

Attachment B

Clerk-Recorder Records Retention Schedule

SANTA BARBARA COUNTY CLERK-RECORDER | RETENTION SCHEDULE (GOV 26205.5)

CORRESPONDENCE

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Rejection letters and customer correspondence		Current Year plus 2 Years	GOV 26202	Rejections stored electronically in the Recording System; customer correspondence stored at Hall of Records

COUNTY RECORDER FUNCTIONS - RECORDED DOCUMENTS, FILED DOCUMENTS, AND MAPS

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Building Contracts	Plans and Specs	May be returned 2 years after Notice of Completion is recorded; May be destroyed 5 years after filing, unless someone has a claim	GOV 27205	Originals kept in Hall of Records basement
Federal Tax Liens	IRS Liens	Permanent Official Record	GOV 27206	Stored electronically in the Recording System and Microfilm required
Financing Statements	Also known as UCCs	Permanent Official Record	COM 9522	Stored electronically in the Recording System and Microfilm required
Involuntary Lien Notices returned by Postal Service as undeliverable		None	GOV 27297.5(g)	Discarded upon return
Preliminary 20-day Notices filed for private works of improvement		Current Year plus 2 Years	CIV 8214	Originals stored at Hall of Records and electronically in the Recording System
Agricultural Preserves (Contracts, Notices of Non-Renewal, Assumptions)		Permanent Official Record	GOV 51200 et seq (Williamson Act)	Stored electronically in the Recording System and Microfilm required
Unclaimed/undeliverable recorded Official Records		2 Years after date of recording	GOV 26205.6 (b) GOV 27208	Hall of Records Vault

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Maps-Parcel, Tract, Record of Survey, Condominium, State Hwy, State Highway Monumentation, Official, Miscellaneous, and Assessment District	Permanent	GOV 27320-27336	“Target Sheet” is filmed and stored electronically in the Recording System; Original maps are stored at Archive Mezzanine; Digital images are maintained by County Surveyor’s office.
Subdivision and Parcel Map Guarantees	Permanent	GOV 66410 (Subdivision Map Act)	Originals are stored at Hall of Records and electronically in the Recording System
Documentary Transfer Tax Affidavits	Current Year plus 3 Years	GOV 26202	Stored in Hall of Records basement
Proof of Publications of Delinquent Tax List	Current Year plus 7 Years	RTC 3374	Stored in Hall of Records
Official Record Copy order request	Current Year plus 7 Years	GOV 26202	Stored electronically in the Recording System, paper applications stored in Hall of Records

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VITAL RECORDS

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Vital Records, including amendments and sealings	Birth, Death, Marriage	Permanent	HSC 102100-103800	Stored electronically in the Recording System; books and microfilm stored in the Hall of Records Vault and archive mezzanine
Vital Record Applications		Current Year plus 7 years	GOV 26202	Stored electronically in the Recording System
Vital Records returned by Postal Service as undeliverable or unclaimed		Current Year plus 10 Years	GOV 26205.6(a)	Stored in Hall of Records vault
Regular/Public Marriage Certificates & Amendments		Permanent	HSC 102355	Stored electronically in the Recording System and microfilm required; Originals sent to CDPH-OVR
Confidential Marriage Certificates & Amendments		Permanent	HSC 102100-103800	Stored electronically in the Recording System and microfilm required; Photocopies sent to CDPH-OVR; Originals stored in the Hall of Records vault (as of 2023)
Marriage License Application		Current Year plus 7 Years	GOV 26202	Stored electronically in the Recording System
Duplicate marriage license files	Original marriage license, duplicate affidavit, correspondence	Current Year plus 2 Years	GOV 26202	Stored in Hall of Records (Original marriage license is destroyed upon registration of duplicate)

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COUNTY CLERK FUNCTIONS

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Fictitious Business Name (FBN) Statements, index, proof of publication		Current Year plus 10 Years (or 4 years from date of expiration)	BPC 17900 et seq.	Paper files and proof stored in Hall of Records and stored electronically in the Recording System
Notices of renewal for FBN statements returned by Postal Service as undeliverable		None	BPC 17900 et seq.	Discarded upon return
Domestic Partnerships		Permanent	SB County Code Chapter 42 Sections 1-7	Stored electronically in the Recording System
Humane Officer Appointments/Oaths		Current Year plus 3 years after expiration	GOV 26202	Stored electronically in the Recording System
Humane Officer Index/Registry		Permanent	CORP 14502(d) CORP 14502(f)(1)	Stored electronically in the Recording System
Notary Journals		Current Year plus 10 years from date the records are delivered to the County Clerk or 10 years from the date a request is made. Court order required	GOV 8209	Stored in archive mezzanine
Notary Public Oaths		Current Year plus 6 Years	GOV 8213(a)	Original sent to CA Secretary of State; Stored electronically in the Recording System.
Oaths of Office (Deputy Marriage Commissioners, Probation Officers, etc.)		5 years after date of revocation	GOV 24102 (d)	Stored electronically in the Recording System

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Legal Document Assistant filings & index		Paper filings: 3 Years after term expires. Electronic filings: 10 years after term expires Index - Permanent	Filing: BPC 6403(e) Index: BPC 6407(a)	Filed in Hall of Records; Stored electronically in the Recording System (as of 5/4/2020).
Process Server filings & index		Paper filings: 3 Years after term expires. Electronic filings: 10 years after term expires Index - Permanent	Filing: BPC 22350-22351 Index: BPC 22355(a)	Filed in Hall of Records; Stored electronically in the Recording System (as of 5/4/2020).
Professional Photocopier filings & index		Paper filings: 3 Years after term expires. Electronic filings: 10 years after term expires Index - Permanent	Filing: BPC 22452(c) Index: BPC 22457 (a)	Filed in Hall of Records; Stored electronically in the Recording System (as of 5/4/2020).
Unlawful Detainer Assistant filings & index		Paper filings: 3 Years after term expires. Electronic filings: 10 years after term expires Index - Permanent	Filing: BPC 6403(e) Index: BPC 6407(a)	Filed in Hall of Records; Stored electronically in the Recording System (as of 5/4/2020).
Power of Attorney for Certified Surety Insurers		Permanent		Filed in Hall of Records; Stored electronically in the Recording System (as of 5/4/2020).

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ACCOUNTING RECORDS

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Daily accounting		Current Year plus 7 Years	GOV 26907	Filed in Hall of Records; Stored Electronically as of 5/4/2020
Voided banknote				Destroy after one month, Reconciliation logs maintained electronically

OLDER/ARCHIVAL/DISCONTINUED RECORDS AND CLERK FUNCTIONS

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Dissolutions of Partnerships		Permanent		Filed in Hall of Records; Stored Electronically as of 5/4/2020
Military Rolls		Permanent		Archive Mezzanine
List of Surveyors	Discontinued in 1975	Permanent		Archive Mezzanine
Mailing books/fee sheets	Discontinued in 1975	Permanent		Archive Mezzanine

MISCELLANEOUS

TITLE	DESCRIPTION	RETENTION/DESTRUCTION PERIOD	CODE SECTION	REMARKS
Video Recordings	Video Monitoring	1 year	GOV 26202.6	Approval by Department Head

ABBREVIATIONS

CDPH-OVR – California Department of Public Health-Office of Vital Records

CIV – California Civil Code

COM – California Commercial Code

CORP – California Corporations Code

BPC – California Business & Professions Code

GOV – California Government Code

HSC – California Health & Safety Code

RTC – California Revenue & Taxation Code