



REVISION GUIDE

SUMMARY OF CHANGES

- Records common to all local government agencies have been removed from this schedule and now appear in the ***Local Government Common Records Retention Schedule (CORE)***.
- All records series in the County Assessor Records Retention Schedule have an “AS” prefix.
- Series with duplicate Disposition Authority Numbers (DANs) have been assigned new DANs.
- Series duplicated in more than one category now appear in only one category.
- Discontinued series have been removed.
- Four detailed indexes have been added:
 - Archival/Potentially Archival/Permanent Records
 - Essential Records
 - DANs
 - Subjects

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SERIES REMOVED FROM ASSESSOR SCHEDULE - COVERED IN CORE (with different retention periods)

All records series which originated in the LGRRS -- and which were duplicated in the County Assessor Records Retention Schedule -- have been removed. From this point forward, DANs will be unique identifiers and will appear in only one schedule.

The series whose retention periods have changed are shaded in gray and listed on the left side of the table; the current disposition authorities are shown on the right, and can be found in the CORE.

ASSESSOR Category	ASSESSOR Title and Retention P= Primary S=Secondary	CORE DAN (unchanged)	CORE Function: Activity	CORE Title and Retention P= Primary S=Secondary
Accounting - Payroll	DAILY, WEEKLY, OR MONTHLY TIME ACCUMULATION REPORTS (TIME CARDS) <i>P: If used for retirement verification – 60 years If not use for retirement verification – 3 years. See remarks S: Destroy when obsolete or superseded</i>	GS50-03E-04	Human Resource Management: Payroll	TIME CARDS/TIME SHEETS <i>P: If used for retirement verification – 60 years. If NOT used for retirement verification – 4 years – see remarks. Time records subject to federal audit should be retained per federal requirements. S: Destroy when obsolete or superseded</i>
Accounting - Payroll	SUPPORTING DOCUMENTS AND REPORTS - PAYROLL <i>P: 3 years S: Destroy when obsolete or superseded</i>	GS50-03E-25	Human Resource Management: Payroll	SUPPORTING DOCUMENTS AND REPORTS - PAYROLL <i>P: 3 years or until completion of audit S: Destroy when obsolete or superseded</i>
Administrative Records Common To All Agency Work Units	CITIZENS' COMPLAINTS/REQUESTS <i>P: 3 years S: Destroy when obsolete or superseded</i>	GS50-01-09	Agency Management: Community Relations	CITIZENS' COMPLAINTS/REQUESTS <i>P: Matter closed plus 3 years S: Destroy when obsolete or superseded</i>
Legal Counsel	LITIGATION CASE FILES <i>P: Agency Record Copy – Case closed plus 10 years S: Destroy when obsolete or superseded – Potential archival value – See Remarks</i>	GS53-02-04	Agency Management: Legal	LITIGATION CASE FILES <i>P: Agency Record Copy – Case closed plus 10 years – Potential archival value – See remarks S: Destroy when obsolete or superseded – Potential archival value – See Remarks</i>
Personnel - Affirmative Action	EQUAL EMPLOYMENT OPPORTUNITY REPORTS <i>P: 5 years S: Destroy when obsolete or superseded</i>	GS50-04C-05	Human Resources Management: Equity	EQUAL EMPLOYMENT OPPORTUNITY REPORTS <i>P: 3 years S: Destroy when obsolete or superseded</i>



SERIES REMOVED FROM ASSESSOR SCHEDULE - COVERED IN CORE (with different retention periods)

All records series which originated in the LGRRS -- and which were duplicated in the County Assessor Records Retention Schedule -- have been removed. From this point forward, DANs will be unique identifiers and will appear in only one schedule.

The series whose retention periods have changed are shaded in gray and listed on the left side of the table; the current disposition authorities are shown on the right, and can be found in the CORE.

