

SANTA BARBARA COUNTY BOARD AGENDA LETTER



Clerk of the Board of Supervisors
105 E. Anapamu Street, Suite 407
Santa Barbara, CA 93101
(805) 568-2240

Agenda Number:

Prepared on: 9/6/04
Department: Clerk-Recorder-Assessor
Budget Unit: 062
Agenda Date: 10/5/04
Placement: Administrative
Estimate Time:
Continued Item: NO
If Yes, date from:

TO: Board of Supervisors

FROM: Joseph E. Holland
County Clerk-Recorder-Assessor

STAFF CONTACT: Rose Rodarte
Ext. 2687

SUBJECT: Application for Destruction of Records

Recommendation(s):

That the Board of Supervisors:

Approve the attached certification of approval for the destruction of records after the legal retention period has been met for those records not expressly required by law to be filed or preserved permanently or for a specified period of time. Attached schedule of records for destruction specifies required retention periods.

Alignment with Board Strategic Plan:

The recommendation is primarily aligned with actions required by law or by routine business necessity.

Executive Summary and Discussion:

Mandates and Service Levels: County Policy #010-008

Fiscal and Facilities Impacts: None

Special Instructions: Send a copy of minute order and the approved Application For Destruction of Records to Rose Rodarte, Clerk-Recorder-Assessor.

Concurrence:

Auditor-Controller
County Counsel

APPLICATION FOR DESTRUCTION OF RECORDS

CERTIFICATION OF APPROVAL

TO: Board of Supervisors
County of Santa Barbara, California

The undersigned officer hereby applies, pursuant to the law cited below, for an order to annually, or as needed, destroy the records described in the attached schedule and to excuse said officer and his/her assistants, deputies and employees from further custody of said records.

Code and Section Number: 26201-26205 of the Government Code
465 of the Revenue & Taxation Code

Reasons for destruction: Age and lack of space to store them.

The undersigned officer declares under penalty of perjury that he/she is the supervisor and custodian of the described records of his/her department of the County of Santa Barbara, and that he/she has read the foregoing application and knows the contents thereof, on his/her information and belief, to be true.

Executed at Santa Barbara, California, on September 21, 2004.

Rose Rodarte
County Clerk-Recorder-Assessor
Cost Analyst

APPROVED:

COUNTY COUNSEL

AUDITOR-CONTROLLER

BY: _____

BY: _____

CERTIFICATION OF APPROVAL

I hereby certify that the above application was approved and adopted on _____, 2004, by the following vote of the Board of Supervisors:

AYES:

NOES:

ABSENT:

County Clerk and ex officio Clerk of the
Board of Supervisors, County of Santa Barbara
State of California

BY: _____

CLERK-RECORDER-ASSESSOR

SCHEDULE OF RECORDS FOR DESTRUCTION

Clerk-Recorder-Assessor Santa Barbara, Santa Maria & Lompoc Offices

Type of Record	Original or Copy	Period Covered
Affidavit & Record of Deposit	Copies	5 years from current Fiscal year.
Clerk-Recorder Accounts Receivable – Government Billings	Originals	5 years from current Fiscal year.
Clerk-Recorder Charge Registers – Official Records and Vital Records	Originals	5 years from current Fiscal year.
Clerk-Recorder Work Request Receipts	Originals	5 years from current Fiscal year.
Clerk-Recorder Work Requests/Copy Orders	Originals	5 years from current Fiscal year.
Daily Balancing Reports	Originals	5 years from current Fiscal year.
Payroll/Personnel Records	Copies	5 Years from current Fiscal year.
Miscellaneous paper work: purchase requisitions, quick copy orders, printing requisitions and various order forms	Copies	5 years from current Fiscal year.
Month End Balancing Reports	Copies	5 years from current Fiscal year.
Payment claims, journal entries, purchase orders, contracts and petty cash claims.	Copies	5 years from current Fiscal year.
Receipt books	Copies	5 years from current Fiscal year.

CLERK-RECORDER-ASSESSOR
SCHEDULE OF RECORDS FOR DESTRUCTION

Assessor Santa Barbara, Santa Maria & Lompoc Offices - Page 1

Type of Record	Original or Copy	Period Covered
Address Changes	Original	Six years from lien date for which that information was obtained.
Aircraft Statements	Originals	Six years from lien date for which that information was obtained.
Appeals Files	Originals	Six years from lien date for which that information was obtained.
Base Year Value Transfers (Prop 60)	Originals	Six years from lien date for which that information was obtained.
Boats (Vessels) Property Statements	Originals	Six years from lien date for which that information was obtained.
Business Property Audit Records	Originals	Six years from lien date for which that information was obtained.
Business Property Statements	Originals	Six years from lien date for which that information was obtained.
Change of Ownership Notices	Originals	Six years from lien date for which that information was obtained.

CLERK-RECORDER-ASSESSOR
SCHEDULE OF RECORDS FOR DESTRUCTION

Assessor Santa Barbara, Santa Maria & Lompoc Offices - Page 2

Type of Record	Original or Copy	Period Covered
Escaped Assessments	Originals	Six years from lien date for which that information was obtained.
Home Owners Multiple Claims List	Originals	Six years from lien date for which that information was obtained.
Mineral Property Statements	Originals	Six years from lien date for which that information was obtained.
Parent Child Exemptions (Prop 58)	Originals	Six years from lien date for which that information was obtained.
Property System List	Originals	Six years from lien date for which that information was obtained.
Receipt Books	Copies	Six years from lien date for which that information was obtained.
Roll Corrections	Originals	Six years from lien date for which that information was obtained.
Unsecured Property - Tax 203	Originals	Six years from lien date for which that information was obtained.
Unsecured Property Records	Originals	Six years from lien date for which that information was obtained.
Veteran's Exemptions	Originals	Six years from lien date for which that information was

		obtained.
Welfare Exemptions	Originals	Six years from lien date for which that information was obtained.

GROUP\FINANCE\DEPT\BDLRECRD