



**Agency/Department Name:**

**Division/Unit:**

**Address:**

**Transfer List Number:**

**Volume Transferred:**

**Retention Schedule Approval Number:**

**Restrictions on Access:** If to the best of your knowledge, there are no statutes, codes, regulations, or Attorney General Opinions restricting full public access to the records listed above, CHECK HERE. ☐

**Legal Citations:** For records containing exempt or restricted material, provide the full citation for all other statutes, codes, regulations, court rulings, and/or Attorney General Opinions that restrict access to the records. (Attach addendum if more space is needed to explain.):

**Description of Restrictions:** Describe which files contain material restricted or exempted from public disclosure or how material is segregated.

**NOTE:** Under California Government Code section 12237, after January 1, 2005, all items 75 years old or older that are on deposit in the State Archives shall be accessible to the public.

State of California - Secretary of State  
**State Archives Records Transfer Agreement**  
CSA-TL-01 (Rev. 2/2023)  
**Terms of Agreement**



The agency hereby transfers the records listed below to the custody of the California State Archives with the understanding that the records will become and remain the property of the California State Archives and shall be stored, referenced and managed in accordance with the applicable laws, regulations, policies and procedures of the California State Archives, and the instructions of the State Archivist. Furthermore, the State Archivist may destroy or otherwise dispose of any of the transferred documents as permitted by law.

The transferring agency certifies that the applicable retention period(s) for the records listed below have been met and that the records have been in the transferring agency's custody for the duration of their existence. The transferring agency further certifies to the best of its knowledge that the records listed below are authentic records that have not been altered in any way and that all restrictions on the use or public disclosure of the listed records are clearly set forth and attached to this agreement. The State Archivist may decline the transfer of the records if any of the above terms have not been met or if the transfer documentation is not complete.

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By typing my name here, I acknowledge the Terms of Agreement and approve the listed records to be transferred to the State Archives.

Manager Responsible for Records:

Work Email: \_\_\_\_\_ Date \_\_\_\_\_

Agency Records Management Coordinator:

Work Email: \_\_\_\_\_ Date \_\_\_\_\_

Archives Use Only		Accession Number:	
Records Received By:		Title:	Date:

**State of California - Secretary of State  
State Archives Records Transfer Agreement  
CSA-TL-01 (Rev. 2/2023)**

[illegible]

[illegible]

**State of California - Secretary of State  
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[illegible]

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### How to Complete the Records Transfer Agreement (CSA-TL-01)

Use the instructions below in completing the State Archives Records Transfer Agreement when preparing records to be sent to the California State Archives. Use the STD. 71 Records Transfer List form for records sent to the State Records Center. For questions about transferring records to the State Archives or use of this form, contact the State Records Appraisal Program at [SRAP@sos.ca.gov](mailto:SRAP@sos.ca.gov).

**Department:** Enter Department or Agency name.

**Division/Unit:** Enter departmental unit name transferring records.

**Address:** Enter address of departmental unit transferring records.

**Transfer List Number:** (Optional) Enter department supplied Transfer List Number if using for transfer.

**Volume Transferred:** Enter total volume transferred. For paper records, use cubic feet (equivalent to one records storage box).

**Restrictions on Access:** Place "X" in box if all records in this transfer will be immediately available to the public. If records do contain legal restrictions, then describe them in Legal Citations and Descriptions of Restrictions.

**Legal Citations:** Enter specific legal citations that restrict or limit access to records within this transfer. For Public Records Act exemptions, cite specific code section(s) identify the exemption. For example: Records containing Attorney-Client Privileged material are exempt from disclosure, per Government Code section 7927.705 (formerly 6254(k)).

**Descriptions of Restriction:** Describe how restricted material is found within the records. State, for example, if all records are restricted, which files contain restricted records, if restricted information has been segregated or redacted, or how restricted information can be identified.

**Manager Responsible for Records:** Name of unit manager responsible for records.

**Work Email:** Email of Manager Responsible for Records.

**Date:** Date Acknowledging Terms of Agreement.

**Agency Records Management Coordinator:** Name of records management coordinator.

**Work Email:** Email of Records Management Coordinator.

**Date:** Date Acknowledging Terms of Agreement.

**File Size (In GBs):** Enter the size of the folder, in gigabytes.

**Folder Title / Record Series:** Enter name of folder and corresponding Record Series Title, if different. Title should correspond with Records Retention Schedule. Include subfolders or other specific contents descriptions if pertinent.

**Date Range:** Enter the year or range of years covered by the records.

**Restricted Records Present? Y/N:** If a box or folder contains restricted records (e.g. social security numbers, medical records, and other confidential, personally identifiable, protected, non-disclosure, and/or non-public information), then enter a "Y" indicating "yes" in the box. If the records in a box or folder are open and unrestricted, then enter an "N" indicating "no" in the box.

**Description of Restricted Records:** If you answered yes to question 20 and restricted records are included in a box or folder, then describe those records here. Give the record restriction code citation that applies to these records. Note if the restricted records are separated from the unrestricted records. If restricted records are separated, then where are they located within the box? If the restricted records have not been separated and are mixed with unrestricted records, then describe how restricted records can be most easily recognized and identified.

**RRS Item Number:** Enter the Item Number (column 37) for these records from the Records Retention Schedule.