



1 RECORDS RETENTION SCHEDULE : Assessor-Recorder-County Clerk

2 EFFECTIVE DATE: 5/20/2025

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3 CUSTODIAN OF RECORD	4 TITLE & DESCRIPTION OF RECORD	5 VITAL	6 ARCHIVES	7 TOTAL RETENTION	8 LEGAL AUTHORITY & POLICY PREFERENCE & COMMENTS
1 Assessor	Address Changes	yes		Permanent	department preference; GC§26202; R&T §465
2 Assessor	Applications for exemption claims: homeowners or Veterans or Other (HOX)	yes		7 years	department preference; Property Tax rule 135 (e)(5) allows for destruction after the lien date for the last year for which the exemption claim was active; GC§§26907 et seq., 26202
3 Assessor	Appraisal records/Master Appraisal Document (MAD): reports of Investigation, permit questionnaires, possessory interests, etc.	yes		7 years	department preference for ease in document imaging management; postponed amounts for Possessory interests become due after certain events (sells, doesn't occupy, death, ineligible, etc.); GC§§26202, 26205.1
4 Assessor	Assessment Rolls: Statistics			12 years	GC§26202, R&T§4377
5 Assessor	Assessor Parcel Maps	yes	yes	revision +7 years	send to Archives, Maps are for assessment purposes only; GC§26202
6 Assessor	Building Permits (submitted by cities)			2 years	cities or issuing agency maintains originals; GC§26202
7 Assessor	Business Property Records/Business Property Statements (BPS) - Cell towers permits, etc.	yes		7 years	Assessor or Board may destroy any taxpayer's document lien date + 6 years; statewide guidelines propose 4 years, GC§§26202, 26205.1, R&T§§465, 834
8 Assessor	Change of Ownership (COS) - Includes attached deed references and notes	yes		7 years	department preference; Assessor or Board may destroy any taxpayer's document lien date + 6 years; statewide guidelines propose 4 years, GC§26202, R&T§§465, 834
9 Assessor	Co-Op Audits (Audits performed by another County on San Bernardino property)	yes		7 years	department preference; Assessor or Board may destroy any taxpayer's document lien date + 6 years; statewide guidelines propose 4 years, GC§26202, R&T§§465, 834
10 Assessor	Co-Op Audits (Audits performed for Other Counties)	yes		2 years	GC§26202
11 Assessor	Corrections - Secured (includes Tax Collector notifications of any penalties to be waived etc.)	yes		7 years	department preference; Assessor or Board may destroy any taxpayer's document lien date + 6 years; statewide guidelines propose 4 years, GC§26202, R&T§§465, 834
12 Assessor	Exclusions: Property damage, decline in market value, reassessment transfers, etc.	yes		7 years	department preference; Property Tax rule 135 (e)(5) allows for destruction after the lien date for the last year for which the exemption claim was active; GC§§26907 et seq., 26202
13 Assessor	Last Year Audited (LYA) (Business Property)	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
14 Assessor	Names Address Legal (NAL)/ Not Accessible Value (NAV) (Business Property)	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
15 Assessor	Permit Questionnaires/Posnic (new construction)			7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
16 Assessor	Possessory Interests	yes		7 years	department preference; postponed amounts become due after certain events (sells, doesn't occupy, death, ineligible, etc.); MAD keeps track of the amounts due; GC§26202
17 Assessor	PP Daily Reports			2 years	department preference; GC§26202
18 Assessor	Preliminary Change of Ownership (PCOR): Notifications from Title Companies	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834

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19 Assessor	Property Information Management System (PIMS) Database/ (MODPIMS) Database/ (AIMS) Database	yes		Permanent	data is interrelated; GC§26202 et seq., 26205.1
20 Assessor	Property Information Management System (PIMS) Database Regular Supplemental Control Reports (on Control-D)			2 years	department preference; GC§26202
21 Assessor	Recorded Maps	yes		Permanent	current maps maintained permanently for administrative purposes; GC§26205.1
22 Assessor	Request to combine parcels	yes		7 years	department preference; Property Tax rule 135 (e)(5) allows for destruction 6 years (+3) after the lien date for the last year for which the exemption claim was active (GC§26907 -allows for +5 years if not microfilmed, etc.); GC§§26907 et seq., 26202
23 Assessor	Special Exemption Inactive Claims	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
24 Assessor	Special Properties/ Mine Production Reports	yes		7 years	department preference; GC§26202
25 State of California	State Board of Equalization (SBE & CAO) Letters (outline standards, practices, etc.)			when no longer required	non-records; GC§26202
26 Assessor	Statistics and updates			2 years	GC§26202
27 Assessor	Subventions (Agriculture/ Williamson Act)			when no longer required	copies; GC§26202
28 Assessor	Subpoenas- Assessor			7 years	department preference; GC§26202
29 Assessor	Tax Rate Change Notifications (TRA change)	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
30 Assessor	Taxpayer (TP) Letters/ Assessment Change Notices -secures or unsecured	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
31 Assessor	Taxpayer Correspondence (received from taxpayers)			2 years	GC§26202
32 LAFCO	Valuations: Annexations, etc.			when no longer required	non-records; GC§26202
33 Assessor	Vessel (Boat) and Aircraft Records/DMV Notifications, etc.	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
34 Assessor	Vessel (Boat) and Aircraft Records/DMV Notifications, etc.	yes		7 years	department preference, Assessor or Board may destroy any taxpayer's document lien date + 6 years; GC§26202, R&T§§465, 834
35 Recorder/County Clerk	Applications to view records/public records requests			2 years	GC§26202
36 See Clerk of the Board of Supervisors Records Retention Schedule	Environmental Filings/Postings- Negative Declarations, Notice of Exemptions (NOE), Notice of Determinations (NOD) (Certification and Fish and Game (CEQA) environmental filing)				
37 Recorder/County Clerk	Fictitious Business Name Statements: All records- includes original filings, withdrawal statements & abandonment of use filings, proof of publications, etc.			9 years	B&P §17927 et seq., GC§26205.1
38 Recorder/County Clerk	Grand Jury Reports		yes	Permanent	PC§933 (b)(c), GC§26202

