

Program: Assessor-Recorder/County Clerk													Red-line REV. 2026	
Dept	Div	Description	Explanation	Document Code	Security	Status	Records Retention Class	Legal Requirement	On Site	Records Center	Method of Disposition	Total	Remarks	
		Preliminary Change of Ownership Report	Filed with every document that affects property ownership	ASSESS-1	Assessor office employees only		CU	CU + 7 YRS	CU + 1 YR	6 YRS			R&T 834.	
		571L Business Property Statements	Statements filed each year by business property owners	ASSESS-2	Assessor office employees only		CU	CU + 7 YRS	CU + 4 YRS	3 YRS			R&T 834.	
		Homeowner Exemption Claim Form	Claim filed by property owners to qualify for the homeowner exemption	ASSESS-3	Assessor office employees only		CL	6 YRS after the lien date and 6 YRS after exemption last granted.	CL + 1 YR	5 YRS			R&T 465	
		Federal Tax Lien (Released)	Document recorded to serve notice that a tax lien has been satisfied	ASSESS-4	This is a public record that can be viewed by anyone		P	Permanent	Hard Copy: Once the film has been made, original hard copy mailed to the address on the document. Electronic: Film stored permanently on offsite storage.	N/A			GC 27206 - Department has silver film made by a vendor and store it offsite. Once the film has been made, the original is mailed to the address on the document - usually 4-6 weeks. Images stored on \\dloc1\images server.	
		Federal Tax Lien (Unreleased)	Public notice that a lien has been recorded	ASSESS-5	This is a public record that can be viewed by anyone		P	Permanent	Hard Copy: Once the film has been made, original hard copy mailed to the address on the document. Electronic: Film stored permanently on offsite storage.	N/A			GC 27206 - Department has silver film made by a vendor and store it offsite. Once the film has been made, the original is mailed to the address on the document - usually 4-6 weeks. Images stored on \\dloc1\images server.	
		Notice of Completion	Public notice that construction on a property has been completed.	ASSESS-6	This is a public record that can be viewed by anyone		CL	CL + 5 YRS	Hard Copy: Once the film has been made, original hard copy mailed to the address on the document. Electronic: Film stored permanently on offsite storage.	N/A			GC 27205 - Typically no plans, etc are presented when a notice of completion is recorded. Department has silver film made by a vendor and store it offsite. Once the film has been made, the original is mailed to the address on the document - usually 4-6 weeks. Images stored on \\dloc1\images server.	
		Original Recordable Document	Document recorded for transfer of property etc.	ASSESS-7	This is a public record that can be viewed by anyone		P	Permanent	Hard Copy: Once the film has been made, original hard copy retained for 2 YRS from recording. Electronic: Film stored permanently on offsite storage.	N/A			GC 26205.6 - States hard copy can be destroyed 2 years after being recorded if document is microfilmed. Electronic version kept permanently on \\dloc1\images server. Stored offsite.	
		Birth, Death, Marriage Certificates	Records of a person's birth, death or marriage	ASSESS-8	Authorized persons by statute and recorder-clerk employees		P	Permanent (microfilm ok if other statutory requirements are met)	3 months	N/A			Gov. Code 27208 and H&S 102235 - County stores the hard copies of the older birth & death records. Once scanned and indexed the current records, the hard copy is shredded after 2 years. Marriage records are sent to the office of vital records for permanent storage. Images stored on \\dloc1\images server.	
		Oaths of office	Oaths for employees and officials	ASSESS-9	employees of the Recorder-Clerk office		CL	Current appointment + 5 YRS	CL + 5 YRS	N/A			GC 24102	
		Oath revocations	Oaths of office that have been revoked	ASSESS-10	employees of the Recorder-Clerk office		CL	CL + 5 YRS	CL + 5 YRS	N/A			GC 24102	
		Notary Oaths	Oaths of notaries after receiving their commission	ASSESS-11	employees of the Recorder-Clerk office		CL	Term + 1 YR	Term + 1 YR	N/A			GC 8213	
		Notary Journals	Records of signatures of persons a notary acknowledged	ASSESS-12	Employees of the Recorder-Clerk office		CL	10 YRS from receipt. If viewed during retention additional 10 YRS.	CL + 1YR	9 YRS			GC 8209. Order of Court is required to destroy the records at the end of the retention period.	
