CHAPTER 1 INDEX

This chapter provides background on the purpose of the State Administrative Manual (SAM); and discusses how to access, use, revise, and maintain SAM; and discuses Management Memos. Additionally, the reader is directed to specific departments and contacts that have jurisdiction over SAM content.

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PURPOSE AND CONTACTS **0001**
(Revised 09/02)

The SAM is a reference source to statewide management policy. A list of the authoring department and the contact telephone number for each SAM section is contained in SAM Section 0030. Telephone the program contact person directly to: (1) request Internet information, (2) request listed publications, and (3) for content questions about SAM sections. If you have additional questions or comments regarding the SAM, telephone the SAM Unit, at (916) 327-8908, CALNET 467-8908. You can also forward comments electronically at: **samunit@dgs.ca.gov.**

AUTHORITY **0005**
(Revised 09/02)

The SAM was created in 1953 by the Department of Finance (DOF) to provide management communication among state departments. On July 31, 1990, SAM responsibility was officially transferred from DOF to the Department of General Services (DGS). Presently, this program is located within, DGS' Office of State Publishing (OSP), Administrative/SAM Unit. The DGS is delegated the responsibility of developing and providing a centralization of business management functions and services of the state. The SAM communicates major policy related to this responsibility.

ACCESS TO SAM **0010**
(Revised 09/02)

Paper SAM

Contact the SAM Unit for information on how to purchase a paper SAM and subscription to SAM revisions.

SAM at Libraries

The State Library Government Publications Desk (located within Sacramento) and Complete Depository Libraries (located within metropolitan areas of California) have paper copies of SAM that are available for public use. Contact the SAM Unit for library addresses.

SAM on Internet

The SAM is available free on the Internet at: **http://www.dgs.ca.gov**. Its query feature can help locate SAM topics.

SAM ARRANGEMENT **0015**
(Revised 09/02)

The SAM contains the following major parts:

1. SAM Revision Log (OSP 120). This is a SAM revision package log.
2. Foreword. Contains opening statement by DGS Executive Director.
3. Table of Contents. Lists all chapters and sub chapters.
4. SAM Subject Index. Assists in locating SAM topics.
5. SAM Chapters. Each chapter is listed in the Table of Contents.

REVISING SAM **0020**
(Revised 09/02)

Responsibility for Revising SAM

Responsibility for updating SAM content is assigned to authoring state departments. The SAM Section 0030 lists authoring departments for each SAM section and provides telephone numbers of individuals who can direct SAM Users to authors to assist with content information. The departmental director or his/her designee is responsible for certifying that any revisions to their SAM sections are legal and consistent with overall state policies.

Anyone can recommend revisions to SAM. To recommend SAM revisions, contact the author's office listed in SAM Section 0030 or contact the SAM Unit. When the author determines that SAM revisions are necessary, the SAM Unit can provide process information and timetables. The author may designate an author contact to write and coordinate revisions through the SAM Unit.

SAM Revision Packages

Revisions to SAM are distributed to agencies via a revision package issued by the DGS Executive Director. Contact the SAM Unit to inquire about SAM revision dates. SAM revision packages contain the following information:

1. Cover and Back Sheets. These sheets contain the mailing label and identify the revision package.

2. Cover Letter. Transmits general information about the revision package.

3. Revision Summary. This document contains a summary of the revisions to each SAM chapter being revised.

4. Revision Sequence Instructions. This document contains manual updating instructions. It explains the location and number of pages to be removed and inserted.

5. New and Revised SAM Pages. Each new and revised page of SAM is provided in numerical order. Page numbers reflect the first section of each page.

Often, the margin on revised pages contains vertical and horizontal bars. Vertical bars on pages indicate additions or overall changes, and horizontal bars indicate deletions. Revised pages in chapter rewrites do not contain bars. Section and subsection titles in the text are followed by information indicating whether the section is new, revised, or renumbered.

