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[IARA - County/Local Records Custodians] Monthly Bulletin and Chat Invitation April 24, 2024

Indiana Archives and Records Administration sent this bulletin at 04/12/2024 10:00 AM EDT

	<p>County/Local Records Management 402 W. Washington St. Rm W472 Indianapolis, IN 46204 e: cty@iara.in.gov ph: 317-232-3380</p>
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 **Abundant April to You, Records Custodians!** 

I should have put a rain emoji 🌧️ in the subtitle because April started off with some great rain showers! I'm glad to be in the month of April now; March was quite hectic and I want to apologize to anyone who received a delayed response to questions. I am working through the backlog and catching up quickly. I hope your April brings beautiful tulips, walks in your local park, and many other spring adventures!

Last Month's Bulletin

In the March 2024 bulletin, discussion topics included April being Records & Information Management Month, my Birthday/Baby Moon, the [PSA Retention Schedule Updates and Online Training](#), and the Topic of the Month was AI Technology.

To view past bulletins and chats, go to our [RM Bulletins and Chat Archive](#) webpage.

News You Can Use: No Travel, No May 29th Chat, & My Soon to be Leave

Reminder! I am no longer traveling as I'm in my last weeks of pregnancy and need to stick close by Indianapolis and the hospital just in case. 🤰 Although, I am still available to do presentations or discussions via Microsoft Teams, Zoom, or the telephone. Also, there will be no Teams Chat held on May 29th. Both myself and Madison will be out of office that day. We will still send a May monthly email bulletin but we have cancelled the Chat. **And please be prepared for my leave this summer by directing all records & information management questions to cty@iara.in.gov.** Madison

Young and the rest of the RIM division will do an excellent job taking care of your concerns in my stead! **Again, do not email achristiansen@iara.in.gov or call (812) 929-3882 because neither will be monitored for about 3 months, from mid-May to August.** Reach out to cty@iara.in.gov!

News You Can Use Again: April is Records & Information Management Month!

RECORDS & INFORMATION MANAGEMENT MONTH
APRIL x 2024

April is Records and Information Management Month and the Indiana Archives and Records Administration invites you to celebrate good recordkeeping! Do you want to learn more about how to manage your records? Want to learn more about best practices and how to be a good records steward? Join the IARA Records and Information Management Team for two webinars during April!

- [Electronic Records & County/Local Government Offices: What You Need to Know!](#)
- April 23, 10:00-11:30 a.m.: Responsible Records Destruction for State of Indiana Agencies. (This webinar is geared towards state agencies, but all are welcome!) [Learn more and register.](#)



INDIANA ARCHIVES AND RECORDS ADMINISTRATION
RECORDS AND INFORMATION MANAGEMENT

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

News We Can Celebrate: Congrats St. Joseph County/South Bend on Award!

Check out our colleague Katerina Carter and associates who won the 2023 Local Cooperation Award from the Association of Indiana Counties. See the award information and story published in the Society of Indiana Archivists [Spring/Summer 2024 newsletter](#) on page 11! Again, congratulations and if your county is celebrating an accomplishment in archives and records management, please let us know! We would love to highlight you in an email bulletin for all counties to see!

RM Topic of the Month: Departed Staff Members' E-mailbox

Email can be one of the most complex records to manage, particularly when it comes to managing mailboxes after a staff member has left an office. This is one of the most common requests for help that IARA receives, so this month we'd like to share some tips. If you have a question that is not addressed below, please reach out to erecords@iara.in.gov.

Determining what to do with a departed staff member's mailbox is a three-step process.

Step 1: What role did the staff person play?

When a staff member leaves, the first thing to determine is whether or not they were a policy or

decision maker. Some examples of titles that would be considered a policy or decision maker are executive director, chief of staff, and director.

Step 2: What record series does the mailbox fall under?

If you determine that the staff member was indeed a policy or decision maker, their mailbox will need to be retained under record series [GEN 10-03](#) on the [County/Local General Retention Schedule](#). GEN 10-03 records are designated as permanent and can be maintained electronically.

If you determine that the staff member was not a policy or decision maker, their mailbox will need to be retained under record series [GEN 10-04](#) on the County/Local General Retention Schedule. The retention for GEN 10-04 says to destroy after 3 years. Use the [SF 44905 form](#) to destroy these records.

See [Quick Reference -Retaining Email Records](#) for more information.

Step 3: How should the records be managed?

GEN 10-03 records need to be maintained permanently. If you are not sure how to maintain a mailbox permanently and would like advice, please reach out to erecords@iara.in.gov. Please note that due to space constraints, the Indiana Archives does not accept county/local mailboxes.

GEN 10-04 records can be destroyed after three years using the [SF 44905 form](#). For both record series GEN 10-03 and GEN 10-04, IARA strongly recommends you speak with your IT department or the vendor that is hosting your email client to determine how long they retain mailboxes to ensure you are able to follow the retention for these series.

Other information to keep in mind:

Not all emails in a mailbox may fall under a record series. Some emails may be non-scheduled records or considered non-records such as spam and newsletters that originate from another office. Non-records can be deleted immediately or whenever, no form needed. To determine what to do with non-scheduled records, reach out to cty@iara.in.gov. Removing non-records can help cut down on storage costs and is well worth the effort. See the [County/Local Records Custodian Handbook](#) for more information on non-scheduled records and non-records.

It is crucial that you speak with your IT department or email vendor in order to understand the deletion cycle and capabilities of your office's email client. Some email clients are set up to automatically delete emails, others keep them in an immutable location for a pre-determined period of time.

It is important to ensure that any roles whose records may fall under GEN 10-03 understand that emails they send and receive may be permanent records and to educate them on taking care when deleting emails from their mailbox.

April Records Custodians Chat

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

Meeting Information

Date: April 24, 2024

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.

I've included an agenda to help keep me us all on topic, so there'll be plenty of time for your questions and records management discussion once Amy remembers to click Mute!

Adding Yourself to the Meeting Invite List

✉ Desktop Outlook

- Save the [attached 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 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** 317-552-1674 at the designated meeting time, then enter this PIN when prompted:
614 865 189#
2. We'll let you into the meeting.

To Join the Meeting by Computer

1. Click meeting link [here](#) 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, or about the meetup, just contact me and we'll figure things out together!

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AMY CHRISTIANSEN

Records Management Liaison

Indiana Archives and Records Administration

o: 812-929-3882

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