates to maintain security and reliability of this critical system.

Impact on Residents and Businesses

There is no negative impact on citizens or businesses.

Contract History and Price Reasonableness

ITARC-000786 was executed by the Board of Supervisors on May 21, 2024. This contract with ECS Imaging, Inc. is based on utilization of the National Cooperative Purchasing Alliance (NCPA) contract #01-159. Region 14 Education Service Center based out of Abilene, Texas processed a Request for Proposal (RFP) Solicitation No. 36-22 published on October 4, 2022, on behalf of itself and other Government Agencies through NCPA for Document and Record Management. Laserfiche was awarded after the evaluation of bid responses. An Amendment to Contract #ITARC-000786 with the Consent to Assignment executed on May 12, 2025 by MCCi, LLC and ECS Imaging, Inc. and Riverside County to acknowledge that ECS and MCCi have joined forces and now together operate under the MCCi legal entity.

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

ATTACHMENTS:

A. Amendment No. 5 to Agreement NO. ITARC-000786


Melissa Curtis, Deputy Director of Purchasing and Fleet 4/16/2026


Alonzo Barrera, Principal Management Analyst 4/27/2026


Sarah Franco, Assistant County Executive Officer 4/29/2026


Aaron Gettis, Chief Deputy County Counsel 4/24/2026

COUNTY OF RIVERSIDE
AMENDMENT NO. 5 TO LASERFICHE SOFTWARE LICENSE RENEWAL AND
SUPPORT SERVICES
AGREEMENT WITH MCCi, LLC.

Original Contract Term:	July 1, 2025 through June 30, 2026
Original Contract ID:	ITARC-000786
Original Contract Amount	\$314,081.00
Amended Contract Amount	\$353,681.00

This Amendment No. 5 to the Laserfiche Software License Renewal and Support Services Agreement with MCCi, LLC. (“Amendment No. 5”), is entered into by and between the County of Riverside (“COUNTY”), a political subdivision of the State of California, and MCCi, LLC., (“CONTRACTOR”) a California corporation sometimes collectively referred to as the “Parties”.

RECITALS

WHEREAS, the COUNTY entered into that certain Reseller Agreement for Laserfiche Software License Renewal and Support Services with ECS Imaging, Inc. effective July 1, 2024. Contract # ITARC-000786 (the “Agreement”), whereby CONTRACTOR among other things, authorized COUNTY to use Laserfiche Software License Renewal and Support Services (as defined therein).

WHEREAS, COUNTY and CONTRACTOR amended the Agreement for the first time to revise Exhibit A “Payment Provision” Table 1 – Section 2 Annual Maintenance to increase the Annual Subtotal from \$14,651.84 to \$43,051.00.

WHEREAS, COUNTY and CONTRACTOR amended the Agreement for a second time to delete Exhibit A-Payment Provisions and replace it with Exhibit A-1 “Payment Provision” to increase the quantity for Software Subscription for SKU #ECSGOLD- ECS – GOLD Priority Support from 70 to 91 for a new total of \$1,925.

WHEREAS, COUNTY and CONTRACTOR amended the Agreement for the third time to exercise the renewal option to extend the Period of Performance for one (1) year through June 30, 2026, and to remove ECS Imaging, Inc. as company name and change to MCCi, LLC. MCCi, LLC and ECS Imaging, Inc. joined forces effective May 1, 2025. The combined firm will operate together under one (MCCi, LLC) legal entity.

WHEREAS, COUNTY and CONTRACTOR amended the Agreement for the fourth time to exercise the last renewal option to extend the Period of Performance through June 30, 2027, delete Exhibit A-1 “Payment Provisions” and replace it with Exhibit A-2 “Payment Provisions” to update the Annual Support/Subscription Renewal costs and add Exhibit B-1 MCCi Professional Services – Statement of Work for Password-Protected PDF Detection Enhancement for Riverside County Public Health CCS Online Application for a total of \$11,375.00, that will be applied to the Additional Annual Compensation.

WHEREAS, COUNTY and CONTRACTOR now desire to amend the Agreement for the fifth time to add Exhibit B-2 MCCi Professional Services – Statement of Work for Riverside County Assessor-County Clerk-Recorder (ACR) – Trusted Systems Laserfiche Solution Update and to increase the Annual Subtotal for FY 25/26 from \$314,081.00 to \$353,681.00.

COUNTY OF RIVERSIDE
AMENDMENT NO. 5 TO LASERFICHE SOFTWARE LICENSE RENEWAL AND
SUPPORT SERVICES
AGREEMENT WITH MCCi, LLC.

NOW, THEREFORE, for good and valuable consideration the receipt and adequacy of which is hereby acknowledged, the Parties agree as follows:

1. The above recitals are true and correct and are incorporated herein by reference.
2. Amend the Agreement to add Exhibit B-2 MCCi Professional Services – Statement of Work for Riverside County Assessor-County Clerk-Records (ACR) – Trusted Systems Laserfiche Solution Update and to increase the FY 25/26 Annual Subtotal to \$353,681.00 for these One-Time Professional Services, Exhibit B-2 attached hereto.
3. Capitalized Terms/Amendment to Prevail. Unless defined herein or the context requires otherwise, all capitalized terms herein shall have the meaning defined in the Agreement, as heretofore amended. The provisions of this Amendment No. 5 shall prevail over any inconsistency or conflicting provisions of the Agreement, as heretofore amended, and shall supplement the remaining provisions thereof.
4. Miscellaneous. Except as amended or modified herein, all the terms of the Agreement shall remain in full force and effect and shall apply with the same force and effect. Time is of the essence in this Amendment No. 5 and the Agreement and each and all of their respective provisions. Subject to the provisions of the Agreement as to assignment, the agreements, conditions and provisions herein contained shall apply to and bind the heirs, executors, administrators, successors and assigns of the parties hereto. If any provisions of this Amendment No. 5 or the Agreement shall be determined to be illegal or unenforceable, such determination shall not affect any other provision of the Agreement and all such other provisions shall remain in full force and effect. The language in all parts of the Agreement shall be construed according to its normal and usual meaning and not strictly for or against either COUNTY or CONTRACTOR.
5. USE OF ELECTRONIC SIGNATURES: This Amendment may be executed in any number of counterparts, each of which will be an original, but all of which together will constitute one instrument. Each party of this Amendment agrees to the use of electronic or digital signatures that meet the requirements of the California Uniform Electronic Transactions Act (“the Act”) Cal. Civ. Code §§ 1633.1-1633.17), for executing this Amendment. The parties further agree that the electronic or digital signatures of the parties included in this Amendment are intended to authenticate this writing and to have the same force and effect as manual signatures. The Act authorizes use of an electronic signature for transactions and contracts among parties in California, including governmental agencies. For purposes of this section, a digital signature is a type of "electronic signature" as defined in subdivision (i) of Section 1633.2 of the Civil Code.
6. CORPORATE SIGNERS: Pursuant to California Corporations Code Section 313, please provide signature of chairperson of the board, president, or any vice president, and the secretary, any assistant secretary, the chief financial officer, or any assistant treasurer. If providing only one signature, please also provide a resolution or other proof of delegated authority that shows signer can legally bind the corporation.
7. Effective Date. This Amendment No. 5 shall not be binding or consummated until it is fully executed by the Parties.

COUNTY OF RIVERSIDE
AMENDMENT NO. 5 TO LASERFICHE SOFTWARE LICENSE RENEWAL AND
SUPPORT SERVICES
AGREEMENT WITH MCCi, LLC.

IN WITNESS WHEREOF, the Parties hereto have caused their duly authorized representatives to execute this Amendment No. 5.

COUNTY OF RIVERSIDE, a political
subdivision of the State of California

MCCi, LLC
a California Corporation

By: Karen S. Spiegel
Name: Karen Spiegel
Title: Chair, Board of Supervisors

E-SIGNED by Victor D'Aurio
on 2026-04-02 18:31:59 GMT
By: _____
Name:
Title:

Dated: MAY 05 2026

Dated: April 02, 2026

ATTEST:
Kimberly Rector,
Clerk of the Board

By: [Signature] DEPUTY

APPROVED AS TO FORM:
Minh C. Tran
County Counsel

By: [Signature]
Kristine Bell-Valdez
Deputy County Counsel
Dated: 3/24/26

MCCi SERVICES ORDER

Quote 40849 (the "Order") is entered into as of April 02, 2026, ("Order Effective Date"), by and between MCCi and Client and is hereby incorporated into the Master Agreement and made a part thereof. If there is any conflict between a provision of the Master Agreement and this Order, the Order will control. Any capitalized terms not otherwise defined herein shall have the meaning set forth in the Master Agreement. This Order supersedes any previous quote or proposals received. Use of pre-printed forms, including, but not limited to, email, purchase orders, shrink-wrap or click-wrap agreements, acknowledgements, or invoices, is for convenience only, and all unilaterally issued and/or pre-printed terms and conditions stated thereon, except as specifically set forth in this Order, are void and of no effect.

IN WITNESS WHEREOF, the parties hereto have caused this Order to be executed by their respective duly authorized representatives as of the Order Effective Date.

MCCi, LLC ("MCCi")

RIVERSIDE COUNTY ("Client")

E-SIGNED by Victor D'Aurio
mcc_i justfor
Signed: on 2026-04-02 18:32:01 GMT

Signed: Karen S. Spiegel

Name: Victor D'Aurio

Name: KAREN SPIEGEL

Title: COO

Title: CHAIR, BOARD OF SUPERVISORS

Date: April 02, 2026

Date: MAY 0 5 2026

ATTEST:
KIMBERLYA. RECTOR, Clerk

By [Signature]
DEPUTY

PRICING: MCCi SERVICES



3717 Apalachee Parkway, Suite 201
Tallahassee, FL 32311
850.701.0725
850.564.7496 fax

Bill to: Mike Brown
mbrown@asrclkrec.com

Ship to: Mike Brown
mbrown@asrclkrec.com

cc AP Contact: mbrown@asrclkrec.com

Client Name: Riverside County

Quote Date: March 20, 2026

Client Address: 3900 Main Street, Riverside, CA 92502

Quote Number: 40849

Order Type: Services

Service Description:

Qty. Unit Cost Total

MCCI PROFESSIONAL SERVICES - STATEMENT OF WORK

<input checked="" type="checkbox"/> County ACR - Trusted Systems Laserfiche Solution Update - AWS to Laserfiche Automated & Retention Process <i>Please see detailed Exhibit A: Statement of Work (SOW).</i>	1	\$39,600.00	\$39,600.00
Professional Services Subtotal			\$39,600.00

GRAND TOTAL - ONE-TIME SERVICES \$39,600.00

TOTAL LASERFICHE PROJECT COST \$39,600.00

All Quotes Expire 30 Days from Quote Date

This is NOT an invoice. Please use this confirmation to initiate your purchasing process.