		Confidential Marriage Certificates	Record of confidential marriage	ASSESS-13	Parties to the marriage and recorder-clerk employees		P	Hard Copy: 1 YR if copied in conformance with H&S 102235. Otherwise Permanent. Electronic: Permanent	Hard Copy: 1 YR if microfilmed. Otherwise Permanent. Electronic: Permanent	N/A			See H&S 102230, 102235	
		Public Marriage Licenses	Record of public marriage	ASSESS-14	Parties to the marriage and recorder-clerk employees		P	Original hard copy is forwarded to the California Dept of Public Health Vital Records. Electronic recording permanent.	N/A	N/A			See H&S 102235	
		Application for Marriage License	Firm completed by couples purchasing a marriage license	ASSESS-15	Parties to the marriage and recorder-clerk employees		CL	CL + 2 YRS	CL + 2 YRS	0			County Clerk-Recorder is required to keep the applications for marriage licenses for 2 years in case the couple discovers that the office made an error with the new name selection by the couple. Scanned application is currently stored on the recorder clerk shared drive.	
		Deputy Marriage Commissioner oaths	Persons who are sworn in to perform one specific marriage ceremony	ASSESS-16	Recorder-County Clerk employees		CL	Date of oath + 1 YR	CL + 2 YRS	0			GC 26809	
		Affidavit for Duplicate Marriage License	Document required if original marriage license is not acceptable for registering	ASSESS-17	Recorder-County Clerk employees		CL	Date of oath + 1 YR	CL + 2 YRS	0			GC 26809	
		Affidavit inability to Appear - Marriage License	Document required if one party to the marriage is unable to appear in person to apply for the marriage license	ASSESS-18	Recorder-County Clerk employees		CL	Date marriage license issued + 2 YRS	CL + 2 YRS	0			GC 26202, 26205	
		Fictitious Business Name	Filing for "doing business as" notice	ASSESS-19	Recorder-County Clerk employees		CL	9 YRS from date of filing	CL + 5 YRS	4 YRS			BP 17927	
		Affidavit of Fictitious Business Name Publication	Affidavit from newspaper that the FBN filing was published for the required 4 weeks	ASSESS-20	Recorder-County Clerk employees		CL	9 YRS from date of filing	CL + 5 YRS	4 YRS			BP 17927 - These documents are attached to the FBN statement and become part of the filing	
		Abandonment of Fictitious Business Name	Public notice that a "dba" is no longer being used by a person	ASSESS-21	Recorder-County Clerk employees		CL	9 YRS from date of filing	CL + 5 YRS	4 YRS			BP 17927	
		Withdrawal of General Partner - Fictitious Business Name	Public notice that a "dba" general partner is no longer associated with that dba	ASSESS-22	Recorder-County Clerk employees		CL	9 YRS from date of filing	CL + 5 YRS	4 YRS			BP 17927	
		Process Server Registration	Registration of persons who are licensed to be process servers	ASSESS-23	Recorder-County Clerk employees		CL	Current term + 8 YRS	Current term + 8 YRS	0			BP 22351	
		Professional Photocopier Registration	Registration of persons who are licensed to be professional photocopiers	ASSESS-24	Recorder-County Clerk employees		CL	Current term + 8 YRS	Current term + 8 YRS	0			BP 22452	
		Legal Document Assistant Registration	Registration of persons who are licensed to be legal document assistants	ASSESS-25	Recorder-County Clerk employees		CL	CL + 15 YRS	CL + 15 YRS	0			BP 6403	
		Unlawful Detainer Assistant	Registration of person who are licensed to be unlawful detainer assistants	ASSESS-26	Recorder-County Clerk employees		CL	CL + 15 YRS	CL + 15 YRS	0			BP 6403	
		California Environmental Quality Act Reports	Cover Letter of Reports to Calif. Dept. of Fish and Game for CEQA Filings	ASSESS-27	Recorder-County Clerk employees		CL	CL + 2 YRS	CL + 2 YRS	0			GC 26202	
		Index of Environmental Filings	Index of CEQA Filings	ASSESS-28	Recorder-County Clerk employees		P	Permanent	Permanent	0			F&G 711.4(e)(1). Kept on Recorder Clerk shared drive	
		CEQA Filings	EIR, Negative Declaration etc. Filings required for certain projects	ASSESS-29	Recorder-County Clerk employees		P	Permanent	Permanent	0			14 CCR 753.5(f)	
		CEQA Postings	Postings for certain projects	ASSESS-30	Recorder-County Clerk employees		CL	CL + 2 YRS	CL + 2 YRS	0			14 CCR 753.5(f)	
		Powers of Attorney - Surety Companies	See title.	ASSESS-31	Recorder-County Clerk employees		P	Permanent	Permanent	0			CCP-995.630	
		Grand Jury Responses	See title.	ASSESS-32	Recorder-County Clerk employees		P	Permanent	Permanent	0			Penal Code 933	

