



# RECORDS CLEANUP CHECKLIST



Use this checklist to guide a quick and efficient cleanup of paper and electronic records.

## 1 Identify Where Your Records Live

- Shared Drives
- Email
- Local Computer (Desktop, Downloads, Documents)
- Cloud Systems or Applications
- Paper Files

Tip: Make a short list of the locations you personally use.

## 2 Locate Your Retention Schedule(s)

- [State Retention Schedules](#)
- [County/Local Retention Schedules](#)

Tip: If you do not know which retention schedule applies, reach out to IARA.

## 3 Remove Obvious Non-Records

- Duplicate Copies
- Reference Copies
- Personal Items

Tip: This first pass often removes a large volume.

## 4 Group What Remains

- Active records (currently used)
- Inactive Records (no longer used, must be retained)
- Records potentially eligible for destruction

## 5 Apply Retention

- Identify the applicable retention schedule
- Find the matching record series
- Check retention period and trigger
- Verify records have met retention before transferring or destroying

Tip: When in doubt, ask before destroying any records.

## 6 Organize and Store

- Use clear, consistent folder names
- Move inactive records out of active folders
- Store records in approved locations
- Label paper files clearly

## 7 Determine Final Disposition

- Records may be destroyed after retention is met
- Records may be transferred to the Records Center
- Records must be transferred to the State Archives
- Records are maintained permanently in the agency/office

Tip: The retention period tells you which disposition path applies.

## 8 Transfer (if applicable)

- Confirm records are eligible for transfer based on retention schedule
- Identify where records should be transferred to (Records Center or State Archives)
- Follow IARA transfer procedures and fill out [applicable forms](#)

## 9 Destroy Securely (if applicable)

- Confirm records are eligible for destruction based on applicable retention schedule
- Obtain any required approvals
- Shred paper records to protect sensitive or confidential information
- Securely delete electronic records
- Document destruction

## 10 Prevent Future Clutter

- Save records directly to shared locations
- Avoid using email as long-term storage
- Follow clear naming conventions
- Schedule regular mini-cleanups

**Need Help?** Contact the Records and Information Management Division team:

County/Local Offices: [cty@iara.in.gov](mailto:cty@iara.in.gov), Electronic Records: [erecords@iara.in.gov](mailto:erecords@iara.in.gov), State Agencies: [rmd@iara.in.gov](mailto:rmd@iara.in.gov)

**Destruction Guidance:** [Responsible Records Destruction for State Agencies and County/Local Offices](#)