SALES TAX

Sales tax will be invoiced where applicable and is not included in the fee quote above.

SERVICES

All services will be performed remotely unless noted otherwise. All Services pricing assumes the Client will grant MCCi **secure unattended access**.

BILLING TERMS

MCCi will invoice Client as follows:

Product/Service Description	Timing of Billing
Professional Services: Statement of Work	Defined in Statement of Work

MCCi shall not send any invoices nor claim payment for any fees or expenses incurred by MCCi until both parties authorize this Order. Sales tax will be invoiced where applicable and is NOT included in the Pricing section. Once payment has been received, no refunds for Recurring Services are available.

MCCi ASSUMPTIONS

TECHNICAL SUPPORT

Clients may contact MCCi support via MCCi's Online Support Center, email (support@mccinnovations.com), or telephone 866-942-0464. Support is available Monday through Friday (excluding major holidays) from 8:00 AM to 5:00 PM local time within the continental United States.

PROFESSIONAL SERVICES

CHANGE ORDER PROCESS

Any deviations from the contract will be documented in a Change Order that Client must execute.

CONFIGURATION ASSISTANCE

Many of MCCi's packages list remote configuration assistance for up to a certain number of days. This is based on total days, not business days.

TRAVEL

MCCi will schedule travel in consecutive days for most engagements unless otherwise stated or agreed upon.

SCHEDULING

All rates are based on normal business hours, Monday through Friday from 8:00 AM to 5:00 PM local time within the continental United States. If scheduling needs to occur after business hours, additional rates may apply.

LIMITED LIABILITY

If the Master Agreement is silent on each party's limited liability, or there exists no master agreement, except for breach of any intellectual property right, or end user terms of use, and/or license agreement, liability is limited to the amount of dollars received by MCCi directly associated with this Order in the twelve (12) months prior to the date of the Claim. If the applicable agreement provides for a limitation of liability, then such limitation applies to the greatest extent allowed.

MCCi also does not warrant any third-party products procured on behalf of Client. If there are any product warranties provided by the manufacturer of the product, any remedy should be requested directly from manufacturer and MCCi has no liability associated therewith.

PRE-EXISTING INTELLECTUAL PROPERTY (IP)

The following products noted below are deemed Pre-existing IP as defined in the Master Agreement and are not considered "Works Made for Hire" and as such all rights, title or interest remains with MCCi. Client shall retain a non-exclusive, royalty-free, world-wide, license to use the product(s) as such product(s) is integrated into the solution purchased from MCCi and for the term of the applicable subscription(s) by Client.

- Laserfiche PowerPack by MCCi
- Laserfiche EnerGov Integration by MCCi
- Laserfiche Neogov Integration by MCCi
- GoFiche Suite for Avante/Rio/Subscription
- Common Web Service API for Laserfiche
- GovBuilt software

CLIENT SOLUTION CUSTOMIZATIONS

Client may also choose to customize their system internally without MCCi's help. MCCi is not responsible for any damage caused by the user's customization of the system not performed by MCCi. MCCi will not be held responsible for correcting any problems that may occur from these customizations. Routine updates as provided by software manufacturers may affect any customizations made by entities other than MCCi. If MCCi's help is required to correct/update any customizations made by any entity other than MCCi, appropriate charges will apply.

CLIENT INFORMATION TECHNOLOGY ASSISTANCE

For MCCi to excel in providing the highest level of service, Client must provide timely access to technical resources. Client must provide adequate technical support for all MCCi installation and support services. If Client does not have "in-house" technical support, it is Client's responsibility to make available the appropriate Information Technology resources/consultant when needed.

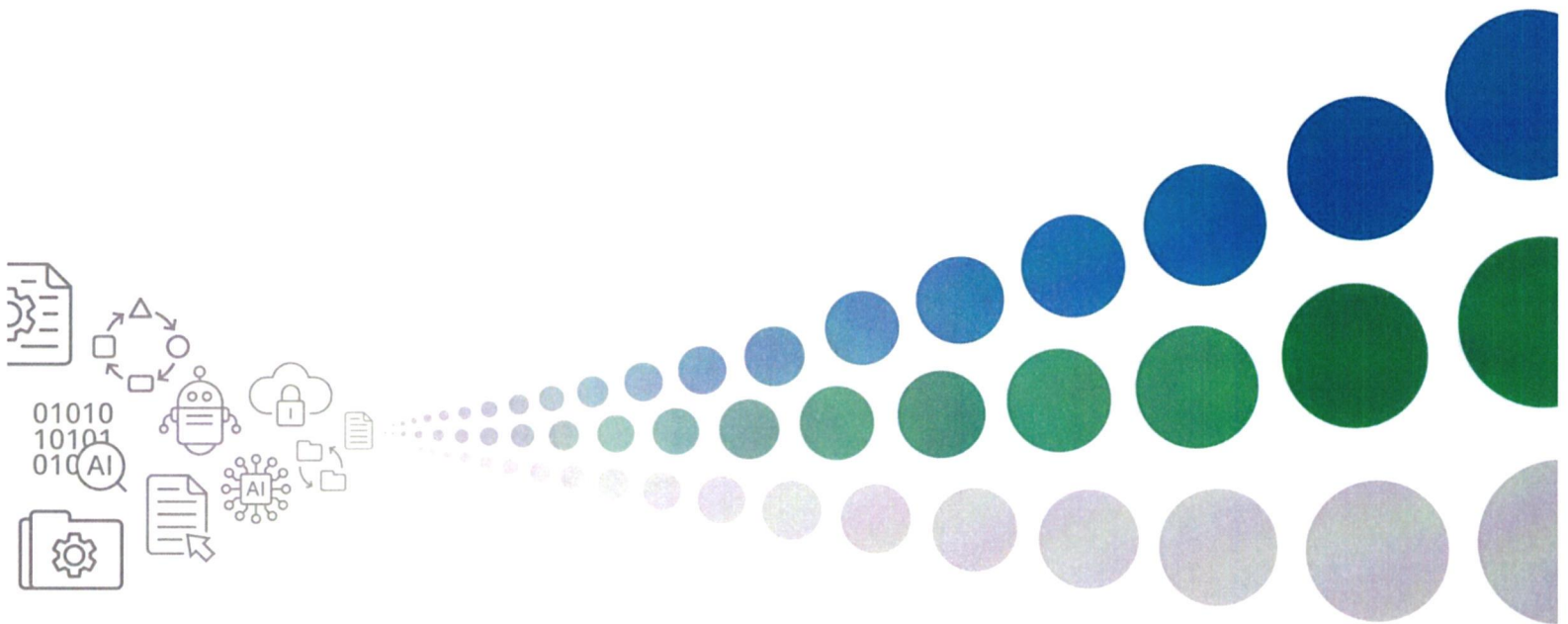


Exhibit A: Statement of Work

Riverside County

County ACR - Trusted Systems Laserfiche Solution Update - AWS to Laserfiche Automated & Retention Process

Issued: March 19, 2026
Valid for 30 days



STATEMENT OF WORK (“SOW”)

This Statement of Work (including appendices hereto, the (“SOW”) is part of Client’s Master Agreement with MCCi (the “Master Agreement”) and will serve as an Exhibit to the Order. If there is any conflict or inconsistency between the provisions of this SOW and the Master Agreement, the provisions of the Master Agreement shall apply unless the discrepancy is specifically called out within this SOW in which case this SOW shall control solely with respect to such conflict or inconsistency. All capitalized terms not otherwise defined herein shall have the meaning ascribed to them in the Master Agreement. In consideration of the foregoing and of the mutual covenants and promises set forth herein, MCCi and Client agree as follows:

BACKGROUND

Client aims to transition from using Laserfiche as a pass-through system for scanning documents to AWS S3, to establishing Laserfiche as the primary trusted document management system. This project involves configuring the existing ACR Laserfiche repository with a new folder structure, implementing a flexible records retention workflow, migrating approximately 544,479 documents from AWS S3 to Laserfiche, importing permanent documents from shared drives, and enabling future document capture. The revised process eliminates exports to Greenroom and aligns the Laserfiche folder structure with existing network shared "Group Folders" (e.g., ACR-RMAP, ACR-ACS).

PROJECT OBJECTIVES

- Project Kickoff and Project Staging
- Project Discovery and Requirements Gathering
- Laserfiche Repository Configuration
- Records Retention Configuration
- Document Import - AWS S3 Documents
- Document Import - Shared Drive Documents
- Configuration of Laserfiche Integration Framework
- ACR Crest TS Workflow Modification
- Laserfiche Form Creation - File Upload Form
- User Security Configuration
- Department Specific Template Configuration
- Alpha Testing and User Acceptance Testing (UAT)
- User Training
- Solution Acceptance & Project Closeout

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PROJECT STAKEHOLDERS

GENERAL INFORMATION

PROJECT NAME	PROJECT MANAGER	MCCi SINGLE POINT OF CONTACT
County ACR - Trusted Systems Laserfiche Solution Update - AWS to Laserfiche Automated & Retention Process	TBD	Debbi Bodewin, CCO (951) 521- 2280 DBodewin@mccinnovations.com

MCCi SOW PREPARATION INFORMATION

NAME	TITLE	EMAIL	PHONE NUMBER
Chad Rodriguez	Chief Technology Officer	crodriguez@mccinnovations.com	850.701.0725
Mike Pazuki	Director of Intelligent Automation	mpazuki@mccinnovations.com	800.342.2633 ext. 1710

CLIENT DECISION MAKER

NAME	TITLE	EMAIL	PHONE NUMBER
Mike Brown	Business Process Manager, ACR	mbrown@asrclkrec.com	951. 840.8308

CLIENT PROJECT STAKEHOLDERS

NAME	TITLE	EMAIL	PHONE NUMBER
Mike Brown	Business Process Manager, ACR	mbrown@asrclkrec.com	951. 840.8308

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MILESTONES & DELIVERABLES

MILESTONE	DELIVERABLES
<p>1. Project Kickoff and Project Staging</p>	<p>MCCi will initiate the project by establishing project governance, confirming scope of services, and preparing the project for execution.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Designate a primary point of contact(s), SME(s), and project stakeholders Participate in the project kickoff meeting Provide implementation constraints, success criteria, and internal communication preferences Provide required access to the applicable Laserfiche environment, source systems, and related project resources needed for project startup Provide timely scheduling coordination and availability for kickoff and project activities <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Coordinate and conduct one (1) remote project kickoff meeting Review project objectives, scope of services, roles, responsibilities, and timeline Create and manage the project plan and project board using MCCi's project management tool Confirm communication, escalation, and scheduling procedures for the duration of the project <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Activities not expressly included in this SOW <p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Client stakeholders required for project startup will be available to participate in the kickoff process
<p>2. Project Discovery and Requirements Gathering</p>	<p>MCCi will complete discovery and requirements gathering activities necessary to define the functional and technical requirements for repository configuration, retention configuration, document import, workflow changes, form creation, security configuration, and department-specific templates.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Participate in discovery sessions and requirements review Provide representative document samples, source structure information, metadata details, and retention schedule information needed for solution design Identify department names, filing expectations, retention needs, user access requirements, and form upload requirements Review and approve documented requirements in a timely manner <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Conduct discovery and requirements gathering sessions to document the intended solution approach Review requirements for repository structure, metadata, retention logic, AWS S3 import, J Drive import, future ingestion, CREST workflow changes, form behavior, templates, and user security Define requirements for alignment to the existing "Group Folders" structure and Active Directory-based access expectations