ASSESSOR Category	ASSESSOR Title and Retention P= Primary S=Secondary	CORE DAN (unchanged)	CORE Function: Activity	CORE Title and Retention P= Primary S=Secondary
Personnel - General	RECRUITMENT FILES <i>P: 2 years</i> <i>S: Destroy when obsolete or superseded</i>	GS50-04B-22	Human Resources Management: Recruiting/Hiring	RECRUITMENT FILES <i>P: 3 years</i> <i>S: Destroy when obsolete or superseded</i>
Personnel - General	DRUG TEST RESULTS (AGENCY EMPLOYEES) <i>P: Termination of employment plus 6 years</i> <i>S: Destroy when obsolete or superseded</i>	GS50-04B-27	Human Resources Management: Personnel	DRUG/ALCOHOL TEST RESULTS - POSITIVE RESULTS OR REFUSAL TO TEST (AGENCY EMPLOYEES) <i>P: Date of results plus 5 years</i> <i>S: Destroy when obsolete or superseded</i>
Records Management	PUBLIC DISCLOSURE REQUEST FILES <i>P: Current year plus 1 year - See Remarks</i> <i>S: Destroy when obsolete or superseded</i>	GS50-09-12	Information Management: Records Management	PUBLIC DISCLOSURE REQUEST FILES <i>P: Requests and responses received through July 23, 2005 are retained for 5 years. Requests received on or after July 24, 2005 are retained for 1 year. See Remarks.</i> <i>S: Destroy when obsolete or superseded</i>



DISPOSITION AUTHORITY NUMBER (DAN) CORRECTIONS

The series listed below were assigned disposition authority numbers (DANs) which had already been assigned to other records series. The new/correct DANs are listed, and the locations of the series are noted.

Series Title	Former DAN	New DAN	Function: Activity or Category TITLE	Schedule
EMPLOYEE ASSISTANCE PROGRAM – SUPERVISOR REFERRAL DOCUMENTATION	GS50-04B-27	GS50-04B-28	Human Resource Management: Benefits EMPLOYEE ASSISTANCE PROGRAM – SUPERVISOR REFERRAL DOCUMENTATION	CORE
EXEMPTIONS LISTS	AS01-04-04	AS01-04-05	Exemptions EXEMPTIONS LISTS	County Assessor
NON-PROFIT EXEMPTIONS AND CLAIMS FILE	AS01-04-04	AS01-04-06	Exemptions NON-PROFIT EXEMPTIONS AND CLAIMS FILE	County Assessor
RECEIPTS FOR CASH RECEIVED – OFFICE REFERENCE COPIES	GS50-03A-21	GS50-03A-34	Financial Management: Accounting RECEIPTS FOR CASH RECEIVED – OFFICE REFERENCE COPIES	CORE
SENIOR CITIZENS EXEMPTIONS	AS01-04-04	AS01-04-07	Exemptions SENIOR CITIZENS EXEMPTIONS	County Assessor
SENIOR CITIZENS TAX DEFERRALS	AS01-04-04	AS01-04-08	Exemptions SENIOR CITIZENS TAX DEFERRALS	County Assessor
SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILE (p.15)	GS50-04B-30	GS50-04B-50	Human Resource Management: Performance Management SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES	CORE
SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILE (p. 47)	GS50-04B-28	GS50-04B-50	Human Resource Management: Performance Management SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES	CORE
VOLUNTEER APPLICATIONS	GS50-04B-24	GS50-04B-10	Human Resource Management: Personnel VOLUNTEER FILES	CORE



DISCONTINUED DANs – Series covered by CORE DANs

The series listed below originated in the LGRRS and were discontinued. The correct DANs are listed, and the locations of the series in the new CORE schedule are noted.

Discontinued DAN	Former Category	Former Title	Former Retention	EFFECTIVE DAN	New Category	New Title	New Retention
GS50-03E-12 05/02	Accounting – Payroll	EMPLOYEE EARNINGS QUARTERLY REPORTS	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-03E-13 05/02	Accounting – Payroll	EMPLOYEES WITHHOLDING EXEMPTION CERTIFICATES (W-4)	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-03E-14 05/02	Accounting – Payroll	EMPLOYER'S COPIES OF FEDERAL WITHHOLDING TAX STATEMENT (W-2)	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-04B-12 08/04	Personnel – General	EMPLOYEE CONTRACTS – FINAL	6 years	GS50-01-11	Agency Management: Legal	CONTRACTS, AGREEMENTS, AND WARRANTIES	Termination plus 6 years
GS50-04B-26 05/04	Personnel – General	EMPLOYEE HEALTH HISTORY FILES	Termination of employment plus 6 years	GS50-04B-30	Human Resource Management: Occupational Health and Safety	EMPLOYEE MEDICAL AND EXPOSURE RECORDS	Termination of employment plus 30 years
GS50-04B-03 06/03	Personnel – General	EMPLOYEE HISTORY	Termination plus 6 years	GS50-04B-06	Human Resource Management: Personnel	PERSONNEL FILE	Termination plus 6 years See Remarks