COUNTY/LOCAL RECORDS MANAGEMENT

RECORDS CUSTODIAN NEWSLETTER

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

September 2025

Thank you for attending August's Monthly Chat!

Last Month's Bulletin

In the August 2025 bulletin, discussion topics included the RIM Orientation Packet, Aug 14: AS/AU/TR Taskforce Meeting, Nov 14: Cleaning & Mending Workshop, and the Topic of the Month was What is the OCPR?

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.
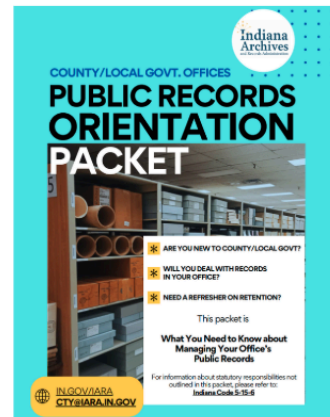
CCPR Meetings & Livestreaming

Indiana Code 5-14-1.5-2.9 went into effect on July 1, 2025. Guidance from the office of the Public Access Counselor and the Indiana Office of Technology is also available on their websites.

Any recording of a live streamed meeting along with any supporting documents such as the agenda, minutes, and memoranda, may be considered a public record. When you begin recording your meeting be aware that you may be creating a public record and ensure you understand your records retention responsibilities.

Do County Commission of Public Records (CCPR) meetings need to be livestreamed? Yes. The recordings are covered under Record Series # GEN 10-02 and the meeting minutes are GEN 10-01.

If you have more questions regarding live streaming and records management, please review the webpage.

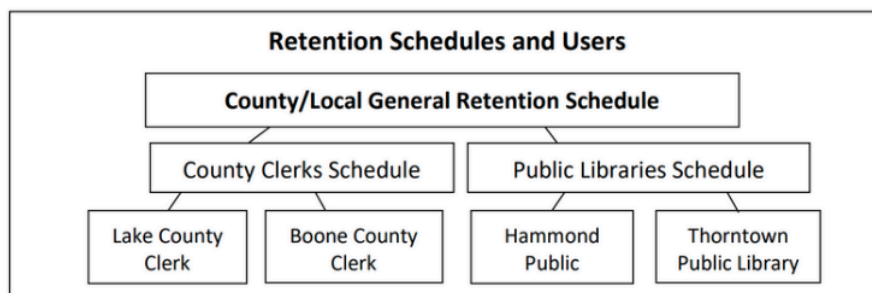## Indiana Recorders Association Newsletter – Summer 2025

Amy Christiansen from the Indiana Archives & Records Administration (IARA) spoke about records retention.

More information on schedules, forms and proper methods can be found HERE.

Email cty@iara.in.gov.

Indiana Archives and Records Administration

Topic of the Month: Retention Schedules

Office-specific retention schedules list all of the record series that belong to a general function of county or local government, rather than any specific county, city, or other political subdivision.

- So the County Clerks retention schedule applies to all County Clerks in Indiana; the Public Libraries retention schedule applies to all public libraries, and so on.

Retention Schedules and Users

County/Local General Retention Schedule

County Clerks Schedule — Public Libraries Schedule

Lake County Clerk | Boone County Clerk | Hammond Public | Thorntown Public Library

There are 15 office-specific retention schedules. See if your office is listed below:

1. Assessing Official (AS)
2. County Auditor (AU)
3. Non-Judicial County Clerk (CL)
4. County Coroner (CO)
5. County Recorder (RE)
6. County Surveyor (SU)
7. County Treasurer (TR)
8. Cities & Towns (CT)
9. Township Trustee (TT)
10. Zoning, Planning, Development, and Enforcement (LAND)
11. Educational Institutions (ED)
12. Local Health Dept. (HD)
13. Public Libraries (LIB)
14. Public-Private Agreement Operators (PPA)
15. Public Safety Agencies (PSA)

The County/Local General (GEN) retention schedule contains broad and common record series that can apply to all units of county or local government.

The GEN record series should only be used, however, if there isn't an applicable record series on the office-specific retention schedule for your type of government office.

Check your own office-specific retention schedule first, then the GEN schedule.
If you can't find your records on either, reach out to IARA for help! Email cty@iara.in.gov.

September Record Custodians Chat

Our next Records Custodians Chat will be happening on the 24th.

Meeting Information
Date: September 24th
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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