	<p>Produce a requirements definition summary for use in the subsequent configuration, document imports, and testing milestones</p> <p>EXCLUSIONS Business process reengineering beyond items scoped and documented</p> <p>ASSUPMTIONS Client will provide complete and accurate source information, retention requirements, and access expectations needed to define the solution Any changes to scope will require a change order</p>
<p>3. Laserfiche Repository Configuration</p>	<p>MCCi will configure the existing ACR Laserfiche repository to support long-term trusted-system document storage, aligned folder organization, metadata support, and document retrieval from permanent repository locations.</p> <p>CLIENT DELIVERABLES Provide access to the existing ACR repository and administrative rights needed for repository configuration Confirm the desired folder structure and mirrored “Group Folders” organization Confirm repository storage readiness to support the projected migration volumes Review and approve the configured repository structure</p> <p>MCCI DELIVERABLES Configure the existing ACR Laserfiche repository for long-term document storage Configure a folder structure mirroring the network shared “Group Folders” structure Configure the repository to support imported documents, future ingestion, metadata application, and retrieval Configure the repository in a manner compatible with the existing ACR repository and without requiring migration of CREST workflows or changes to CREST integration pointers Configure repository components needed to support searchability, retrieval, and compliance as part of the overall solution</p> <p>EXCLUSIONS Creation of a new Laserfiche repository Changes to CREST integration pointers as part of repository configuration</p> <p>ASSUPMTIONS The existing ACR Laserfiche repository is sufficient for reconfiguration and long-term use Repository storage will be expanded to support the required document volumes Changes to scope and or implementation services will require a change order</p>
<p>4. Records Retention Configuration</p>	<p>MCCi will configure Laserfiche records retention functionality to support the ACR retention schedule, legal hold handling, automated retention enforcement, and compliance-oriented record management behavior for in-scope documents.</p> <p>CLIENT DELIVERABLES Provide all necessary retention schedule information, retention code definitions, legal hold requirements, and retention mapping expectations Validate the retention rules and expected outcomes for in-scope document types and departments Participate in review of the configured retention behavior</p>

	<p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Configure retention functionality to support 32 unique retention periods and 142 retention codes as outlined in the ACR retention schedule Configure mapping of AWS S3 legal hold and retention tag information to Laserfiche tags or equivalent functionality Configure Laserfiche retention tools to support automated enforcement of retention periods, including review, archive, and deletion actions where applicable Configure the retention solution in a manner that supports auditability and compliance expectations <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Development or redesign of Client retention policy Retention requirements not identified and approved during discovery <p>ASSUPMTIONS</p> <ul style="list-style-type: none"> AWS S3 retention tags can be mapped to Laserfiche tags or equivalent functionality for the in-scope solution Changes and or modifications to scope will require a change order
<p>5. Document Import - AWS S3 Documents</p>	<p>MCCi will migrate the in-scope AWS S3 documents and associated metadata into Laserfiche while preserving original file formats and applying retention based on available S3 metadata tags.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Provide access to the two AWS S3 buckets, related metadata, and required AWS-side coordination Confirm the source scope and import readiness Perform import validation and spot-checking of documents and metadata in Laserfiche Coordinate any post-import S3 retention or purge actions that remain Client-side responsibilities RCIT is responsible for providing data sync to establish drag and drop into LF by MCCI Laserfiche repository storage expansion to at least 2.5TB <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Utilize AWS DataSync for file transfer and Amazon S3 Inventory for object metadata, including retention tags Conduct drag and drop of approximately 544,479 documents from two AWS S3 buckets into Laserfiche Preserve original file types during migration Auto File imported documents into the configured Laserfiche repository structure based on mapping defined during milestone #2 <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Purging or removing data from AWS S3 buckets after migration File type conversion during migration Manual or custom automation to enable retention schedule assignments to documents in non-conformance with established retention configuration in milestone 4 Manually placing indivial files in specific file folder locations in Laserfiche OCR Conversion of files imported

	<p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Retention tags applied will be based on available metadata and retention configuration established in milestone 4. Client will address any desired post-import S3 bucket purging or retention setting adjustments One to one ratio document file to meta data record Mapping of files to designated folder location in LF performed automatically Changes and or modifications to scope will require a change order
<p>6. Document Import – Shared Drive Documents</p>	<p>MCCi will import the in-scope shared drive documents into Laserfiche, organize them within the configured folder structure, and apply metadata and retention-related values as defined in the approved requirements established in milestone #2.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Provide access to the shared Drive content and any relevant retention metadata available for the source files Confirm folder mapping expectations and import scope Participate in validation of imported documents, filing locations, and metadata results Perform reconciliation of file imports Laserfiche repository storage expansion to at least 2.5TB <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Import approximately 908,933 files from the shared drive into Laserfiche Import performed via bulk drag and drop of sub file folder Build and apply filtering logic based on retention metadata, if available; otherwise, process documents as permanent records within the approved scope File imported documents under the mirrored “Group Folders” structure Apply metadata needed for searchability and compliance, including document type, creation date, and retention-related values as defined in the approved requirements Provide document count of files imported <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Cleanup or correction of existing source documents prior to import Perform manual indexing or leveraging data sets to perform indexing File type conversion of source content as part of this import effort MCCi will not perform reconciliation of file import <p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Documents in the shared drive either have usable retention metadata or will be treated as permanent records in accordance with the approved requirements Document name, and folder structure will dictate metadata to be assigned Client will address any desired post-import shared drive document purging or retention settings Changes and or modifications to scope will require a change order
<p>7. Configuration of Laserfiche Integration Framework</p>	<p>MCCi will configure the Laserfiche Integration Framework to support ongoing ingestion of documents from shared drives and other approved sources into the ACR repository.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Provide access to the systems, paths, and infrastructure needed to support LIF configuration

	<p>Confirm source locations and ingestion expectations for future document capture Participate in validation of ingestion behavior</p> <p>MCCI DELIVERABLES</p> <p>Configure the Laserfiche Integration Framework to ingest documents into the ACR repository Configure ingestion to file documents in their permanent folder locations within Laserfiche following the mirrored “Group Folders” structure Configure the ingestion process to apply retention values during ingestion based on the approved requirements Validate the configured ingestion process in the designated test context</p> <p>EXCLUSIONS</p> <p>Custom integration development beyond the scoped LIF configuration Configuration of source systems not expressly identified in this SOW</p> <p>ASSUPMTIONS</p> <p>Required infrastructure and source connectivity needed for LIF configuration will be available to the project team Changes and or modifications to scope will require a change order</p>
<p>8. ACR Crest TS Workflow Modification</p>	<p>MCCi will modify the existing ACR Crest TS workflow to eliminate Greenroom exports, discontinue related cleanup behavior, and support permanent filing within Laserfiche.</p> <p>CLIENT DELIVERABLES</p> <p>Provide access to the existing ACR Crest TS workflow and related environment components Confirm the desired future-state filing behavior and the export and cleanup steps to be retired Participate in review and approval of the modified workflow behavior</p> <p>MCCI DELIVERABLES</p> <p>Disable the workflow process that exports documents to Greenroom or network folders Disable the cleanup process that deletes documents in ACR after export Revise the auto-file workflow to file documents in permanent folder locations within Laserfiche aligned with the “Group Folders” structure Support Active Directory integration for user access via RIVCO accounts as it relates to the updated process</p> <p>EXCLUSIONS</p> <p>Migration of CREST workflows to another repository Changes to CREST integration pointers</p> <p>ASSUPMTIONS</p> <p>Active Directory integration is compatible with RIVCO accounts for the scoped user access changes</p>
<p>9. Laserfiche Form Creation – File Upload Form</p>	<p>MCCi will consult on and create a Laserfiche Form for document uploads that captures department selection and applies the metadata needed to support filing and retention scheduling.</p> <p>CLIENT DELIVERABLES</p> <p>Confirm department list, upload use cases, and desired metadata behavior</p>

	<p>Provide the retention schedule source information and department or retention mapping inputs needed for form design Review and approve the configured form and metadata behavior</p> <p>MCCI DELIVERABLES</p> <p>Create a Laserfiche Form with a dropdown menu populated with the following department names: Assessor, RMAP, Clerk, Recorder, Legal, HR, Accounting, Finance, Admin, Health & Safety, Office Management</p> <p>Configure the form to use the selected department to apply metadata for retention scheduling; document type, retention code, and retention period</p> <p>Integrate the form with the Laserfiche repository to automatically file uploaded documents in the corresponding "Group Folders" structure</p> <p>Configure the form metadata behavior to reference the TS Retention Schedules data source, as prepared by Client, for retention period assignment</p> <p>EXCLUSIONS</p> <p>Additional forms or business processes beyond the scoped file upload form External URL assignment for web-based modules</p> <p>ASSUPMTIONS</p> <p>The TS Retention Schedules source will be made available in a usable form for the scoped metadata reference Retention schedules to be referenced will come from those created in previous milestones</p>
<p>10. User Security Configuration</p>	<p>MCCi will configure repository security to support authorized access and retrieval of documents in alignment with the approved folder structure and department access model.</p> <p>CLIENT DELIVERABLES</p> <p>Define each user and group necessary to access Laserfiche Confirm department-based or role-based access expectations and restrictions for the configured folder structure Participate in review and validation of configured repository access</p> <p>MCCI DELIVERABLES</p> <p>Configure up to three (3) Laserfiche User Groups Set entry access security for up to two folder levels with no more than ten (10) folders in each level, for up to three (3) user groups Configure repository security in support of authorized access to in-scope content within the permanent folder structure Validate security configuration as part of the overall testing effort</p> <p>EXCLUSIONS</p> <p>Configuring automated security Identity provider configuration outside of what is expressly included in this SOW</p> <p>ASSUPMTIONS</p> <p>Client will confirm the defined users and groups form milestone #2, prior to security configuration Changes and or modifications in scope will require a change order</p>
<p>11. Department Specific Template Configuration</p>	<p>MCCi will complete requirements gathering and configure department-specific repository components needed to support document organization, metadata capture, and access for the in-scope department structures. This milestone aligns</p>

