

County of Monterey - Information Technology

Retention Schedule

Code	Category	Description	Retention Period	Justification	Disposition	Confidential or Sensitive record
Applications						
ITDA001	Software application program and system documentation	System description, design and implementation plan, operations reference guide and runsheets, user guide, program specifications, flowcharts, record, report and screen layouts, codes and formulas, compiled program listing, including executable code when source is not available from the software vendor	Until updated + 2 years	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	Depends on the business nature of the application
Customer Service						
ITDC001	Service requests	Records on requestor, dates, priorities of incident reports and work requests, including status updates, communications and agreements between ITD and the requestor or business owners on the schedule, quality of scope of expected outcomes, as well as who worked on the request and time worked/billed.	Request closure + 2 years	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	Depends on the business nature of the request.
ITDC002	Project Management documentation	Records created during the performance of Project Management Activities for IT related projects	Project completion + 5 years	CCP 337. 343	Shred if hardcopy; delete/purge if electronic.	Depends on the business nature of the project.
Security						
ITDS001	Security Incident Data	Data Collected during security incidents.	5 yrs.	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	Yes
ITDS002	Internet Access Records	Records of Employee Internet Usage	CY + 2 years	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	Yes
Accounting						
ITDA001	Budget / Methodology	Documentation to support rate structures used for billing / auditable by State	FY + 5 yrs	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	No
ITDA002	Customer Billing documentation	All billing documentation that supports data entered into Advantage, (the County system of record). This pertains to all information that originates and is maintained within internal ITD systems. Information is needed through Receivables.	After payment, + 5 yrs	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	No
ITDA003	Capital Improvement documentation	This covers both expenditure and revenue tracking for all ITD CIP, from budget / approval through to billing / allocation of costs to customers, external funding, and reconciliation.	FY + 5 yrs	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	No
Cable Franchise						

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ITDF001	Cable / Franchise Fee documents	All original agreements / correspondence as these provide support documentation for revenue received.	Expiration of Contract, + 5 yrs	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	Yes
FCC License						
ITDFC01	FCC License Files	Applications, renewals, correspondence, Current FCC License Audit Documents.	AS long as Installation is Licensed + 5 Years	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	No
TBD	Radio Related Agreements	Original and/or imaged Radio Frequency Cooperative User Agreements	Term of Agreement and 7 years after final payment	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	No
Procurement						
ITDP001	IT Equipment Leases	Lease Supplements For County Agencies	Term of Lease + 2 Years	GC§ 26907	Shred if hardcopy; delete/purge if electronic.	No
Radio Shop						
ITDR001	Radio Microwave Site Files	Permits and/or leases for radio and microwave installations	As long as installation is Licensed	CCP 337.15 GC§ 26907	Shred if hardcopy; delete/purge if electronic.	No
Miscellaneous						
ITDM001	Equipment Records	County Equipment Records (Warranty Info, Instructions Configuration Records, Repair/Upgrade History	Until Obsolete	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	No
ITDM002	Drawings	Infrastructure mapping relating to Network, Telecom, Site, and Microwave data. These not only relate to current usage, but also provide support documentation for billing - current and past due	Until Obsolete + 5 yrs	GC§ 26202	Shred if hardcopy; delete/purge if electronic.	Yes