

## SAM—RECORDS MANAGEMENT

### ROLE OF THE STATE ARCHIVES DIVISION - CALRIM

1606

(Revised 6/2015)

The State Records Management Act identified in SAM Section 1602 requires the State Archives Division - [CALRIM](#) to:

1. Establish standards and procedures to carry out the records management program.
2. Help agencies to:
  - a. Develop record series to account for forms, reports, correspondence, directives, files, as well as records in other formats, such as electronic media.
  - b. Develop record series to manage retention and disposition of records: either transfer to the State Archives or disposal of records.
3. Develop general retention guidelines for records that are common to most state agencies.
4. Approve schedules that meet the records management and archives policies, procedures, regulations, and guidelines established by SAM and the Records Management handbook Receive notification when new departmental offsite storage facilities other than SRC will be used.
5. Oversee the transfer of custody of records when a function or program ends.
6. Provide records management consultation and training including:
  - a. Handling of active, semi-active and inactive records
  - b. Best records management practices, available guidelines, and legal requirements.
  - c. Records inventory, scheduling and disposition
  - d. Appropriate retention periods
7. Provide guidance and assistance to agencies on requests to purchase or rent destruction, filing, or imaging equipment.
8. Perform periodic on-site audits of agency records management programs.