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39 Recorder/County Clerk	Humane Officer Appointments			4 years	department preference - all appointments expire after 3 years from date of filing with the County Clerk; Corporations Code §14502, GC§26202
40 Recorder/County Clerk	Legal Document Assistant/Unlawful Detainer Assistant Registrations: applications, cash deposits, bonds, renewal cards, etc.			5 years	registrations are valid for 2 years; cash deposits are required for Registration Expiration + 3 years; B&P§§6400, 6405 (g), GC§26202
41 Recorder/County Clerk	Marriage Licenses issued, never returned as certificates			2 years	GC§26202
42 Recorder/County Clerk	Marriage Records: Confidential	yes		Permanent	may destroy original after 1 year, if on archival microfilm (send copy to State Register); FC§511
43 Recorder/County Clerk	Minor's Packets/Marriage Consent Forms: Judge's permission or parent's consent for a minor to marry			2 years	the court order is a Clerk of the Court record retained for 30 years, but as they are filed with the County Clerk must be retained for 2 years; GC§26202
44 Recorder/County Clerk	Notary Journals: delivered to the County Clerk upon expiration of term or death			10 years	GC§8209, must have a court order for destruction; date of retention is reset to 10 years if a notary journal is requested
45 Recorder/County Clerk	Notary Public Oaths			5 years	code allows for destruction after expiration + 1 year; CCP§337 et seq., GC§§8213, 26202
46 Recorder/County Clerk	Oaths of Office: Commissioner of Civil Marriages, one day			5 years	5 years after revocation of appointment; GC§24102
47 Recorder/County Clerk	Oaths of Office: Employees, probation officers, elected and appointed officials			50 years	statute of limitations: public official misconduct is discovery of offense + 4 years, retirement benefits is 6 years from last action; all "deputy" oath of offices are required for 5 years after revocation of appointment; GC§24102 (d)
48 Recorder/County Clerk	Power of Attorney Filings and Revocations (all records)			50 years	department preference; GC§§26202, 26809
49 Recorder/County Clerk	Process Server Index			15 years	department preference; GC§§26202, 26205.1
50 Recorder/County Clerk	Process Server Registrations: applications, bonds, renewals, cards, etc.	yes		15 years	department preference; GC§§26202, 26205.1
51 Recorder/County Clerk	Requests for Research, copies or duplicates (all-includes confidential marriage licenses, military service discharge records, etc.)			2 years	GC§26202
52 See Clerk of the Board of Supervisors Records Retention Schedule	Roster of Public Agencies				
53 Recorder/County Clerk	Sensitive Equipment Report Filings (cell phones, etc. pursuant to County Practice No. 11-04SP3)			5 years	meets municipal government auditing standards; GC§26202
54 See Clerk of the Board of Supervisors Records Retention Schedule	Statement of Economic Interests (FPPC 700 Series Forms): Board of Supervisors Staff, Elected and Appointed Department Heads, Assistant Department Heads, Designated County Staff and members of Boards, Commissions and Committees.				
55 State Insurance Commissioner	State Insurance Companies, Surety Companies			1 year	State keeps original; GC§§26202 et seq., 26809
56 Recorder/County Clerk	Subpoenas- County Clerk			7 years	department preference; GC§26202
57 Recorder/County Clerk	Surety Insurers List			2 years	GC§§26202, 26809
58 Recorder/Recorder	20 day preliminary notices			2 years	GC§26202
59 Recorder/Recorder	Accounts Receivable- invoices to Title Companies			2 years	Treasurer also maintains copies; GC§§24356, 26201