MANAGEMENT MEMOS **0025**
(Revised 3/14)

The Governor's Office (GO), California Department of Technology (CalTech), Department of Finance (DOF), Department of General Services (DGS), and California Department of Human Resources (CalHR) issue SAM Management Memos to disseminate information directly related to SAM requiring immediate attention. A Management Memo is signed by the issuing departmental director. Generally, Management Memos expire within 12 months from the issue date. Management Memos are distributed to SAM subscribers and departmental headquarters offices. Active Management Memos may be accessed on the Internet at: **http://www.dgs.ca.gov**.

A department which wants to develop a Management Memo should contact the SAM Unit to ensure that the Management Memo process is the appropriate communications vehicle. The SAM Unit can consult in the Management Memo process and alternative processes.

SAM PUBLICATIONS AND CONTACTS **0030**
(Revised 3/14)

The following chart lists publications cited in SAM which are available through the program. Telephone the program contact person directly to: (1) request Internet information, (2) request listed publications, and (3) for content questions about SAM sections.

SECTION NUMBERS & CHAPTER TITLE	DEPT./ PROGRAM	INTERNET & PUBLICATIONS CITED & AVAILABLE THROUGH PROGRAM	CONTACT & PHONE
0001-0030 Introduction	General Services, Office of Strategic Planning, Policy and Research	Isaac.clark@dgs.ca.gov State Administrative Manual (SAM) http://www.sam.dgs.ca.gov	Isaac Clark III (916) 376-1862
		jason.tyburczy@dgs.ca.gov	Jason Tyburczy (916) 376-5069
		kam.langham@dgs.ca.gov Management Memos (MM)	Kam Langham (916) 376-5068
0100-0110 General	General Services, Administration Division		Deputy Director (916) 376-5024
0130-0170 General	Finance, Budget Operations Support	http://www.dof.ca.gov/	(916) 322-5540
0180 General	General Services, Administration Division		Deputy Director (916) 376-5024
0190-0192 General	California Department of Human Resources (CalHR)	Steve.caldwell@calhr.ca.gov	Steve Caldwell 916-323-4411
0200-0211 Governor's Office	Governor's Office, Constituent Affairs	Adrian.mata@gov.ca.gov	Adrian Mata 916-322-7478
0400-0422.1 Exempt Personnel	California Department of Human Resources (CalHR)	Debbie.Baldwin@calhr.ca.gov	Vanessa Singh 916-322-4028
		Vanessa.singh@calhr.ca.gov	
0500-0580 Advertising	General Services State Publishing	Noel.Soliz@dgs.ca.gov Advertising Program Guidelines http://www.dgs.ca.gov/osp	Noel Soliz Printing Process Operations Supervisor (916) 322-2373
0700-0750 Travel	California Department of Human Resources (CalHR)	Ray.Asbell@calhr.ca.gov	Ray Asbell (916) 324-0526
0751-0752 Travel	General Services, Risk & Insurance Management	Isabel.Cortez@dgs.ca.gov	Isabel Cortez-Raj (916) 376-5297
0753-0780 Travel	California Department of Human Resources (CalHR)		
0900-0911 Grants	Governor's Office, Planning & Research	Scott.morgan@opr.ca.gov	916-322-2318

