



Records Management Team Designation Form

Agency Name		
Manager Responsible For The Records		
Name (Last, First, Middle Initial)	Title	
Division/Branch/Section	Phone Number	Email
Signature	Date	

Coordinator Information		
Records Management Coordinator (RMC) Records Management Assistant Coordinator (RMAC)		
Name (Last, First, Middle Initial)	Classification	
Division/Branch/Section	Phone Number	Email
Signature	Date	

Please return this completed form to CalRIM via e-mail to CalRIM@sos.ca.gov.

Designation of **Records Management Coordinator (RMC)** is required to certify that the agency is in compliance with the **Records Management Act** and [Section 1600](#) of the **State Administrative Manual (SAM)**. **Records Management Assistance Coordinators (RMAC)** can be additionally designated by the agency to assist the RMC with their duties.

Agency Records Management Program

[Government Code Sections 12270-12279](#), in conjunction with the rules, regulations, and standards and procedures issued by the Secretary of State, requires the head of each state agency to:

- a. establish and maintain an active, continuing program for the economical and efficient management of the records and information practices of the agency;
- b. identify records essential to the functioning of state government in the event of a major disaster; and
- c. when requested by the Secretary of State, provide a written justification for storage or extension of records in the State Records Center for a period of 50 years or more. Records deemed to have archival value will be transferred to the State Archives.

RMC duties may include:

- Coordinating the agency records management program.
- Coordinating and conducting a regular records inventory in conjunction with management and designated Records Management Assistant Coordinators (RMAC).
- Scheduling training for records management personnel.
- Conducting research into records retention requirements.
- Reviewing and approving Records Retention Schedules (RRS) prior to submission to CalRIM.
- Tracking and maintaining the RRS to ensure current approval status.
- Transferring records to and from the State Records Center (SRC).
- Reviewing and approving quarterly destructions notices from the SRC.
- Contacting the State Records Appraisal Program (SRAP) prior to the disposition of records with possible historical value (see STD 73 – Column 39).
- Ensuring the regular disposition of records (electronic and paper) not stored at the SRC. This includes transferring records to the State Archives or the SRC, as well as destruction of records by a contracted vendor or at the Document Destruction Center (DDC).
- Witnessing or designating a witness to monitor the destruction of confidential records by a contracted vendor.
- Disseminating announcements of records management activities.
- Attending CalRIM Records Management Coordinators Semi-Annual meetings.
- Responsibility for reports, written justifications, or any other records management program documentation requested by CalRIM and/or SRAP.
- Coordinating with administration, legal, and information technology units to ensure record policies and procedures are properly applied.

Frequently Used Forms

- [STD 70 Records Inventory Worksheet \(PDF\)](#)
- [STD 71 Records Transfer List \(PDF\)](#)
- [STD 73 Records Retention Schedule - cover page \(PDF\)](#)
- [STD 73 Records Retention Schedule - page 2 \(XLSX\)](#)
- [DGS SRC 50 State Records Special Authorization \(PDF\)](#)
- [Sample certificate for micrographic reproduction \(PDF\)](#)