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COUNTY/LOCAL RECORDS MANAGEMENT **RECORDS CUSTODIAN NEWSLETTER**

CTY@IARA.IN.GOV; WWW.IN.GOV/IARA

December 2025

Thank you for reading the November bulletin!

Last Month's Bulletin

In the November 2025 bulletin, discussion topics included the RIM Orientation Packet, Dec 10th: Combined November & December Teams Chat, LIB Retention Schedule Updates Recording, Instructions Updated!, and the Topic of the Month was Working with Vendors on your Public Records.

To view the previous' years' worth of email bulletins, see the [RIM Bulletins Archive](#) webpage.

RIM Orientation Packet!

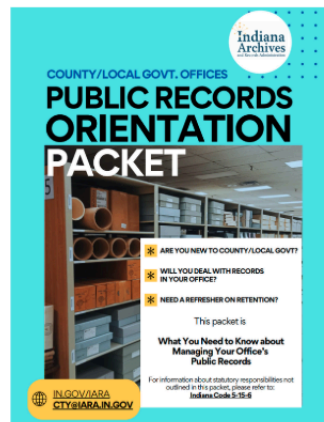
The Records & Information Management Orientation Packet is designed for

- new employees,
- those who deal with records in their office, and
- if you need a refresher on records and information management.

This packet is a condensed version of the County/Local Records Custodian Handbook.

Want to Give Feedback?

If your county/local government office has any constructive criticism or feedback on the Packet that will help us improve it, please email cty@iara.in.gov.



Dec 10th: Combined November & December Chat

Due to the holidays at the end of November & December, instead of hosting the regularly scheduled Teams Chats the last Wednesday of those months at 11 a.m., IARA will host a combined Chat on December 10th. Please be mindful of this change. We will discuss both the November & December bulletins.

2026 List of Monthly Teams Chats

Almost always held on the last Wednesday of the month at 11 a.m. eastern on Microsoft Teams, the 2026 Monthly RIM Teams Chats for County/Local Offices will be:

January 28
February 25
March 25
April 29
May 27
June 24
July 29
August 26
September 30
October 28
Combined Nov & Dec: December 9 (2nd Wednesday)

GEN Retention Schedule Updates

Here are the updates to the County/Local General (GEN) Retention Schedule, please review the Record Series Update Overview as well.

Amended descriptions: GEN 20-01, GEN 23-07, GEN 10-11, GEN 10-25, GEN 10-26, GEN 20-03, GEN 23-06

Amended description & retention: GEN 10-27 & GEN 10-41

Amended title & description: GEN 10-16

GEN 10-16	EMPLOYEE EARNING RECORD Applies ONLY to Form 99B (Employee's Earnings Record), or substitute formats containing the same information: records that document the work and earnings history of an individual employee. This form is prescribed and explained in the Indiana State Board of Accounts <i>Accounting And Uniform Compliance Guidelines Manual</i> . For all other payroll records including Form 99A (Employee's Service Record) and 99C (Employee's Weekly Work Period Earnings Record), use Record Series GEN 10-11.	PERMANENT. See Retention Schedule Instructions for format and transfer options.
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New item: GEN 25-01

GEN 25-01	ASSET LEDGERS Applies ONLY to Form 369 (General Fixed Asset Account Group Ledgers) and Capital Assets Ledgers, a log of all general fixed or capital asset accounts by a governmental unit.	PERMANENT. See Retention Schedule Instructions for format and transfer options.
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IARA Website Updates are Live!

The IARA website updates improve navigation and streamline access to key resources for both state agencies and local offices. The Services for Government section was reorganized and the Records and Information Management page is an especially helpful area. It clearly outlines the support available and provides direct access to key tools and guidance. We encourage you to explore the new layout. If you have any questions or need help finding something, please don't hesitate to reach out to cty@iara.in.gov.



Attention Clerks: Breath Test Instruments & Operator Certifications

I spoke with Dana Bors with ISDT (Indiana State Dept. of Toxicology) and they confirmed that their agency retains those certifications and that county offices no longer need to retain any copies. Forward requests for these certificates to the ISDT computer database found here: <https://recert.isdt.in.gov/>

For the copies in your office(s), you can destroy these records whenever, no form needed.