	<p>most closely to MCCi's repository configuration package approach for folder structures, templates, user groups, and entry access security.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Verify defined users and groups form Milestone #2 Verify requirements definitions defined in Milestone #2 for defined document types, naming schemes, folder paths, and metadata Provide SME to verify template configuration <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Create up to three (3) folder structures that consist of three (3) tiered levels with no more than ten (10) folders in each level Create up to three (3) Laserfiche templates with up to seven (7) fields each Create up to three (3) Laserfiche User Groups Set entry access security for up to two folder levels with no more than ten (10) folders in each level, for up to three (3) user groups Conduct one (1) remote overview session on the repository configuration built by the MCCi project team Configure the templates to align with the "Group Folders" structure and support retention-related metadata requirements for the in-scope departments <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Configuring business routing logic Restructuring metadata beyond the approved template design Determining Records Management settings Cleaning up existing documents Installing software Configuring workflows <p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Department-specific document management needs for the in-scope templates can be finalized through consultation with ACR stakeholders Changes and or modifications in requirements will require a change order
<p>12. Alpha Testing and User Acceptance Testing (UAT)</p>	<p>MCCi will complete Alpha testing of the configured solution to verify functionality, stability, migration outcomes, retention behavior, filing behavior, workflow changes, form behavior, template behavior, security configuration, and overall compliance with the approved requirements prior to release for Client User Acceptance Testing (UAT). Client will perform UAT to validate the implemented solution against the approved requirements.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Designate a testing team to participate in User Acceptance Testing Execute UAT of the configured solution in the designated test or non-production context Validate repository configuration, imports, retention behavior, workflow revision, form behavior, template behavior, security configuration, and access/retrieval results Document and communicate testing results, defects, and requested in-scope corrections in a timely manner Provide acceptance or deficiency feedback within ten (10) business days of release for testing

	<p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Perform Alpha testing of the configured solution prior to release to Client Perform quality assurance testing to verify configured functionality and deployment stability Validate that metadata, indexing, searchability, retention behavior, and audit-related functionality operate in accordance with the approved requirements Release the configured solution to Client for UAT Address identified in-scope defects necessary to align the solution with the approved requirements Support the UAT period through coordination with Client and review of submitted testing feedback <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Final testing of Client-made changes outside MCCI's delivered configuration Testing of features or scenarios outside the approved project scope <p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Testing will occur in an environment that reasonably reflects the intended production configuration Client testing participants will be available and complete UAT within the allotted review period Changes and or modifications will require a change order
<p>13. User Training</p>	<p>MCCI will provide remote overview training on the configured solution to support Client understanding of the updated repository structure, retention behavior, workflow changes, form usage, and ongoing operational use of the delivered configuration. This training will be one (1) full-day training split into two (2) half-day sessions. The training include ongoing management as well as considerations for future growth, focusing on setting up new security permissions, repository planning, and creation of new metadata types.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Have a license available for each attendee participating in the training Have access point for each attendee (laptop, desktop application, etc.) Provide the requisite IT system access Identify appropriate attendees for the training session Provide attendee availability and scheduling coordination Verify trainees can login to Laserfiche prior to scheduled training <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Provide two (2) training sessions for three (3) hours each Training to include remote overview training on the revised workflow, Laserfiche retention tools, and "Group Folders" structure Review the configured repository, import outcomes, retention behavior, form usage, template usage, and security approach as part of the training session Provide recordings of trainings or meetings if requested in advance Provide Repository Administration training Provide training for up to six (6) users per session <p>EXCLUSIONS</p> <ul style="list-style-type: none"> MCCI is not responsible for customizing training materials for the client Ongoing retraining after completion

	<p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Training will be provided remotely Requested recordings will be available through the Training Center for Laserfiche if requested in advance Attendees have either attended Laserfiche User Training or have requisite prior user experience Onsite training will be scheduled in full-day sessions where applicable Scheduling exceptions can be discussed with your trainer
<p>14. Solution Acceptance & Project Closeout</p>	<p>Client will complete final review and acceptance of the solution. MCCi will conduct project closeout activities and transition Client to MCCi Account Management and Support.</p> <p>CLIENT DELIVERABLES</p> <ul style="list-style-type: none"> Provide formal solution acceptance following successful completion of testing and delivery of the scoped configuration Participate in the project wrap-up call Identify any final in-scope questions or correction items during the transition period <p>MCCI DELIVERABLES</p> <ul style="list-style-type: none"> Conduct a formal project wrap-up call Transition Client to MCCi Account Management and Support Complete project closeout upon conclusion of the acceptance and transition activities <p>EXCLUSIONS</p> <ul style="list-style-type: none"> Ongoing maintenance, support, or enhancement work beyond the scoped closeout activities <p>ASSUPMTIONS</p> <ul style="list-style-type: none"> Deliverable acceptance will follow the acceptance framework defined in this SOW MCCi project team will be available to Client for up to ten (10) business days, not to exceed five (5) hours, to address solution questions, concerns, or future efforts

EXCLUDED

GENERAL

- MCCI is not responsible for assigning an external URL for any web-based platform/software module.
- MCCI is not responsible for creating or maintaining a backup and recovery plans.
- MCCI is not responsible for creating training documentation.
- MCCI is not responsible for final testing including, but not limited to configuration changes made by Client's team prior to system Handoff.
- Except where specifically noted, no custom coding is included; configuration work is restricted to the capabilities associated with the out-of-the-box solution.
- MCCI is not responsible for anything not expressly included in this SOW.

DATA MIGRATION

- MCCI is not responsible for the accuracy of existing indexing data and/or image quality, such as errors on the media, image file corruption, data file corruption, orphaned records, encrypted data, non-supported proprietary formats, or other errors that are not controllable by MCCI.
- Due to the vast differences in how document management systems handle sticky notes, redactions and annotations, data migration services do not include migration of sticky notes or any other redactions and annotations from the legacy system to Laserfiche, unless otherwise stated in this SOW.
- MCCI is not responsible for maintaining a copy of the original data, or a copy of the converted data.
- OCR is not included. Client will be able to OCR the records internally once the migration process is complete.
- Documents from the legacy system will be migrated into Laserfiche. No conversion of data types or removal of document wrappers will be completed during the migration process unless specifically stated in this SOW. Files that are encrypted will not be migrated.

SOW ASSUMPTIONS

The following assumptions serve as the basis for this SOW. Any service or activity not described in this SOW is not included in the Scope of services to be provided. Variations to the following may impact the SOW's cost and/or schedule justifying a Change Order (defined below).

DELIVERABLE ACCEPTANCE CRITERIA

MCCi's completion of a Deliverable to Client shall constitute that MCCi has conducted its own review and believes it meets Client's requirements. Client shall then have the right to conduct its own review of the Deliverable as Client deems necessary. If Client, in its reasonable discretion, determines that any submitted Deliverable does not meet the agreed upon expectations, Client shall have five (5) business days after MCCi's submission to give written notice to MCCi specifying the deficiencies in reasonable detail. MCCi shall use reasonable efforts to promptly resolve any such deficiencies. Upon resolution of any such deficiencies, MCCi shall resubmit the Deliverable for review as set forth above. Notwithstanding the foregoing, if Client fails to reject any Deliverable within five (5) business days, such Deliverable shall be deemed accepted.

GENERAL

- Client agrees that the work schedule described herein represents MCCi's current best estimate and is subject to possible change due to circumstances beyond MCCi's direct control and/or new or additional information discovered during the course of the project. Further, Client understands and acknowledges that MCCi's ability to meet such work schedule is dependent upon, among other things, the accuracy of the assumptions and representations made by Client, the timeliness of Client business decisions, and the performance of Client and Client's vendor personnel in meeting their obligations for this project and in accordance with this SOW.
- If either party identifies a business issue during the project, MCCi and Client must jointly establish a plan to resolve the issues with a potential impact analysis of timeline and budget within five (5) business days of identification.
- Any necessary business decision resulting from the identified business issues must be made by Client within five (5) business days from request.
- Client shall provide MCCi accurate data throughout the requirements gathering process.
- Client is responsible to ensure that adequate hardware/infrastructure is in place and capable of handling the extra resources that may be required to support the Business Process Configuration, related software, etc.
- Any additional software licensing needs related to this service/process configuration have not been considered or included as part of this SOW. Client is responsible for ensuring that the required software licensing is available.
- If the Services require MCCi to access or use any third party software products provided or used, Client warrants that it shall have all rights and licenses of third parties necessary or appropriate for MCCi to access or use such third party products and agrees to produce evidence of such rights and licenses upon the reasonable request of MCCi and to indemnify, hold harmless and defend MCCi from and against any claims, actions, demands, lawsuits, damages, liabilities, settlements, penalties, fines, costs and expenses (including reasonable attorneys' fees) to the extent arising from MCCi's access to or use of such third party products.
- Client will maintain primary contacts and project staff for the duration of the project, as a change in staff may result in a Change Order for time spent by MCCi on retraining, reeducating, or changes in direction.
- Client will ensure that all Client's personnel who may be necessary or appropriate for the successful performance of the Services will, on reasonable notice: (i) be available to assist MCCi' personnel by answering business, technical and operational questions and providing requested documents, guidelines and procedures in a timely manner; (ii) participate in the Services as reasonably necessary for performance under this SOW;

and (iii) be available to assist MCCi with any other activities or tasks required to complete the Services in accordance with this SOW.

- The Post-Implementation Configuration Assistance is intended to incur no more than 10 hours over the 30-day period. This assistance is intended to aid in transitioning Client to MCCi Support.
- **All Services pricing assumes the Client will grant MCCi unattended access** to the required infrastructure for the project. Unattended access requires the following:
 - Either a VPN connection with proper credentials or installation of on-demand remote access software utilized by MCCi.
 - Connections that can be made by an assigned MCCi Project Team without intervention from the Client from the hours of 8:00 AM ET to 8:00 PM ET.
 - A Windows Domain account assigned exclusively to the assigned MCCi Project Team, with passwords provided, that has administrative access to all infrastructure being serviced for purposes of the project.
 - A Windows Domain account, and complete access to that account including the password, for the service account to be used with any installed software products.
 - **Failure to provide this access will result in a Change Order increasing the cost to Client and timeline of the project.**
- Projects enter "On-Hold" status when (i) Client requests a delay in starting a new project, or (ii) Client is unresponsive for more than 15 business days during an active project. On-Hold status will remain until a new project start date is mutually agreed upon, or until Closed. MCCi may elect to Close the project due to project remaining On-Hold for more than 35 business days.
- Projects that are Closed prior to completion, will be billed for any progress made to date and the MCCi project team will no longer be assigned to the project. Billing for progress made to date is based on the number of hours worked or the estimated percentage of the project that has been completed, whichever is greater. Subsequently, a new order is required to restart a Closed project, and to have new MCCi project resources assigned.
- Client will provide a single point of contact responsible for coordinating communications and scheduling amongst Client stakeholders.
- MCCi will conduct a project kickoff call with Client to set objectives and review systems/processes used.
- Google Chrome or Chrome Microsoft Edge is installed on all Laserfiche servers.
- TLS 1.2 is configured on all Laserfiche servers.
- Firewall ports will be opened for and unattended remote access on all necessary servers will be granted to MCCi.
- All services will be performed Monday – Friday, 8 am to 5 pm EST.
- MCCi will only provide recordings of trainings or meetings if requested in advance. Requested recordings will be available through the Training Center for Laserfiche.
- Client will acquire, install, and setup TLS certificates that meet application requirements.
- Purchase of Managed Cloud services may cover some of these assumptions/deliverables.
- Client will ensure previously agreed upon scheduled trainings are attended by their staff. For cancellations or rescheduling, the minimum notice period requirement to avoid penalties is 2 calendar weeks prior to the training date. Penalties: (i) Regardless of the notification time period, if the training was to be in person and MCCi has incurred non-refundable travel expenses, client will reimburse MCCi accordingly, and (ii) If client cancels or reschedules training within 7 calendar days and no less than 48 hours from the training date, the client will forfeit half of the allotted training time, or be assessed a fee equal to 50% of the training package purchased, or (ii) If the client cancels or reschedules the training within 48 hours of the training date, or is a no show on the training date, the training package purchased will be charged in full and forfeited by the client.