SECTION NUMBERS & CHAPTER TITLE	DEPT./ PROGRAM	INTERNET & PUBLICATIONS CITED & AVAILABLE THROUGH PROGRAM	CONTACT & PHONE
0912 Grants	Finance, Budget Operations Support	http://www.dof.ca.gov/	(916) 322-5540
1100-1107 Statewide Planning	Governor's Office Planning & Research	Scott.morgan@opr.ca.gov	916-322-2318
1200-1233 Contracts	General Services, Legal Services	http://www.dgs.ca.gov/ols State Contracting Manual	Kathleen Yates (916) 376-5115
1300-1335 Real Estate Services Division	General Services Real Estate Services Division	Mary.dupont@dgs.ca.gov	Mary Dupont 916-376-1902
1450-1452.3 Division of the State Architect		Dale.kuroda@dgs.ca.gov	Dale Kuroda 916-322-0600
1600-1654 Imaging & Records Management	General Services, OSP, CalRIM	http://www.dgs.ca.gov/pd	Ramona Gutierrez (916) 322-1728
1661-1695 Imaging & Records Management	General Services, OSP, CalRIM	http://www.dgs.ca.gov/pd Records Retention Handbook Addendum to Records Retention Handbook	Ramona Gutierrez (916) 322-1728
1700-1750 Forms Management	General Services, State Publishing	Dave.dickey@dgs.ca.gov	Dave Dickey (916) 322-0211
		Jeff.walker@dgs.ca.gov	Jeff Walker 916-324-9697
		http://www.dgs.ca.gov/osp	
1900-1960 Waste Prevention and Recycling of Non-Hazardous Waste	Cal Recycle	Sue.ingle@calrecycle.ca.gov	Sue Ingle 916-341-6518
		Gregory.dick@calrecycle.ca.gov	Gregory Dick 916-341-6489
		http://www.calrecycle.ca.gov	
2400-2482 Insurance & Surety Bonds	General Services, Risk & Insurance Management	Isabel.cortez@dgs.ca.gov	Isabel Cortez-Raj (916) 376-5297
		Karen.bianchini@dgs.ca.gov	Karen Bianchini 916-376-5280
2580-2590.2 Worker's Comp.	California Department of Human Resources (CalHR)	Becky.Bayliss@calhr.ca.gov	Becky Bayliss 916-322-1360

SECTION NUMBERS & CHAPTER TITLE	DEPT./ PROGRAM	INTERNET & PUBLICATIONS CITED & AVAILABLE THROUGH PROGRAM	CONTACT & PHONE
2591 Worker's Comp. (Asbestos Notification)	General Services Real Estate Services Division	Mary.dupont@dgs.ca.gov	Deputy Director (916) 375-4150 Mary DuPont 916-376-1902
2800-2820 Publishing/Printing	General Services, State Publishing	danelle.hamilton@dgs.ca.gov http://www.dgs.ca.gov/osp	Danelle Hamilton (916) 327-5867
2825 Publishing/Printing	General Services, State Publishing	Noel.Soliz@dgs.ca.gov Advertising Program Guidelines http://www.dgs.ca.gov/osp	Noel Soliz Printing Process Operations Supervisor (916) 322-2373
2850-2865 Publishing/Printing	Prison Industry Authority Legal Office	Kelly.condon@calpia.ca.gov	Kelly Condon 916-358-4302
2870-2880 Publishing/Printing	General Services, State Publishing	Jerry.hill@dgs.ca.gov http://www.dgs.ca.gov/osp	Jerry Hill State Printer (916) 445-5680
3100-3140 Publications and Documents	California State Library	bill.riddle@library.ca.gov	Bill Riddle (916) 376-3974
3151 Publications and Documents	General Services, State Publishing	http://www.dgs.ca.gov/osp	Marta Bibica (916) 322-2081
3400-3440.20 Financed Acquisitions	General Services, Procurement	patrick.mullen@dgs.ca.gov	Patrick Mullen (916) 375-4617
		Debra.neisen@dgs.ca.gov	
		http://www.dgs.ca.gov/pd/home.aspx	
3500-3515 3522.1-3574.6 Purchases	General Services, Procurement	http://www.dgs.ca.gov/pd	Kristopher Bianchini 916-375-4354
		Kristopher.bianchini@dgs.ca.gov	
3520-3522 Purchases		Steve.paul@dgs.ca.gov	Steve Paul 916-928-2183
3700-3760 Lease/Purchase Equipment	General Services, Procurement	Patrick.mullen@dgs.ca.gov http://www.dgs.ca.gov/pd	Patrick Mullen (916) 375-4617

