[IARA - County/Local Records Custodians] Monthly Bulletin and Chat Invitation August 28, 2024

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⚔️ 👝 🎪 Awesome August, Records Custodians! 🎪 👝 ⚔️

August is Indiana State Fair time here in Indianapolis, I think I'll brave the sweltering heat to go try the fair food such as the Godfather Egg Roll, Hoosier Cowboy Sandwich, and the Dill Pickle Lemon Shake-Up. It also means the kiddos are back in school. For me, August is the gateway to Fall, the transition to somewhat cooler weather and hopefully my AC getting a break from constant running.

Last Month's Bulletin

In the July 2024 bulletin, discussion topics included Amy C is IN (sort of), Approved and Updated Retention Schedules!, and the Topic of the Month was Copy of Record & Duplicates.

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

News You Can Use: IARA Staff Update

I am sad to announce that Amy Robinson moved on from her position as State Records Analyst last week. We wish her the best and thank her for her long service to the State of Indiana. She will be missed.

Our director, Meaghan Fukunaga will be temporarily taking over the duties of the State Records Analyst until the role is filled. If you have questions about retention schedules, managing records, or RIM processes please email rmd@iara.in.gov and she will be in touch!

Tips You Can Use: Proper Storage Environments/Handling Moldy Records

IARA is hearing about a lot of county records being stored in unstable environments that have unfortunately bred mold and/or insect infestations which damage public records. We would like to encourage you to store records in proper environments where damage will be at a minimum or even non-existent and we would like to give you some advice on how to handle moldy records if you find yourself in that situation. If you do come across severely damaged records with mold or insect infestations, please contact cty@iara.in.gov for the procedures for destruction.

If you know your records are being stored in an unstable environment and could cause damage, don't wait, go ahead and move them! Storage environments with stable temperature and humidity are best, dry with no water pipes preferable. Other tips when dealing with severely damaged records:

1. Protect yourself first. (disposable protective gloves and N95 respirator/mask, toss after use. Even a plastic suit or shoe covers.)

2. Clean or have the collections and the area cleaned as quickly as possible. (Isolate the materials, dry the wet records to mitigate new mold growth, clean the space, etc.)

3. The safest solution to the problem is to destroy the moldy records WITH permission from IARA. (incineration)

- Toss used disposable protective gear in a dumpster after bagging it in plastic. Don't throw it in an office trash can or somewhere else where it can contaminate other papers.
- Use a dehumidifier and/or charcoal bags to absorb moisture and the smell of mold or mildew.
- Go through records outside if possible, or in a ventilated space. Often times moldy records are in dark, damp, poorly ventilated spaces or in a room with an active moisture problem like a water leak (which is why they are moldy to begin with) and these conditions can make working with them harder.
- Wash your hands and face after handling moldy records.
- If you think you have black mold stop and consult a mold specialist.
- *Just because a box or external container is moldy, does not mean the files and items inside are moldy.* Boxes do a lot to protect records so always look inside before deciding records are a total loss based on the condition of the box.
- If you experience any adverse health symptoms stop, and find someone else who can continue going through the records.

RM Topic of the Month: Records & Administration Changes

This month's topic is one that is probably on many of our minds - the upcoming administration change. You may be seeing co-workers leave or make plans to change positions. Maybe your office head announced plans to find something new in 2025. Perhaps some of your office's leadership are looking to make a role change.

Administration changes are just that - a time of change. To help keep operations running and onboard new staff, a robust records management plan is essential! **There are two objectives to keep in mind during a time of transition - managing records for continuity/business use and ensuring the records of your current leadership team are preserved.** These two objectives go hand-in-hand, and you will be most successful if you keep both of them in mind.

Continuity/business use records are those records that an incoming staff and administration will use to inform them of the day-to-day operations, institutional history, and how the statutory responsibilities of your office are performed. Keep in mind, that in some cases continuity/business use records and

permanent records may be one and the same and particularly for electronic records you always keep a Copy of Record for the incoming administration.

Begin by determining whose records you need to gather. Common roles whose records have high continuity/business use value include office head, leadership team, division directors, chiefs of staff, and policy staff. Look for roles whose records an incoming administration may find useful and roles whose records are scheduled as permanent. Check the County/Local General Retention Schedule and the schedule specific to your office to get started. If you have questions about retention schedules, please reach out to cty@iara.in.gov.

The next step is locating your records - these can be electronic and/or physical locations. Some common digital locations are email, Outlook calendars, OneDrive, SharePoint folders, and server folders. Physical records may be stored in desk drawers, filing cabinets, or entire closets/rooms. Physical records and electronic records may be organized or organized chaos or just chaos - all are normal, and all are workable.

If you find yourself faced with a daunting task and are unsure how to proceed, you can use what are referred to as "buckets": Keep and Destroy. Determine what you do need to keep - don't worry at first about how long you need to keep a record, what format it is in, or what its final disposition is. Just determine what needs to be saved. Also determine what you can safely destroy - again check the County/Local General Retention Schedule and the schedule specific to your office to get started. Your "Keep Bucket" in SharePoint or on the server might simply be a folder called "Keep," or you might instead choose to add the word "KEEP" to the end of files and folders. Your "Keep Bucket" in a filing cabinet might be a drawer labeled "KEEP," while in a storage closet or room it might be one side of the room with boxes labeled "KEEP" on them. Likewise, your "Destroy Buckets" might take similar form. It's mostly about making some sense of chaos and finding a way to easily cut down on your work.

Once you have your buckets, you can begin to fine tune things. In your "Keep Bucket" you will start to figure out how long you need to keep records and what their final disposition is according to a retention schedule - is it destruction X years from now? Is it a permanent record you need to keep? In your "Destroy Bucket" you will do a final pass and make sure that everything is actually eligible for destruction. You will also make sure you know how to correctly destroy confidential records, and that electronic records are really deleted and not just in an electronic recycling bin.

If at any time you have questions, just reach out to cty@iara.in.gov. We are happy to meet with you, talk through questions and issues, and offer advice. We know that change can be daunting, but when it comes to the records component of an administration change we are here to help!

August Records Custodians Chat

Our next Records Custodians Chat will be happening on August 28th.

Meeting Information

Date: August 28, 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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