GENERAL TESTING DEFINITIONS

- Alpha Testing – Defined as internal acceptance testing performed by the project team prior to releasing the product or configuration to the Client
- Basic Deployment Testing – Defined as testing to ensure that the crucial functions of the system are operating properly, and that the deployment is stable
- Beta Testing – Defined as the testing performed to verify functionality and fulfillment of user requirements
- User Acceptance Testing – Defined as testing performed by the Client's users to verify and accept the implemented functionality or deployment

GENERAL EXCLUSIONS

- MCCi is not responsible for assigning an external URL for any web-based platform/software module.
- MCCi is not responsible for creating or maintaining backups, backup plans or recovery plans.
- MCCi is not responsible for creating training documentation.
- MCCi is not responsible for final testing including, but not limited to, configuration changes made by Client prior to system handoff.
- Except where specifically noted, no custom coding is included; configuration work is restricted to the capabilities associated with the out-of-the-box solution.

LIMITED LIABILITY

If the Master Agreement is silent on each party's limited liability, or there exists no master agreement, except for breach of any intellectual property right, or end user terms of use, and/or license agreement, liability is limited to the amount of dollars received by MCCi directly associated with this Order in the six (6) months prior to the date of the Claim. If the applicable agreement provides for a limitation of liability, then such limitation applies to the greatest extent allowed.

INSTALLATION

- Client shall be responsible for setting up, testing, configuring, and otherwise managing users and user group security, privileges, feature rights, and access rights.
- Client shall provide support for any API-related configurations and integrations being developed by its team or third parties.
- Client shall identify users participating in the business processes and ensure that appropriate user licensing has been acquired/assigned to them based on their role.
- MCCi's technical team will be provided unattended remote access to Client's applicable servers during the duration of the project outlined in this SOW.

DATA MIGRATION

- Migrations will be performed via direct hard-drive to hard-drive or server to server connection for optimal performance results. Migrations performed by any indirect transfer method are anticipated to take significantly longer (speed and duration variation cannot be estimated as part of a Level 1 scoping effort).
- Users will not add new records to the existing system once migrations commence.
- Users will not work with existing records in the existing system once migrations commence.
- Records to be migrated during the execution of differential migration(s), if included in this SOW, will be made available and immediately identifiable by Client's development team and project teams. It is assumed that an extraction query for the identified modify date will be available for use by MCCi's development team to execute migration efforts in the same manner as the original full data migration(s).

- Integrations designed to display records (including public records) may not be functional or fully available during the process of the full data migration effort, as records will exist in only one of two systems at full capacity until all migration efforts are completed and validated.
- Data migrations will not include any custom software development.
- Security design and implementation is subject to full data accessibility between the Laserfiche system and desired active directory (AD) groups and administration, as well as other network infrastructure limitations and capabilities.
- Client will provide necessary hardware to store/process migration data.
- If indexing is desired and not currently contained within the electronic data migrated, Client is required to provide MCCi with a database (in a format accepted by MCCi and approved in this scope) of indexing information which would be used to auto populate template fields. Additionally, the index data must be associated with the documents via unique identifiers or pointers.
- Due to the vast differences in how document management systems handle security and file access, the migrated data will not retain any of the previous system security from the former document management system. Client is responsible for applying the necessary security and access control to the migrated data in Laserfiche. Prior to providing end user access, Client is responsible to verify that all migrated data has had the proper security applied, including view/write access and redactions (if utilized), which is consistent with Client's existing Laserfiche security policy.
- After completion of the project, MCCi will purge all data and records received and hosted associated with migration services outlined in this SOW.

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ROLES & RESPONSIBILITIES

PROJECT MANAGER

Responsible for planning, organizing, managing, controlling, and facilitating communicating all phases of the project. Will work with project resources to ensure accurate scoping and timely delivery of project.

SYSTEM ENGINEER

Responsible for integrating project technical aspects and making information relatable to non-technical personnel. Will work through each phase of the given system and process, from plan along with expansion to validation and operation, on measurable risk assessment, regularly concentrating on performance, testing, scheduling, and budgets.

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BILLING SCHEDULE

FIXED FEE BILLING SCHEDULE

MCCi will bill Client based on the schedule defined below and will bill for actual out of pocket expenses incurred on a monthly basis.

Billing Schedule	Invoice Amount
Kick Off	\$3,960.00
Progress Bill 1	\$9,900.00
Progress Bill 2	\$9,900.00
Progress Bill 3	\$9,900.00
Project Close - Final Acceptance	\$5,940.00
Total:	\$39,600.00

MCCi will initiate the first billing upon completion of the Project Kickoff. Incremental billing will be done based on the project's completion progress reaching 25% (Progress Bill 1), 50% (Progress Bill 2), and 75% (Progress Bill 3) respectively. Any pending billing will be invoiced upon completion of the SOW.

If either the Client or MCCi cancels any or all services in accordance with the Master Agreement, MCCi may invoice Client for a pro-rated share of the uncompleted work/milestone(s) for services actually performed through the effective date of such termination.

PROCESS & ESCALATION

CHANGE ORDER PROCESS

A Change Order is defined as a modification to the original contract price to complete Deliverables outlined in the SOW or a revised SOW to describe work required to fulfil the SOW. As this project progresses, it may be necessary to amend this SOW. Client understands that any change to this initial SOW will affect the fee and may extend the project completion date. If changes are required, Client will send a written request to MCCi outlining the requested change(s). MCCi will assess the change(s) and provide Client with a formal Change Order request. This Change Order will include the details of the scope change, as well as any additional cost that may be necessary in order to implement the same. It may be necessary to halt work on this project while Client reviews the Change Order request. After reviewing and approving the Change Order request, Client must return a signed copy to MCCi before work may proceed on the project.

ISSUE ESCALATION

Client may use the following contact information for resolution and escalation of any unresolved issues and tasks. MCCi will acknowledge escalations in writing and include steps toward resolution.

NAME	RESPONSIBILITY/ROLE	CONTACT NUMBER	EMAIL
Victor D'Aurio	Chief Operating Officer	850-701-0725 ext. 1604	victor@mccinnovations.com

APPENDIX A: ASSESSOR FILES

Type	Code	Document Date	Length	Description	Detail	Copy of Records	Official Record Retention	Citation / Rationale	Final Disposition	Schedule #
DRRS	ACR-A-100	Due	+5	Annual Racehorse Tax Return	Identifies racehorses subject to the in-lieu tax.	Business Personal Property	Five years from the date the returns became due.	18 CCR 1045	Shred / Delete	DRRS_ACR-A_2023_Rev06
DRRS	ACR-A-125	Scanned P	+500	Appraisal Records	Used to determine a value for taxable property in the County. Information includes parcel number, name of owner, and description of property.	Valuation Divisions	P	Best Practice	County Archives	DRRS_ACR-A_2023_Rev06
DRRS	ACR-A-150	Final	+5	Assessment Appeals	Evidence to support the property's assessed value. May include other documentation which is presented to the Review Board to establish the taxable value of the property.	Assessment Services	When five years have elapsed since the final action on the application.	GOV 25105.5	Shred / Delete	DRRS_ACR-A_2023_Rev06
DRRS	ACR-A-175	Scanned P	+500	Assessment Rolls / Accumulated Journals / Parcel Number Change List	List(s) of the assessed values for all property in the county. Includes situs roll, name roll, exempt roll and subdivision roll. Also includes assessment and parcel maintenance activity.	Assessment Services	P	Best Practice	County Archives	DRRS_ACR-A_2023_Rev06
DRRS	ACR-A-200	Lien YR	+25	Business Property Records	Used to locate all taxable property in the county, to identify the owners, describe the property and determine a value. May include mandatory and non-mandatory audit reports and work papers that verify	Business Personal Property	25 years after the lien date of the tax year for which the documentation pertains.	RTC 465(a); RTC 834	Shred / Delete	DRRS_ACR-A_2023_Rev06

					the accuracy of the information provided by the taxpayer.					
DRR S	ACR- A-225	Lien YR	+6	PCOR and 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	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-250	Scanned P	+500	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	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-275	FY	+2	Change of Mailing Address	Taxpayer requesting a change of address for the mailing of the property tax bill.	Assessm ent Services	2 fiscal years from the receipt date of the request.	GOV 26202	Shred / Delete	DRRS_ACR- A_2023_Rev06

DRR S	ACR- A-300	Lien YR	+6	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	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-325	Lien YR	+6	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	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-350	Lien YR	+6	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	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-375	Lien YR	+6	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	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-400	Scanned P	+500	Assessor Maps	Assessor maps: Assessment illustrations to define physical location and size.	Mapping	P	Best Practice	County Archives	DRRS_ACR- A_2023_Rev06

					For assessment purposes only.					
DRR S	ACR- A-425	Scanned P	+500	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).	Manufac tured Homes	P	Best Practice	County Archives	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-450	Lien YR	+6	Manufactured Home Building Records	Records describing the assessment and value information manufactured homes. Includes cost worksheets, plans and dealer reports/invoices.	Manufac tured Homes	Six years after the lien date of the tax year for which the documentation pertains.	RTC 465(a)	Shred / Delete	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-475	Lien YR	+6	Separate Valuations	A separation of values to a parcel(s) that is split or combined into several or one parcel(s), respectively.	Assessm ent Services	Six years after the lien date of the tax year for which the documentation pertains.	RTC 465(a)	Shred / Delete	DRRS_ACR- A_2023_Rev06
DRR S	ACR- A-500	Scanned P	+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	DRRS_ACR- A_2023_Rev06