* For Litigation Hold records, suspend normal retention periods (retention begins after final action-settlement).

* Destruction of duplicate copies is authorized pursuant to Government Code Section 26201.

* Departments may keep records onsite longer in order to fill up the box before sending to the Records Center.

* 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, P=permanent

* 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.

	Grand Jury Reports	See title.	ASSESS-33	Recorder-County Clerk employees		P	Permanent	Permanent	0		Penal Code 933
	Business Property Audits	See title.	ASSESS-34	Assessor office employees only		CL	CL + 8 YRS	CL + 8 YRS	0		GC 26202. See R&T 532.
	BOE-502-D / DOBP	Change in Ownership Statement, Death of Property Owner (DOBP)	ASSESS-DOBP	Assessor office employees only		B	2 YRS	N/A	N/A		R&T 465 ; retain 7yrs minimum. We like to keep for future reference/ research.
	BOE-58-AH Prop 58	Claim for Reassessment Exclusion for Transfer Between Parent and Child (Prop 58 Filed prior to 2013)	ASSESS-Prop 58	Assessor office employees only		P	7YRS	N/A	N/A		R&T 465 ; retain 7yrs minimum. We like to keep for future reference/ research.
	BOE-58-G Prop 193	Claim for Reassessment Exclusion for Grandchild (Prop 193 filed prior to 2013)	ASSESS-Prop 193	Assessor office employees only		P	7 YRS	N/A	N/A		R&T 465 Retain 7yrs minimum. We like to keep for future reference/ research.
	Legal Entity support documentation	Legal Entity documents submitted to support exclusion, Operating Agreements, Partnership Agrmts, Articles of Incorpor, etc.	ASSESS-LE Support docs	Assessor office employees only		B	N/A	N/A	N/A		There is no requirement to retain these documents. We like to keep for future reference/ research.
	LEOP Reports	Monthly Findings Report from BOE-LEOP with BOE 100-B and supporting documentation	ASSESS-LEOP	Assessor office employees only		P	7YRS	N/A	N/A		R&T 465 . Retain 7yrs minimum. We like to keep for future reference/ research.
	Historical mapping changes	Maps, correspondence and support documentation	ASSESS-Hist Map Chgs	Assessor office employees only		B	Permanent	Permanent	N/A		There is no requirement to retain these documents. These are support documentation and correspondence submitted with mapping changes. These will continue to be valuable reference/support material when researching issues and changes to property lines.
	Mapping Split Sheet Packet	Internal documents used to assist appraiser with determining values when lots split, proposed maps, misc. documentation submitted with mapping request, and notes from mapper during mapping process.	ASSESS-Split Sheet Pkg	Assessor office employees only		B	Permanent	Permanent	N/A		These are the same types of documentation that would have been found under Historical Mapping Changes but now collected under different process/procedures. These contain internal documents used to assist appraiser with determining values when lots split, proposed maps, misc. documentation submitted with mapping request, and notes from mapper during mapping process. These will continue to be valuable reference/support material when researching issues and changes to property lines.