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

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

July 2026

Thank you for reading the June bulletin!

Last Month's Bulletin

In the June 2026 bulletin, discussion topics included the RIM Orientation Packet, County Commission on Public Records 5-15-6-1, CCPR Member Survey, New Building Information, 7/24 Regional Training in Vanderburgh County!, and the Topic of the Month was Elected Offices, please Leave the Records out of the Rivalry.

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

RIM Orientation Packet!



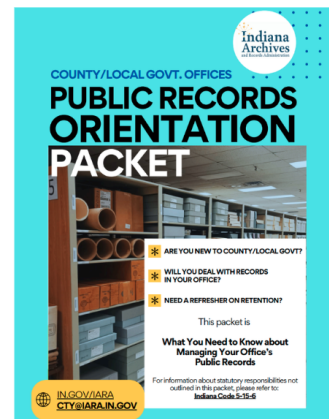
The Records & Information Management Orientation Packet is designed for

- 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.



County Commission of Public Records (CCPR) & Indiana Code 5-15-6-1

What is the CCPR? A commission with a Secretary and Chairperson that collects destruction paperwork for inclusion in meeting minutes, approves other destruction/transfer paperwork when submitted, and meets once per calendar year.

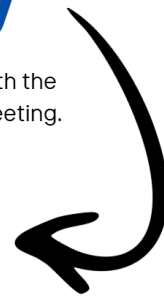
Who are the members? The Circuit Court Judge, County Clerk, County Recorder, Board of County Commissioners President, County Auditor, Superintendent of Schools for the School District of the County Seat, and either the City Controller or Clerk-Treasurer. Designees or proxies allowed.

Why is this important? To encourage, support, and remind other government offices in the county to follow retention schedules, complete the proper destruction paperwork, and abide by Indiana Code which safeguards our public records.

See the **County Commission of Public Records** webpage for more information or reach out via email to cty@iara.in.gov.

CCPR Member Survey

This survey is to help IARA better understand how to assist counties with the statutory requirement of the County Commission of Public Records meeting.

A screenshot of a web survey titled "County Commission of Public Records Survey". The survey is for the purpose of helping IARA understand how to assist counties with the statutory requirement of the County Commission of Public Records meeting. It includes a question about whether the county has a CCPR meeting in 2025, with radio button options for "Yes" and "No". A "Submit" button is at the bottom.

New Building Information

As part of IARA's upcoming move to a new building, **the Indiana State Archives will temporarily pause acceptance of physical records beginning May 1.** Offices with questions or concerns can contact the State Archives at arc@iara.in.gov. We are happy to collaborate with you to help ensure this transition works for your operations. Additional details and timelines will be shared as they become available. Thank you for your patience as we work to ensure a smooth transition to the new building.



8/6 Regional Training in Bartholomew County!

In 2026, we will be doing 7 regional visits across the State of Indiana to be more accessible for you all in the counties.

February 26: Parke County (West Central)
April 17: Henry County (East Central)
June 12: La Porte County (Northwest)
July 24: Vanderburgh County (Southwest)
August 6: Bartholomew County (Southeast)
October 30: Whitley County (Northeast)
December ?: Marion County (Central)

A flyer for "RECORDS TRAINING" on 08.06.2026. It is titled "FREE FOR ANY COUNTY/LOCAL OFFICE!". The training is on records & information management, destroying and transferring records, permanent & critical records, electronic records, digitization projects, & learning about the County Commission of Public Records. Other benefits include a Q&A session & 1:1 discussions. The date is 08.06.2026 from 10:00 a.m. - 12:00 p.m. at Columbus City Hall Meeting Room, 123 Washington St., Columbus, IN 47201. It includes an RSVP by Monday, August 31, with limited space available. A list of who should attend includes: Records Officer, Public Libraries, Local Health Depots, Cities & Towns, Planning & Zoning Depts., Township Trustees, I&L Public Officials, and Public Safety Agencies. A starburst says "LEADS & OTHER CREDITS AVAILABLE!". The footer has the IARA logo and phone number 317.532.9853.

If you'd like to register for a regional training, please email cty@iara.in.gov.

Online Recorded Training for SWCDs



I created a 30-minute training video for Soil and Water Conservation Districts. It is posted on the Indiana State Department of Agriculture's website. The training covers retention and destruction basics for all SWCDs.

Topic of the Month: Updates for Assessing Officials, Cities & Towns, & Public Libraries

On June 24, the Oversight Committee on Public Records approved revisions to the Assessing Officials (AS) and the Cities & Towns (CT) retention schedules. Please review or download the updated version

On the AS, description of AS 12-07 revised from "Records include but are limited to" to be consistent with the other records series and say, "Records may include but are not limited to." On the CT, description of CT 10-04 revised to include, "Applies ONLY to," for clarity on what's covered in that record series.

AS 12-04	DEDUCTION FORMS - GENERAL Records may include, but are not limited to, SF 12662, SF 45651, SF 52500 (Form RE-CCP), SF 53179 (Form 322/VBD), SF 53812, or their substitutes, as well as supporting documents.	DESTROY after five (5) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.
AS 12-05	DEDUCTION FORMS - EXTENDED USE Records may include, but are not limited to, SF 5473 (Form HC10), SF 18865 (Form SES/WPD), SF 43708, SF 43709, SF 43710, SF 49567 (Form 322A), SF 49568 (Form 322), SF 52501 (Form EZ-2), or their substitutes, as well as supporting documents.	DESTROY after ten (10) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.
AS 12-07	PROPERTY TAX EXEMPTION FORMS Records include but are limited to SF 9284 (Form 136), SF 49585 (Form 120), SF 54173, and their substitutes, as well as any supporting documents.	DESTROY after ten (10) years and after receipt of State Board of Accounts Audit Report and satisfaction of unsettled charges.
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ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
1	CT 10-04	LEDGERS Form 208 (Ledger of Receipts, Disbursements and Balances) and Form 209 (Ledgers of Appropriation, Encumbrances, Disbursements and Balances)	PERMANENT. See Retention Schedule Instructions for format and transfer options.

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
1	CT 10-04	LEDGERS Applies ONLY to Form 208 (Ledger of Receipts, Disbursements and Balances) and Form 209 (Ledgers of Appropriation, Encumbrances, Disbursements and Balances).	PERMANENT. See Retention Schedule Instructions for format and transfer options.

Also on June 24, the OCPR approved an autodeletion request from the Indiana State Library and the Evergreen Indiana Library Consortium. The request states that Evergreen accepts responsibility as the records custodian for the Copy of Record related to applications of resident patron library cards, reciprocal borrowing cards, public library access cards, and non-resident cards that fall under the Record Series # LIB 10-03 and LIB 10-04 on the Public Libraries retention schedule for every library in their consortium. These records will be autodeleted via daily automated script at the frequency of every three (3) years after patron account becomes inactive and after satisfaction of unsettled charges. This autodeletion will cover the applications for all libraries and future libraries in their consortium.

Those libraries who use Evergreen to create and store their applications will be exempt from managing their own Copy of Record outside of the system. If a library happens to have applications retained outside of the system (on paper), the library will be responsible for retaining that Copy of Record and destroying accordingly.

July 2026 Record Custodians Chat

Our next Records Custodians Chat will be happening on July 29th.

Meeting Information

Date: July 29th

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

AMY CHRISTIANSEN

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Indiana Archives and Records Administration**

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