

Department	Division	Description	Explanation	Document Type	Security	Status	Records Retention Class	Legal Requirement	On Site	Records Center	Method of Disposition	Total Retention Time	Remarks
<p>* For Litigation Hold records, suspend normal retention periods (retention begins after final action-settlement).</p> <p>* Destruction of duplicate copies is authorized pursuant to Government Code Section 26201.</p> <p>* Departments may keep records onsite longer in order to fill up the box before sending to the Records Center.</p> <p>* Records Retention Class: AU=audit plus (x) years, B=2 years, CL=closed plus (x) years, CU=current year plus (x) years, D=clinical retention period, I=Indefinite</p> <p>* Any reference to retention periods for copies in the remarks sections are not legally binding retention periods, but internal timelines and practices to ensure efficiency in County operations.</p>													
ALL												Red-line REV. 2026	
Financial Records													
		Accounting Reports generated by the departments	May include various accounting reports including encumbrance reports, revenue/expense reports.	ALL-1	OV	CC Approved	CU		CU + 2 YRS	0		CU + 2 YRS	Reports are retained in the PeopleSoft system. Keep for CU + 2 YRS for audit purposes.
		Accounts Payable	May include records related to the procurement of and payment for goods and services; warrants/ledgers, purchasing records, claims, invoices, petty cash records, travel expense.	ALL-2	OV	CC Approved	CU		Minimum of CU + 1 YR	4 YRS		CU + 5 YRS	ORIGINALS: GC 26907. CU + 5 YRS retention. COPIES: Keep for CU + 2 YRS for audit purposes. If any of the documents are for grants refer to the retention schedule for Grants. Also reference Auditor-Controller's Office's 'Accounts Payable Procedures for Departments' section N.
		Accounts Receivable & Cash Receipts	May include deposit authorizations, receipts, bank statements and reconciliations, interoffice & outside billings for services provided by the County offices.	ALL-3	OV	CC Approved	CU		Minimum of CU + 1 YR	4 YRS		CU + 5 YRS	ORIGINALS: GC 26907. CU + 5 YRS retention. COPIES: Keep for CU + 2 YRS for audit purposes. If any of the documents are for grants refer to the retention schedule for Grants.
		Federal and State Funds	Supporting documents for the funding from the Federal and State Government.	ALL-4	OV	CC Approved	CL		Minimum of CL + 2 YRS	3 YRS		CL + 5 YRS, or until audited, whichever is first	GC 26202. If retention is depicted in funding documents, follow as required in documents unless County Retention Schedule exceeds.
		Grants-Successful grants	May include applications, correspondence [emails] and other records relating to successful applications.	ALL-5	OV	CC Approved	CL		Minimum of CL + 2 YRS	3 YRS		CL + 5 YRS	GC 26202. If retention is depicted in Grant documents, follow as required in Grant documents unless County Retention Schedule exceeds.
Purchasing Records													

		<u>AGENDAS & AGENDA PACKETS</u>	<u>Agendas of the meetings and hearings of the BOS and all boards, commissions and special districts. May include agendas & staff reports for special districts and other entities governed by the BOS as well as special meeting notices, certificates of posting, original summaries, original communications and action agendas for Boards, Committees and Commissions. Includes Affidavits of Posting / Legal Advertising / Affidavits of Publications.</u>	<u>ALL-12</u>	<u>ALL</u>	<u>CC</u>	<u>!</u>	<u>!</u>	<u>3 YRS</u>	<u>!</u>	<u>M</u>	<u>!</u>	<u>Agenda information is included in the minutes which are a permanent record. In addition the agendas are online and included in the agenda packets which are permanent. 2 years required - GC 26202 et seq..</u> REPLACES COB-4
		<u>BOARDS, COMMISSIONS & COMMITTEES</u>	<u>May include oaths of office, and membership lists.</u>	<u>ALL-13</u>	<u>OV</u>	<u>CC</u>	<u>!</u>	<u>!</u>	<u>3 YRS</u>	<u>!</u>	<u>M</u>	<u>!</u>	<u>2 years required - GC 26202 et seq.</u> REPLACES COB-18 INCORPORATES COB-43
		<u>MINUTES</u>	<u>Minutes of the proceedings of the BOS and all boards, commissions and special districts. Included ordinances and resolutions, appointments and resignations of County officers and employees, statements of election results, lists of claims made against the County, budget information, and any reportable actions taken in closed session. Generally contains date, time and place of meeting, names of members present and absent, nature of business, actions taken, and recorded vote of the governing body.</u>	<u>ALL-14</u>	<u>ALL</u>	<u>CC</u>	<u>!</u>	<u>!</u>	<u>0</u>	<u>!</u>	<u>M</u>	<u>!</u>	<u>2 years required - GC 26202 et seq..</u> REPLACES COB-42 INCORPORATES COB-56
		<u>PETITIONS</u>	<u>Petitions sent to the BOS or any board, commission or special district protesting or requesting board action. May include signed petitions verified by the County clerk. Does not include Referendum, Initiative or Recall petitions.</u>	<u>ALL-15</u>	<u>C</u>	<u>CC</u>	<u>CU</u>	<u>CU+2YRS</u>	<u>CU+2YRS</u>	<u>none</u>		<u>CU+2YRS</u>	<u>2 years required - GC 26202 et seq..</u> REPLACES COB-50

		<u>RESOLUTIONS</u>	<u>Resolutions are evidence of the formal opinion of determination of the BOS and all boards, commissions and special districts. Original resolutions passed by the BOS and all boards, commissions and special districts. Contains date passed, number and subject of resolutions, names of interested parties, names of members voting and nature of action.</u>	<u>ALL-16</u>	<u>ALL</u>	<u>CC</u>	<u>!</u>	<u>!</u>	<u>3 YRS</u>	<u>!</u>	<u>M</u>	<u>!</u>	<u>GC 25102.1; 2 years required - GC 26202 et seq.</u> REPLACES COB-57
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