DRR S	ACR- A-525	FY	+9	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	DRRS_ACR-A_2023_Rev06
DRR S	ACR- A-550	Lien YR	+6	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	DRRS_ACR-A_2023_Rev06
DRR S	ACR- A-575	Lien YR	+25	Wind Files	Used to determine a value for taxable property in the County. Information includes parcel number, legal party owner(s) and description of property. Additional information includes evidence to support/track assessed value in the form of business property records and/or documentation presented to the Review Board.	Business Personal Property	25 years after the lien date of the tax year for which the documentation pertains.	RTC 465(a); RTC 834	Shred / Delete	DRRS_ACR-A_2023_Rev06

APPENDIX B: RMAP Files

Type	Code	Document Date	Length	Description	Detail	Copy of Records	Official Record Retention	Citation / Rationale	Final Disposition	Schedule #
DRR S	RMAP-100	Scanned Date	CL + 2	Account Services	Records related to customer accounts. Records series may include Records Transfer lists, New Customer form, RS-Web registrations, etc. These records contain obsolete information.	RMAP	CL + 2	GOV 26202; Audit Support; Best Practice	Shred / Delete	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP-140	Scanned P	P	Archives Program History	Archives-generated records identified by archival staff containing enduring value that contributes to the understanding of the history and government of the County of Riverside.	RMAP	P	Best Practice	County Archives	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP-150	Scanned P	P	Archive Accessions	Documents that meet the historical requirement for Archival transfer. Includes Request for Records Transfer form, Agreement to Transfer Records form. May include authorized signatures and correspondence.	RMAP	P	GOV 26205.7; BOS Policy A-43; Best Practice	County Archives	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP-250	Closed	CL + 7	Financial Reports	Reports produced to monitor spending, performance measures and other operations that reflect the financial stability of the RMAP program. Records series may include approved budget, rate analysis, correspondence, reports, spreadsheets, and business invoices, reports and	RMAP	CL + 7	Best Practice	Dept.	DRRS_ACR-RMAP_2025_REV05

					revenue for discontinued processes.					
DRR S	RMAP- 350	Closed	CL + 25	Records Management Program History	Records Management related documents initiated or undertaken by the program that contribute to the long-term understanding of the role it has played within the County.	RMAP	CL + 25	Best Practice	Dept.	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP- 400	Closed	CL + 2	Project Files	Records related to projects initiated or undertaken that do not contribute to the long-term understanding or history of the program. Includes Trusted System review forms and correspondence.	RMAP	CL + 2	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP- 550	Calendar Year	CY + 2	Surveys	Customer surveys used to determine whether or not RMAP is meeting current needs.	RMAP	CY + 2	GOV 26202	Shred / Delete	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP- 600	Closed	CL + 5	Training Program - County	Documentation of countywide training provided by RMAP staff including regular RMAP Meetings and workshops. Records series may include pertinent handouts, PowerPoint slides, agendas, sign-in sheets and speaker notes.	RMAP	CL + 5	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP- 650	Revision	REV + 1	Authorized Signature List	Records Management Forms 691 which document the administration, coordinators	RMAP	REV + 1	GOV 26202;	Shred / Delete	DRRS_ACR-RMAP_2025_REV05

					and approvers for County Departments.			Best Practice		
DRR S	RMAP- 675	Closed	CL + 1	ACR Internal Retrieval, Refile & Transfer Forms	Internal ACR forms and related documentation used to request the transfer, retrieval, and refile of records with any storage vendor. Includes tracking spreadsheets, reports, and other records used to monitor and document these transactions.	RMAP	CL + 1	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-RMAP_2025_REV05
DRR S	RMAP- 700	Closed	CL + 10	Litigation Hold and Retention Extension Records	Includes Records Management Form 785 and any supporting documentation related to requests for extending the retention period of records due to litigation, audit holds, or other legal requirements.	RMAP	CL + 10	CCP 1952.3; Best Practice	Shred / Delete	DRRS_ACR-RMAP_2025_REV05

APPENDIX C: Recorder Files

Type	Code	Document Date	Length	Description	Detail	Copy of Records	Official Record Retention	Citation / Rationale	Final Disposition	Schedule #
DRRS	ACR-R0010	Destruction Date	Destroyed	Archive Writer Audit Sheet	Form used for each microfilm roll during the quality control process to document findings.	Recorder	Destroy when appropriate microfilm is destroyed.	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0020	CY	+3	Attorney Service Drop Off Sheets	Customer forms completed when dropping off documents to be recorded. Form contains information such as customer name, special recording instruction and amount and type of documents.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0030	Scanned P	+500	Audit of Master Microfilm Storage Facility	Annual audit of master microfilm and storage facility conditions including temperature readings and oxidation inspections. Audits performed on the same samples to establish benchmarks.	Recorder	P	Best Practice	Dept.	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0040	CY	+3	Customer Comment Cards	Forms completed by customer's of the Assessor-Clerk-Recorder's office where customers comment on the services provided to them. Customers rate customer service and provide suggestions for improvement of the	Assessor-County Clerk - Recorder	CY + 3	GOV 26202; Dept. Policy; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06

					services provided by the Assessor-Clerk-Recorder.					
DRRS	ACR-R0050	CY	+2	Documents Undeliverable by Mail and Uncalled for	Original documents left with and recorded, microfilmed, and electronically saved by the County Recorder which are undeliverable by mail and uncalled for.	Recorder	CY + 2	GOV 26205.6 (b); Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0055	P	+500	Indexing Procedures	Documentation regarding the history of changes made to the vital and official record indexing rules such as changes to document title codes and formatting of grantor / grantee names, etc.	Recorder	P	GOV 27320-27336; GOV 26205.5; Best Practice	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0060	CY	+3	Map Checklists	Quality control checklists of items that a map must contain in order to be recorded. Used to review evidence of decision made in the recording process.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0070	CY	+3	Marriage Correspondence	Correspondence to couple and/or to person solemnizing marriage notifying them of errors in license that prevents it from being recorded and what action must be taken to correct it.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06

					Letters include the names of couple, license number and reason for the letter.					
DRRS	ACR-R0080	Scanned P	+500	Methylene Blue Tests	Results of outside testing certifying that film processing results with respect to fixer functions fall within the standards dictated by ANSI IT9.17-1993. Certificates record the range of methylene blue present on the film, the date the film was processed and the film roll from which it came. [NOTE:Process obsolete as of 11/30/2016.]	Recorder	P	Best Practice	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0090	Scanned Date	+3	Preliminary 20-Day Notice Match List	Records documenting the date, legal description and preliminary number filed in the Recorder's Office. Provides Indexing section with a list of people who have filed Preliminary 20-day notices informing them of who they need to contact.	Recorder	Filing Date + 3	CIV 8214; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0100	Scanned P	+500	Reports	Administrative reports detailing information such as the number of documents recorded, fee breakdown, etc. Updated and printed daily. Used	Recorder	P	Dept. Policy; Best Practice	Dept.	DRRS_ACR-R_2025_Rev06

					for internal quality control and reference.					
DRRS	ACR-R0110	CY	+3	Studies and Statistics	Record of departments activities and accomplishments. They may include statistics, narrative reports, graphs and diagrams.	Assessor-County Clerk - Recorder	CY + 3	GOV 26202; CalRIM; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0120	CY	+3	Target Sheets	Record of fees for cashiering when recording a Record of Survey or Assessment Diagram.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0130	CY	+3	Affidavit for Duplicate Marriage License	Issued when a license is not recordable due to whiteouts, stains, crossed out information, and other alterations, or when informed that the original license was lost. An affidavit must be signed and returned before a duplicate marriage license can be issued.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0140	CY	+3	Application for a Certified Copy of a Military Discharge (DD214)	Applications for a certified copy of recorded military discharge.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0150	CY	+3	Application for Copy of Official Records	A request for copies of official records. Includes: document numbers requested, customer's name and address.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0160	CY	+3	Application for a Search or Certified Copy of a Birth Certificate	A request for a search or a certified copy of a birth certificate on file in the Riverside County Recorder's office. Includes: name and address of requester, name on certificate and date of event. Attachments may also include Certificate of No Record.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0170	CY	+3	Application for a Search or Certified Copy of a Death Certificate	A request for a search or a certified copy of a death certificate on file in the Riverside County Recorder's office. Includes: name and address of requester, name on certificate and date of event. Attachments may also include Certificate of No Record.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0180	CY	+3	Application for a Search or Certified Copy of a Marriage Certificate	A request for a search or a certified copy of a marriage certificate on file in the Riverside County Recorder's office. Includes: name and address of requester, name on certificate and date of event. Attachments may also include Certificate of No Record.	Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0190	Scanned Date	+7	Delinquent Tax List	Copy of publication and affidavit filed by the tax collector. Affidavit is published to show that the real property on which taxes, assessments, penalties and costs had not been fully paid are in default, together with a list of all real property and supporting documentation.	Recorder	Filing Date + 7	RTC 3371-3374; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0200	Filing date + 5, unless notified in writing to retain them by someone claiming some interest under the contract or in the property affected.	+5	Plans, Contracts & Specifications	Plans, contracts and specifications under which the work or improvement of any building was performed. Records series includes supporting documentation.	Recorder	Filing Date + 5, unless notified in writing to retain them by someone claiming some interest under the contract or in the property affected	GOV 27205; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0210	Scanned Date	+3	Preliminary 20-Day Notice	A written notice from a claimant that is given prior to the recording of a mechanic's lien, prior to filing a stop notice and prior to asserting a claim against a payment bond. Includes: general description of labor, name and address of the person furnishing that labor, name of the person who contracted	Recorder	Filing Date + 3	CIV 8214; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06

					for purchase of that labor and the description of the job site. Records series includes supporting documentation.					
DRRS	ACR-R0211	CY	+7	Documentary Transfer Tax Affidavit	Form used to disclose amount of Documentary Transfer Tax due or to disclose the exemption reason if claiming that Documentary Transfer Tax does not apply.	Recorder	CY + 7	RTC 11932; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0776	Scanned P	+500	Notice of Declared Documentary Transfer Tax	The notice is used to declare Documentary Transfer Tax on unrecorded contracts that include real property.	Recorder	P	Best Practice	Dept.	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0777	CY	+6	Declared Documentary Transfer Tax Supporting Documentation	The supporting documentation for the notice used to declare Documentary Transfer Tax on unrecorded contracts that include real property.	Recorder	CY + 6	Best Practice	Dept.	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0220	CY	+2	Vital Correction Logs	Working files on incoming birth, death and marriage corrections. Includes: date and Local Registration Number or book and page number.	Recorder	CY + 2	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0240	Scanned Date	+100	Bank Note Paper Logs	Logs for tracking the storage and use of bank note paper which is used to print birth, death, and / or marriage certificates.	Recorder	Last Entry + 100	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0270	Scanned Date	+3	Map Logs	Spreadsheets completed by 1) the customer dropping off a map and 2) Recorder staff ensuring that each map is recorded in the correct order. Logs are updated with every recordation.	Recorder	Last entry + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0280	Scanned P	+500	Map Log Books	Log of recorded official maps. Separated in books by type of map - tract, parcel, assessment, record of survey and condominium plan (1947 to present). Includes: map book and page number, name of the city or unincorporated area the property on the map is located in, the document number assigned to the map once recorded, the name of who submitted the map for recording, the fees for recording the map and the time the map was recorded.	Recorder	P	Dept. Policy; Best Practice	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0290	Scanned P	+500	Metadata Logs - Permanent Records Only	Captures and records metadata information for each permanent electronic record image produced and submitted to the Recorder's image	Recorder	P	Best Practice	Dept.	DRRS_ACR-R_2025_Rev06

