

## Records Management

### 800.1 PURPOSE AND SCOPE

This policy provides guidelines for the management of all district documents, including those in fire stations, to ensure that district records are maintained and available as needed. This policy also provides guidance on the retention, disposition and security of records.

### 800.2 POLICY

It is the policy of the Fresno County Fire Protection District to promote the efficient and cost-effective conduct of district business by reducing the number of records in active file areas, eliminating unnecessary retention of duplicate or obsolete documents and providing for timely transfer of inactive files in compliance with legal requirements.

### 800.3 CUSTODIAN OF RECORDS

The Fire Chief shall appoint a Custodian of Records, who will oversee the records management program, including the records retention schedule. The Custodian of Records or the authorized designee should:

- (a) Remain familiar with the California Secretary of State Local Government Records Management Guidelines.
- (b) Identify what records the District has, where the records are kept, the volume and how the records are used.
- (c) Maintain and update the district's records retention schedule, including:
  - (a) Preparing any amendments to the schedule and obtaining the necessary approvals for the amendments.
  - (b) Coordinating with the District board clerk to ensure all district records are properly classified and that the retention periods are appropriate for each document.
  - (c) Maintaining a current version of the district's records retention schedule and making it available to members for reference.
- (d) Coordinate the placement of inactive records in storage, including:
  1. Maintaining a storage inventory.
  2. Providing an annual reminder to Division Chiefs and section managers to review files to determine if any records should be transferred to storage.
- (e) Manage the destruction of district records, including:
  1. Annually reviewing the records retention schedule and storage inventory list to determine which records are eligible for destruction.
  2. Providing a list to Division Chiefs and section managers of records eligible to be destroyed.
  3. Obtaining any required approvals for the destruction of eligible records.

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4. Maintaining a list of records that have been destroyed.
- (f) Ensure confidential and other sensitive records are stored or maintained to protect the sensitive nature of the records.
  - (g) Process subpoenas and requests for records as provided in the Subpoenas, the Release of Records and Public Records Act and the Patient Medical Record Security and Privacy policies.
  - (h) Manage a document imaging or other process for bulky or rarely accessed records with long retention periods.
  - (i) Establish rules regarding the inspection and copying of district records as reasonably necessary for the protection of such records, including:
    1. Identifying records or portions of records that are confidential under state or federal law and not open for inspection or copying.
    2. Maintaining a schedule of fees for public records as allowed by law.
  - (j) Determine how the district website may be used to post public records in accordance with Government Code § 6253.
  - (k) Ensure that public records posted on the district website meet the requirements of Government Code § 6253.10 including, but not limited to, posting in an open format where a record may be retrieved, downloaded, indexed and searched by a commonly used internet search application.
  - (l) Ensure that a list and description, when applicable, of enterprise systems (as defined by Government Code § 6270.5) is publicly available upon request and posted in a prominent location on the district website.

### **800.4 MEMBERS' RESPONSIBILITY**

All members are expected to handle district records in a responsible manner and as provided in this policy.

Members are responsible to ensure that records in their control are maintained as provided in the records retention schedule.

### **800.5 SUPERVISORS' RESPONSIBILITIES**

Supervisors at fire stations are responsible for the management of records at the fire station level. The supervisors shall ensure that all records at the fire stations are retained in accordance with this policy.

### **800.6 TRAINING**

The Custodian of Records should coordinate with the Training Chief to provide training regarding the records management program to the appropriate district members.