Topic of the Month: AS/AU/TR Retention Schedule Updates

In November, the OCPD approved the updates to the Assessing Officials, County Auditor, and the County Treasurer.

Assessing Officials: amended descriptions on three (3) Record Series: AS 12-05, AS 12-08, & AS 12-13

County Auditor: Streamlined retention period language, amended descriptions, added one (1) new item, and deactivated a record series.

- **Amended description and retention:** AU 10-01, AU 10-03, AU 10-05
- **Amended description:** AU 10-06
- **Amended retention:** AU 14-01, AU 10-12, AU 10-13
- **Deactivation:** AU 10-10 to GEN 10-25
- **New Record Series:** AU 25-01

AU 25-01	TAX RECORDS – PROPERTY TRANSFERS Real Estate valuation and transfer cards or similar books that document the change in ownership for property taxation purposes.	DESTROY after ten (10) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.
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County Treasurer: Streamlined retention period language, amended descriptions, and added three (3) new items.

- **Amended retention:** TR 10-01, TR 22-01, TR 22-02
- **Amended description:** TR 10-02
- **Amended description and retention:** TR 10-06
- **New Record Series:** TR 25-01, TR 25-02, TR 25-03

TR 25-01	INNKEEPER'S TAX A county tax on the rental of rooms and accommodations for periods of less than thirty (30) days and is applied in addition to state sales tax. Consult IC 6-9-29-5 for more information.	DESTROY after ten (10) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.
TR 25-02	INHERITANCE TAX State tax imposed on an individual's right to receive assets from a deceased person's estate. No longer created after the repeal of 45 IAC 4.1 in 2013; it is obsolete as of January 2023 when the last remaining records reached their disposition date.	DESTROY after ten (10) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.
TR 25-03	PROPERTY TAX REMITTANCE COUPONS Records may include but are not limited to SF 53569 (Property Tax Statement), Form TS 1-A, or their substitutes.	DESTROY after six (6) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.

Combined November & December Record Custodians Chat

Our next Records Custodians Chat will be happening on December 10th.

Meeting Information

Date: December 10th
Time: 11 a.m. to 11:30 a.m. EST
Place: Microsoft Teams

About the Meeting

This 30-minute meetup is an informal setting in which to ask questions or talk about records management concerns; normally I'll begin by introducing any IARA colleagues attending, talk a bit about the topic of the monthly bulletin and make any announcements, then open things up for questions and discussion. There will be an agenda sent out via email the morning of the meeting.

Adding Yourself to the Meeting Invite List

Desktop Outlook

- Save the attached [ics Outlook meeting file] file to your desktop.
- Make sure Outlook is open.
- Double-click the .ics file.
- Outlook will open it up as a traditional meeting invitation.
- Click "Accept" to add it to your calendar.
- Because this meeting is recurring, you should never have to add yourself again.

Outlook on the Web

- Save the attached [.ics Outlook meeting file] file to your desktop.
- In your web version of Outlook, go to the Calendar page.
- Choose "Add Calendar," then in the left pane, "Upload from file."
- Click "Browse" and find the .ics file, then click "Open."
- Choose a preferred calendar from the dropdown list. (Even if you only have one.)
- Click "Import."
- Outlook will add the meeting to your calendar.
- Because this meeting is recurring, you should never have to add yourself again.

Meeting-Up in MS Teams

Are you new to using Microsoft Teams? No worries, IARA can help you navigate.

MS Teams is a collaboration app that many state agencies are now using to stay organized and have conversations with colleagues inside and outside of the agency.

But if your agency doesn't use Teams? No worries. You don't need to have the software installed on your computer to participate in a Teams call.

To Join the Meeting By Phone

1. Dial **[your meeting number]** at the designated meeting me, then enter this PIN when prompted:

[your meeting PIN]

2. We'll let you into the meeting.

To Join the Meeting by Computer

1. Click **[your meeting link]here[/your meeting link]** at the designated meeting time.

2. A new tab or window will open in your default web browser. From there:

- Choose the option to join on the web if you don't normally use Teams, then click "Join now."
- Join through your desktop or mobile application if you're familiar with using Teams and would prefer that to the web version.

If you have other questions about how to use Teams, please reach out!

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