					database. Metadata is not embedded in the images produced.					
DRRS	ACR-R0300	CY	+3	Production / Assignment Logs	Record of an employee's work rate and assigned duties. May include standards to be met and success rate.	Assessor-County Clerk - Recorder	CY + 3	GOV 26202; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0310	Scanned P	+500	Abstract of Mortgage	Records of mortgages (1893-1897), includes indexes, names of borrowers and lenders, dates of documents and description of property. Arranged chronologically (handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0320	Scanned P	+500	Abstract of Sales Made State to State	An abridgement as an abbreviated form or a summary of sales made state to state (handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0330	Scanned P	+500	Assignments of Mortgages	Recorded transfers of real property encumbrances from old to new holders (1893-1930). Includes: index, date of assignment, names of assignor and assignee, location and description of property and date of recording combined with mortgages then recorded in official records after 1930. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0340	Scanned P	+500	Bank Assets	Statements of banks financial condition (1893-	Recorder	P	GOV 27320 - 27336;	Dept	DRRS_ACR-R_2025_Rev06

					1894). Includes: index, names of banks, sworn statements of financial condition. Arranged chronologically. (Handwritten records)			GOV 26205.5; GOV 26205.7		
DRRS	ACR-R0350	Scanned P	+500	Bank Stocks	Statement of the paid up capitol stock of banks (1893-1894). Includes: index, names of banks, date of statement. Arranged chronologically. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0360	Scanned P	+500	Candidates, Receipts and Expenditures	Candidates affidavit of receipts and expenditures for primary election (1926- 1932). (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0370	Scanned P	+500	Certificate of Sales	Records of sales by Sheriff on foreclosures (1893-1930). Includes: index, name of property owner, value, date of tax due, date of sale and property description. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0380	Scanned P	+500	Certificates of Residence	Index includes name, residence, place where summons may be served and date (1893-1930). Arranged alphabetically by name. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0390	Scanned P	+500	Certificates of Revivor	Index to records showing the revival of a suit which is abated by the death or marriage of any of the parties. Also know as a bill of revivor. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0400	Scanned P	+500	Chattel Mortgages	Records of loans secured by personal property (1893-1930). Includes: index, borrower's and lender's names, date of loan, amount of loan, description of property. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0410	Scanned P	+500	City Charters	A legal document establishing a city. Charters are adopted by cities where special conditions create needs that can't be adequately met by the general laws. A city can adopt a charter and tailor it's organization and elective offices to provide for unique local conditions and needs. A charter can only be adopted and/or changed by a majority vote of city residents-not by a vote of the city council. (July, 1999 - Current). The Secretary of State holds the official record.	Recorder	P	GOV 34460; Best Practice	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0420	Scanned P	+500	Co Partnerships	Agreements of Co-Partnership (1893-1930). Includes: index, agreements, names of partners, firm and date of record. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0430	Scanned P	+500	Declarations of Homestead	Records of persons claiming homesteads (1893-1930). Includes: indexes, names of homesteaders, descriptions of property. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0440	Scanned P	+500	Decrees of Distribution	Record of probate court for the distribution of the estates of deceased persons (1893-1930). Includes: index, names of decedent, administrator, distributes and description of estate. Arranged chronologically. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0450	Scanned P	+500	Deeds	Records transferring title to real property (1893-1930). Includes: indexes, nature and terms of document, description and location of property, names of grantor and grantee. Recorded in official records after 1930.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0460	Scanned P	+500	Federal Tax Liens	Index to tax liens (1923-1967). Includes: index, file number, name of taxpayer, address, amount due, date of notice and demand.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0470	Scanned P	+500	General Index	Index (1893-Current) to official records and to separate volumes of instruments that exist prior to the consolidation of the Recorder's documents into the official records in 1930. Includes: Recorder's number, title of instrument, names of grantee and grantor, reference to volume and page numbers in official records and date recorded. Combined general indexes, granters-grantees after 1975. Grantee-a person who acquires an interest in land by deed, grant or other written instrument, commonly referred to as the buyer. Granter-one who grants property or property rights, commonly referred to as the seller. Records series includes supporting documentation.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0480	Scanned P	+500	Leases	Leases of real property (1893-1930). Includes: index, date and number of document, names of lessor and lessee, date of recording, and reference to volume and page number in records. Supplanted by general indexes in 1931.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0490	Scanned P	+500	Licensed Surveyors	Register of civil engineers and surveyors. Includes: index, names, date issued, town and license number. Arranged alphabetically by name. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0500	Scanned P	+500	Lis Pendens	Evidence a pending court action concerning or affecting the title or the right of possession of real property. Includes: names of plaintiff(s) and defendant(s) as grantor and grantee, date of notice, purpose of action, location and description of property, date recorded, signature of attorney for plaintiff, case number, name of court or certified by a judge or clerk of the court. Also known as Notice of Pendency of Action.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0510	Scanned P	+500	Mechanics Liens	Records of transcripts of mechanics' and	Recorder	P	GOV 27320 - 27336;	Dept	DRRS_ACR-R_2025_Rev06

					contractors' claims filed as statutory liens on property to secure payment of debt for material or labor used thereon (1893-1930). Includes: index, name of plaintiff, name of defendant, statement of claimant's demand (dollar amount), statement of labor, recording date and time, book and page numbers. Arranged chronologically.			GOV 26205.5		
DRRS	ACR-R0520	Scanned P	+500	Military Discharge	Recorded copies of honorable discharges from the United States Armed Forces. May include: name of soldier, serial number, grade, branch of service, organization, date and place of birth, race, marital status, and civilian occupation. Information on military history may include: date of induction / enlistment, date entered into active service, place entered service, selective service date, military occupation, military qualification and date, battle campaigns, decorations and citations, wounds, immunization record, service outside United	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

					States, prior service, reason for separation, service schools attended, education pay date, insurance information, signature of soldier, signature of personnel officer and thumbprint.					
DRRS	ACR-R0530	Scanned P	+500	Mining Claims	Handwritten locations of Cinnabar, Quartz, Magnesite, and other mining claims (1896-1930). Includes: index, date of claim. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0540	Scanned P	+500	Miscellaneous Records	Various documents not required by law to be kept in separate volumes (1893-1930). Includes: handwritten index, names of parties and documents such as: declaration of trust, military discharges, enlistment records, bills of sale, wine certificates, candidates statements, affidavits, agreements, completions and	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

					decrees. Arranged chronologically.					
DRRS	ACR-R0550	Scanned P	+500	Mortgages	Records by which real property is pledged as security of the repayment of an obligation (1893-1930). Includes: names of mortgagor and mortgagee, date, amount, and terms of mortgage, date recorded, location and description of property and signature of mortgagor. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0560	Scanned P	+500	Notices of Attachments	Records of notices of a party being served with a writ of attachment of specific property being attached and held as security in the event a judgment is rendered (1893-1930). Includes: date of notice, names of plaintiff and defendant, amount and reason of attachment, location and description of real property. Recorded in official records after	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

					1930. Arranged chronologically.					
DRRS	ACR-R0570	Scanned P	+500	Official Bonds	Surety bonds posted by public officials. Includes: index, name of official position, sum of bond and date of bond. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0580	Scanned P	+500	Official Maps	Maps which show subdivision or boundaries in Riverside County. Includes: index, parcel, tract, record of survey annexations, assessments, highway and agricultural maps. Shows boundaries, owners, easements and divisions. Arranged chronologically. Records series includes supporting documentation.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0590	Scanned P	+500	Official Records	Recorded instruments previously kept in separate volumes, but combined since 1931. Includes: deeds, mortgages, liens, and other documents dealing with real property. Arranged chronologically. Records series includes	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

					supporting documentation.					
DRRS	ACR-R0600	Scanned P	+500	Patents (Land Patents)	Recorded land grants authorized by Federal and State Land Office, granting transfer of title of real property (1893-1930). Includes: handwritten index, name of grantee, location and description of land, amount of fees due, date recorded, proof of claim, and map of property. Arranged chronologically. Also known as Land Patents.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0610	Scanned P	+500	Powers of Attorney	Recorded copy of authority given to individuals to be Attorney in Fact (1893-1930). Includes: index, name of parties, date and description of powers. Arranged chronologically.	Recorder	P	GOV 27320-27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0620	Scanned P	+500	Pre Emptions	Records of rights given to settlers upon the public lands of the United States to purchase lands at a limited price in preference to others. Includes: index,	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

					modernly equivalent to a first refusal of right.					
DRRS	ACR-R0630	Scanned P	+500	Separate Property of Married Women	Recorded declarations of married women of separate ownership of property. Includes: index, description of property and livestock. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0640	Scanned P	+500	Sole Traders	Records of married women that engage in business on their own account. Includes: index, name of applicant, type of business, name of court. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0650	Scanned P	+500	Stray and Lost Property	Records contain descriptions of lost animals with notices to come forward and claim. Includes: description of property, value, brand and ear mark, date found, etc. Arranged chronologically. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0660	Scanned P	+500	Sub Guarantees	Statements signed and acknowledged by all parties having any record title interest in the real property consenting to the preparation and	Recorder	P	Best Practice	Dept	DRRS_ACR-R_2025_Rev06

