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

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

November 2025

Thank you for attending October's Monthly Chat!

Last Month's Bulletin

In the October 2025 bulletin, discussion topics included the RIM Orientation Packet, Dec 10th: Combined November & December Teams Chat, Reminder for Fire Departments, Email Policy Template, October is American Archives Month, and the Topic of the Month was Revised & Approved Retention Schedules: ED, LAND, LIB, & SU!.

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

RIM Orientation Packet!

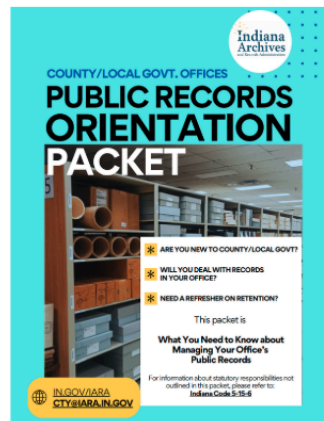
The Records & Information Management Orientation Packet is designed for

- 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 Teams Chat

Due to the holidays at the end of November & December, instead of hosting our regularly scheduled Teams chats the last Wednesday of the month at 11 a.m., IARA will host a Chat on December 10th instead. Please be mindful of this change. We will still send out 2 email bulletins for November & December, talking about both on December 10th.

LIB Retention Schedule Updates Recording

With the approval of updated to the Public Libraries (LIB) Retention Schedule, we would like to offer an updates recording for all public libraries to review.

The updated Public Libraires (LIB) Retention Schedule can be found on our website along with the updates recording.

Please pass along this recording to your public library and if anyone has questions, email cty@iara.in.gov.



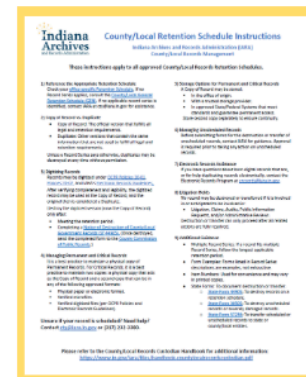
Instructions Updated!

Please find the updated County/Local Retention Schedule Instructions on all schedules now on the IARA webpage. I would highly recommend discarding any previous schedules with the outdated instructions and downloading or using the updated instructions from this link.

The major changes included:

- Reducing from 2 pages to 1 page
- Creating brief statements, refraining from lengthy explanations
- Decreasing repetitive information

Thanks to Ann Young & Madison Young for their work on these updates!



Topic of the Month: Working with Vendors on your Public Records

When you are looking for or working with a vendor to convert your records from one format to another, it is essential to keep some basic qualifications in mind not only to safeguard your records but to also understand the vendor. IARA put together the Vendor Qualifications to list those for you. If you have never embarked on a conversion project, the guide can help you plan for a successful venture with a vendor. If you have worked on a conversion project before, it can act as a handy reminder.

IARA does not recommend vendors but is happy to talk through this guide with you if you have a vendor(s) in mind. We also highly recommend that you reach out to your peers and ask if they have any recommendations.

Other IARA Publications:

Vendor Qualifications

Recommended Capabilities for Electronic Recordkeeping Systems

Electronic Records Guidelines

OCPD Policy 20-01 & 20-02

Selecting a Vendor

When selecting a vendor, **it is important to do your due diligence**. Don't be afraid to ask vendors questions or push them to answer if they are vague. You want your time and money to be well spent and to have the best possible outcome at the end.

In essence, you want a vendor that is trustworthy, can do the work, is able to meet deadlines, charges a sustainable but not exorbitant rate, and has a well-established reputation.

Questions to ask when selecting a vendor:

1. Is the vendor able to meet State of Indiana requirements?
2. How long has the vendor been in business?
3. Has the vendor done this type of conversion work before?
4. Can the vendor share reference or testimonials?
5. Is the vendor responsive?
6. Can you tour the vendor's facilities?
7. What kind of security does the vendor have in place?
8. How are documents or microfilm handled?
9. Is the vendor insured?
10. Can you access your materials while they are at the vendor?
11. Can the vendor fulfill your project plan or help you write a project plan?
12. Can the vendor meet your budget, and will they stay within that budget?
13. Does the vendor offer temporary back up services for electronic files?
14. How will materials be scanned or filmed?
15. Will the vendor provide a sample?

For more information, please review the Vendor Qualifications and reach out to cty@iara.in.gov anytime you have questions when dealing with a vendor!

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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