3800-3885 Transportation Management	General Services Procurement, Transportation Management Unit	http://www.dgs.ca.gov/pd/programs/transportation.aspx Robert.ullrey@dgs.ca.gov	Robert Ullrey (916) 375-4431

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SECTION NUMBERS & CHAPTER TITLE	DEPT./ PROGRAM	INTERNET & PUBLICATIONS CITED & AVAILABLE THROUGH PROGRAM	CONTACT & PHONE
4100-4118 Transportation Services	General Services, Fleet Administration	Office of Fleet And Asset Management State Fleet Handbook cecilia.perezdunn@dgs.ca.gov brent.jamison@dgs.ca.gov	Cecilia Perez-Dunn 916-376-3975 Brent Jamison 916-928-9863
4500-4555 Telecommunications	California Technology Agency	http://www.cta.ca.gov/PSCO/index.html Public Safety Communications Office Stevens.colin@state.ca.gov	Stevens Colin (916) 657-9454
4700-4705 Merit Award Program	Personnel Administration, Merit Award Bd.	Scott.kingsbury@calhr.ca.gov	Scott Kingsbury 916-324-4660
		Kari.ehrman@calhr.ca.gov	Kari Ehrman 916-324-0522
4800-5180 Information Technology	California Department of Technology	ITPolicy@State.ca.gov	Policy Officer Manveer Bola (916) 403-9624
5200-5291 Information Technology	Department of General Services, Procurement	http://www.dgs.ca.gov/pd	Bernard Quinn 916-375-4360
		Bernard.quinn@dgs.ca.gov	
5300-5399 Information Security	California Technology Agency, Office of Information Security	http://www.cio.ca.gov/	Manveer Bola 916-403-9624
		Manveer.bola@state.ca.gov	
5901-5953 Information Technology	General Services, Office of Fleet & Asset Mgmt	cecilia.perezdunn@dgs.ca.gov	Cecilia Perez-Dunn 916-376-3975
6000-6680 Budgeting	Finance, Budget Operations Support	http://www.dof.ca.gov/	(916) 322-5540
		Jennifer.nelson@dof.ca.gov	
6700-6780 Budgeting Information Technology	Finance, Information Consulting Unit	Susan.davisjames@dof.ca.gov	Susan Davis-James (916) 445-1777 Ext. 3238
6801-6899 Capital Outlay	Finance, Capital Outlay	Brian.Dewey@dof.ca.gov	Brian Dewey (916) 445-9694 Ext. 2233
6900-6965 Budgeting	Finance, Budget Operations Support	http://www.dof.ca.gov/	(916) 322-5540
7110-8535 Accounting/Fiscal Procedures	Finance, Fiscal Systems and Consulting Unit	fscuhotline@dof.ca.gov	FSCU Hot Line (916) 324-0385 CALNET 454-0385

SECTION NUMBERS & CHAPTER TITLE	DEPT./ PROGRAM	INTERNET & PUBLICATIONS CITED & AVAILABLE THROUGH PROGRAM	CONTACT & PHONE
8536-8537 Accounting/Fiscal Procedures	California Department of Human Resources (CalHR)	Becky.bayliss@calhr.ca.gov	916-322-1360
8538-8778 Accounting/Fiscal Procedures	Finance, Fiscal Systems and Consulting Unit	fscuhotline@dof.ca.gov	FSCU Hot Line (916) 324-0385 CALNET 454-0385
8780-8780.2 Accounting/Fiscal Procedures	California Department of Human Resources (CalHR)	Becky.bayliss@calhr.ca.gov	916-322-1360
8785-19464 Accounting/Fiscal Procedures	Finance, Fiscal Systems and Consulting Unit	fscuhotline@dof.ca.gov	FSCU Hot Line (916) 324-0385 CALNET 454-0385
20000-20090 Auditing of State Agencies	Finance, Office of State Audits & Evaluations	Rick.Sierra@dof.ca.gov	Rick Sierra (916) 322-2985 Extension 3103 CALNET 492-2985