					recordation of a parcel map. The document is required to be submitted with parcel and tract maps.					
DRRS	ACR-R0670	Scanned P	+500	Tax Deeds	Records of deeds issued to a purchaser following a sale necessitated by the non payment of real property taxes. Includes: index, tax year, amount of tax, property owner, description and amended tax deed. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0680	Scanned P	+500	Tax Sales	Records of property sold to the State of California for non payment of State and County taxes. Includes: tax year, description of property. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0690	Scanned P	+500	Torrens	A system of title recordation provided by provincial law; it is a system for the registration of land title, indicating the State of the title, including ownership and encumbrances. (Handwritten records)	Recorder	P	GOV 27320 - 27336; GOV 26205.5; GOV 26205.7	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0700	Scanned P	+500	Transcripts of Judgments	Recorded transcripts of civil judgments from district, county, or superior court in cases involving property (1893-1930). Includes: index, date, nature, amount of judgment, case number, name of court, names of plaintiff and defendant, location and description of property, name of judge and date recorded. Recorded in official records after 1930. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0710	Scanned P	+500	Uniform Commercial Code Financing Statements	Original papers recording liens on personal property under the Uniform Commercial Code. These replaced chattel mortgages. Includes: index, file number, debtor's name and address, secured party, filing date, time, number and officer, types of property covered, signature of party and signature of clerk.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0715	CY	+10	Unrecordable Document Notice	A copy of a notice mailed or given to customers who have presented an unrecordable document for recording. The notice informs them that their document has been deemed unrecordable and advises them that it is a public offense to further attempt to record the document. May include a copy of the unrecordable document. Form number ACR 311.	Recorder	CY + 10	GOV 27203; GOV 27204; CCP 315; CCP 338; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0720	Scanned P	+500	Water Claims	Records of rights to the use and/or control of water, whether for irrigation, hydro electric power, or personal use. Includes index.	Recorder	P	GOV 27320 - 27336; GOV 26205.5	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0730	Scanned P	+500	Wills	Recorded wills of deceased persons (1893-1955). Includes: index, names of testator and beneficiaries, date and number of will, nature and amount of bequests, date admitted to probate court, name of executor, date recorded, and signature of testator.	Recorder	P	GOV 27320 - 27336; GOV 26205 5	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0740	Scanned P	+500	Births - 1893-1905	Register of all births occurring in Riverside County from 1893 to 1905. Includes: indexes, birth certificates, handwritten entries of births, delayed birth certificates, amendments, names of children, date of event and sex of child. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5; HSC 102235	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0741	Scanned P	+500	Births - 1906 - Present	Register of all births occurring in Riverside County from 1906 to the present time. Includes: indexes, birth certificates, handwritten entries of births, delayed birth certificates, amendments, names of children, date of event and sex of child. Arranged chronologically.	California State DEPT of Health	P	Best Practice	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0750	Scanned P	+500	Deaths - 1893-1905	Register of all deaths occurring in Riverside County from 1893 to 1905. Includes: indexes, death certificates, delayed death certificates, amendments, name of decedent, date of death. Arranged chronologically.	Recorder	P	GOV 27320 - 27336; GOV 26205.5; HSC 102235	Dept	DRRS_ACR-R_2025_Rev06

DRRS	ACR-R0751	Scanned P	+500	Deaths - 1906 - Present	Register of all deaths occurring in Riverside County from 1906 to the present time. Includes: indexes, death certificates, delayed death certificates, amendments, name of decedent, date of death. Arranged chronologically.	California State Dept. of Health	P	Best Practice	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0760	CY	+3	Expired Marriage License	Correspondence mailed to the applicants informing them of their license expiration date and to contact the County Clerk Office in the county of residence for a Declared Marriage License.	Recorder	CY + 3	GOV 26202; CCP 338; FAM 357-360; Best Practice	Shred / Delete	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0770	Scanned P	+500	Marriages - 1893-1905	Register of all marriages where the license was issued in Riverside County from 1893 to 1905. Includes: index, certificate of marriage, amendments, name of bride and groom, and date. Arranged chronologically by date of marriage.	Recorder	P	GOV 27320 - 27336; GOV 26205.5; HSC 102235	Dept	DRRS_ACR-R_2025_Rev06
DRRS	ACR-R0771	Scanned P	+500	Marriages - 1906 - present	Register of all marriages where the license was issued in Riverside County from 1906 to the present time. Includes: index, certificate of marriage, amendments, name of bride and	California State Dept. of Health	P	Best Practice	Dept	DRRS_ACR-R_2025_Rev06

					groom, and date. Arranged chronologically by date of marriage.					
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APPENDIX D: Clerk Files

Type	Code	Document Date	Length	Description	Detail	Copy of Records	Official Record Retention	Citation / Rationale	Final Disposition	Schedule #
DRRS	ACR-C-100	CY	+3	Bonds & Surety Companies, List of	The Department of Insurance issues an annual list of registered Bond & Surety companies that is filed with clerk by date. Financial Statements; Annual financial statements of admitted sureties in California, on file with clerk by date. Power of Attorney, Appointment of/Power of Attorney Revocation; Surety company employee powers. Includes copies of power of attorney/ revocation of power of attorney. On file with clerk by date. Bail Bond insurance issuance / Revocation; Bail licenses issued/revoked by the Department of Insurance on file with the clerk by date.	Dept. of Insurance	CY + 3	CCP 995.630; CCP 995.640; CCP 995.660	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-125	CY	+2	Daily Processing Logs	This includes scanning logs, notary journal receipt letter/logs, etc.	County Clerk	CY + 2	GOV 26202	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-150	CY	+2	Deputy Commissioner For the Day	Applications and supporting documentation for	County Clerk	CY + 2	GOV 26202	Shred / Delete	DRRS_ACR-C_2023_REV06

					Deputy Commissioner for the Day applicants.					
DRRS	ACR-C-175	CY	+1	Environmental Findings	California Environmental Quality Act: Negative Declaration and Notice of Determination, Public Notice of Environmental Finding (Posting Page) Duplicate copies of notices of projects with environmental impact implications.	County Clerk	CY + 1	14 CCR 753.5(f)	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-200	CY	+1	Environmental Findings Index	Index is used to create the posting page.	County Clerk	CY + 1	14 CCR 753.5(f); Best Practice	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-225	CY	+2	Error Supsense Logs	Logs documenting errors and backup documentation supporting attempts to contact customer to correct errors.	County Clerk	CY + 2	GOV 26202	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-275	Lien YR	+4	Fictitious Business Names	Original Fictitious Business Name Statements of for profit businesses, on file with clerk by file number. Statement of Abandonment and Withdrawal of Partnership, records of business name statements that have been abandoned or withdrawn, on file with clerk by file number. Affidavit of Publication of Fictitious Business Name	County Clerk	EXP + 4	BPC 17925(b); BPC 17927(a)	Shred / Delete	DRRS_ACR-C_2023_REV06

					Statement, proof that FBN statement was published with an adjudicated newspaper, on file with clerk by file number.					
DRRS	ACR-C-300	CY	+3	Humane Officer Oath of Office	Record of appointed Humane Officers, badge number, and judge appointment, date of expiration or revocation if applicable.	County Clerk	CY + 3	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-325	Scanned P	+500	Humane Officer Registry	Permanent Record of Humane Officers listing name, badge number, appointing judge, appointment date, expiration or revocation date.	County Clerk	P	CORP 14502(d); CORP 14502(f)(1); Best Practice	Dept.	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-350	Scanned P	+500	Index of Deputy County Clerks	List information on appointments and revocations.	County Clerk	P	GOV 24102; Best Practice	Dept.	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-450	CY	+2	Marriages, Application & Court Order to Obtain Information re: Confidential	Application submitted to a judge to obtain information regarding a confidential marriage.	County Clerk	CY + 2	GOV 26202	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-475	CY	+2	Marriages - Application	Records related to the application for marriage licenses. Records series may include application worksheet and any supporting documentation for license.	County Clerk	CY + 2	GOV 26202; California Marriage Certificate Registration Handbook from DHS Pg.36, Par4	Shred / Delete	DRRS_ACR-C_2023_REV06

								date 5/4/2009.		
DRRS	ACR-C-525	Scanned P	+500	Marriages - Certificate of Confidential Marriage	Certificates and index of confidential marriage that establish a record of marriage.	County Clerk	P	FAM 511(b) may be microfilmed per GOV 26205; Best Practice	Dept.	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-535	CY	+3	Marriages - Expired / Unrecordable Licenses	License and related correspondence for public and confidential marriage that have expired or were unrecordable.	County Clerk	CY + 3	GOV 26202; FAM 360(b); Best Practice	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-550	Scanned P	+500	Marriage, Index of Confidential	Permanent Index of Registered Confidential Marriages.	County Clerk	P	FAM 511(b) may be microfilmed per GOV 26205; Best Practice	County Archives	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-575	CY	+3	Marriages - Notary Authorization	Records related to the application and approval of a notary public authorizing them to issue confidential marriage licenses.	County Clerk	CY + 3	GOV 26202; Best Practice	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-585	Scanned P	+500	Marriages - Notary Authorization List	A list of the notaries public who are approved to issue confidential marriage licenses.	County Clerk	P	FAM 400(a); FAM 401(a)(d); FAM 534(a); Best Practice	Dept.	DRRS_ACR-C_2023_REV06

DRRS	ACR-C-600	Scanned Date	+10	Notary Journals	Notary journals and index deposited with county clerk following resignation, disqualification, removal from office or expiration of appointment.	County Clerk	Upon Court Order 10 years after receipt or reset date due to line item inquiry.	GOV 8209(c)	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-625	Scanned P	+500	Notary Journals, Index	Permanent index of deposited journals listing notary name, commission number, date journals were surrendered, destruction date of journals.	County Clerk	P	GOV 8209(c); Best Practice	County Archives	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-650	Lien YR	+1	Oaths - Notary Public	Notary public oaths taken, commission number, date of commission and copy of oath. On file with clerk by file number.	County Clerk	EXP + 1	GOV 8213(a)	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-675	Scanned Date	+5	Oaths- Public Office	Oaths taken for public office filed with the County Clerk and expire upon revocation.	County Clerk	Revocation + 5	GOV 24102(d)	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-855	Lien YR	+10	Registrations	Records of registrations listing the name, file number, date filed and copy of cash deposit slip.	County Clerk	EXP + 3 (paper) or EXP + 10 (electronic)	BPC 6403(e); BPC 6405(g); BPC 22351(c); BPC 22452(c)	Shred / Delete	DRRS_ACR-C_2023_REV06
DRRS	ACR-C-860	Scanned P	+500	Registrations Log	Record of registrations listing name, file number, date filed.	County Clerk	P	BPC 6407(a); BPC 22355(a);	Dept.	DRRS_ACR-C_2023_REV06

								BPC 22457(a)		
DRRS	ACR- C-875	Scanned P	+500	Roster of Public Agencies	Roster of names and addresses of public agencies and their officials as submitted by the public agency.	County Clerk; Secretary of State	P	GOV 53051(c)	Dept.	DRRS_ACR- C_2023_REV06
DRRS	PROB - INS60 0	Scanned Date	+5	Client File - Treatment	May include police reports, admittance/release packets, youth's identifying documents, case management documents, courts documents, and documents collected from collateral agencies.	Dept.	Release from facility + 5	GC 26202; Best Practice	Shred / Delete	DRRS_ACR- C_2023_REV06