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60 Recorder/Recorder	Contract, Plans, Specifications, and Bonds of any Building or Improvement- Filed Documents	yes		5 years	Recorder may return originals to the filer 2 years after the filing of the notice of completion (unless there is a claim of interest), or destroy after 5 years (providing there is no claim of interest), if not returned to the filer; GC§27205
61 Recorder/Recorder	Documents Undeliverable by Mail & Uncalled for- Returned Mail			2 years	Paper records may destroy after 2 years if imaged (which all recorded documents are); GC§26205.6
62 Recorder/Recorder	Filed Documents	yes		Permanent	not public records - charter certificates, tax certificates, tax collector proof of publication; GC§26205.1
63 Recorder/Recorder	Hidden Tax Letters (not for public display)	yes		Permanent	department preference; GC§26202
64 Recorder/Recorder	Indices: All (Official Records, vital statistics, etc.)	yes		Permanent	GC§§26202, 27320-27336, 27360-27388
65 Recorder/Recorder	Letters: Problem Letters, 60-day Letters, etc.			2 years	GC§26202
66 Recorder/Recorder	Maps	yes	yes	Permanent	GC§27231-27254
67 Recorder/Recorder	Map Guarantees (from Title Companies)	yes		Permanent	department preference; GC§26202
68 Recorder/Recorder	Official Records (Deeds, Maps, Mines, Tax Liens, etc.)	yes		Permanent	originals returned to customer, retained permanently on microfilm; GC§§26202, 27320-27336, 27360-27388, 27231-27254, H&S 102330
69 Recorder/Recorder	Records destruction documentation			2 years	GC§26202
70 Recorder/Recorder	Subpoenas- Recorder			7 years	department preference; GC§26202
71 Recorder/Recorder	Undeliverable Mail/Notices from the Post Office- all			2 years	GC§§26202 et seq., 27297.5(g)
72 Recorder/Recorder	Vital Records: Birth, Death & Marriage Certificates, and related documents			Permanent	GC§§26202, 27320-27336, 27360-27388, H&S 102330
73	County Historical Archives maintains record series of a historical or permanent nature from various departments.				
74 Archives	Agriculture, Weights and Measures (Crop and Livestock reports)	yes		Permanent	GC§26202
75 Archives	Airports (annual reports, commission minutes, master plans- historical files)	yes		Permanent	GC§26202
76 Archives	Assessor Records (correspondence- establishing policy, manuals, maps, map books, reports and studies, etc.)	yes		Permanent	GC§26202
77 Archives	Auditor-Controller (budgets [final adopted], correspondence - establishing policy, audit reports and financial statements/CAFR, reports and studies, Tax Assessment Rolls and Supplemental, taxrate booklet)	yes		Permanent	GC§26202
78 Archives	Board Governed County Service Areas (Special Districts) (Annual Reports, Assessment Districts, Historical Records, Board Minutes and resolutions)	yes		Permanent	GC§26202
79 Archives	Clerk of the Board of Supervisors (agendas, correspondence, minutes, agendas, assessment districts, audit reports, County Code, Indexes to Records, resolutions, ordinances, historical records)	yes		Permanent	GC§26202
80 Archives	Coroner (coroner's inquests- historical, record books, indexes)	yes		Permanent	GC§26202

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81 Archives	County Administrative Office (Memos, Photographs, Press Releases, Public Information Materials, Speeches - Communications)			Permanent	GC§26202
82 Archives	County Clerk (articles of incorporation -historical, court cases - historical, oaths - historical, etc.)	yes		Permanent	GC§26202
83 Archives	County Schools (minutes, reports and studies, etc.)	yes		Permanent	GC§26202
84 Archives	Grand Jury (reports and comments)	yes		Permanent	GC§26202
85 Archives	Planning (correspondence - establishing policy, minutes of boards and commissions, reports and studies, etc.)	yes		Permanent	GC§26202
86 Archives	Public Works (aerial photos, dam inspections/levee maintenace, flood control- development files and drainage reports and studies, historical events, street name changes, Rainfall/Precipitation Measurements, Surface Water data)	yes		Permanent	GC§26202
87 Archives	Recorder (pre-Official Records records)	yes		Permanent	GC§26202
88 Archives	Regional Parks (annual reports, correspondence, reports and studies, county trails, master plans, photographs)	yes		Permanent	GC§26202
89 Archives	Registrar of Voters (Great Register)	yes		Permanent	GC§26202
90 Archives	San Bernardino County Fire Protection District (Annual Reports, Historical Records, Board Minutes and resolutions, Strategic and Master Plans)	yes		Permanent	GC§26202
91 Archives	San Bernardino County Flood Control District (Annual Reports, Historical Records, Board Minutes and resolutions, Strategic and Master Plans)	yes		Permanent	GC§26202
92 Archives	Sheriff (annual reports, crime statistics - annual, correspondence - establishing policy, manuals, reports and studies,)	yes		Permanent	GC§26202

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