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[IARA - County/Local Records Custodians] Monthly Bulletin and Chat Invitation January 31, 2024

Indiana Archives and Records Administration sent this bulletin at 01/12/2024 10:01 AM EST



County/Local Records Management
 402 W. Washington St. Rm W472
 Indianapolis, IN 46204
 e: cty@iara.in.gov | ph: 317-232-3380

   **Jolly January, Records Custodians!**   

Welcome to 2024! I'm excited for this first month of January and all the newness it brings, a new year and new opportunities abound. I hope you all had a fresh start to the year and are looking forward to many blessings and life affirming transformations. I'm honestly looking to settle down from the holidays, focus on some house projects, and stay warm. Like I said last month, my co-worker Madison Young will be leading the January monthly chat on the 31st, so please be kind to her!

Last Month's Bulletin

In the December 2023 bulletin, discussion topics included the 2024 Monthly Chat Schedule, the Critical Records Program [Survey](#), Amy's personal news which included her wedding and honeymoon, and the topic of the month was about help needed as taskforce members.

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

News You Can Still Use: Looking for Taskforce Members!

As 2024 begins, we are continuing a goal to update and improve county/local office-specific retention schedules. RIM would like to update in 2024 the Township Trustee (TT), the Cities & Towns (CT), and Zoning, Planning, Development, and Enforcement (LAND) retention schedules.

IARA begins the process of updating retention schedules by creating taskforces of IARA staff along with individuals associated with the records in those schedules. So, we are hoping to recruit township trustees, employees of cities and towns who deal with records management frequently, and members of zoning or development boards.

If you know anyone or you yourself would like to help on a taskforce, please let Amy know by emailing achristiansen@iara.in.gov

What is required of me to help on a taskforce? Not much! Taskforces will meet once a month on Microsoft Teams (usually lasting an hour) until the taskforce feels the new draft of the retention schedule is ready for approval by IARA and the OCPR. At the meetings, we usually go over the retention schedule and look for any changes, any records missing, etc. to add/revise the draft. You can participate as much or as little as you like.

CCPR secretaries, please forward this email bulletin to your township trustees, cities and towns, and any zoning, planning, development, and enforcement boards in your county accordingly.

News You Can Also Use: RE Retention Schedule Updates and Online Training

In October 2023, the OCPR approved updates to the [County Recorder \(RE\) retention schedule](#).

Some of the updates include 1 brand new record series, descriptions on most CRITICAL records, and amendments to the language on multiple record series. (See Record Series Update Overview at the end of the schedule packet for more details or attend the online training.)

Also, on Friday, January 26th, 2024, IARA will be giving a training on those updates at 10 a.m. eastern virtually on Microsoft Teams for anyone interested although we would encourage county recorders and their deputies to attend.

What: Online Training for the Updates to the RE Schedule

When: Friday, January 26th at 10 a.m. EST

Where: Microsoft Teams (virtual, will be recorded)

Who: IARA's Records & Information management staff

How to Register: Click this [link](#). If you have any trouble registering, please reach out to cty@iara.in.gov.

RM Topic of the Month: 2024 CCPR Secretary/Chairpersons

It's that time of year again! Where IARA checks in with each of Indiana's 92 counties to verify the name/contact information of the secretary and chairperson for the County Commission of Public Records. In late January/early February, Amy will start calling around to the Clerk's and Recorder's offices for the information.

County Records Retention Schedule (RE)
INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) - County/Local Records Management

Approved by Oversight Committee on Public Records on 10/25/2023

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
ENTRY OF INSTRUMENTS FOR RECORDING		
1	DEED BOOK A book or electronic index of instruments recorded that includes but is not limited to: grantor and grantee names, date, time, and location of recording. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.
2	ORIGINAL INSTRUMENTS NOT RETURNED TO THE PUBLIC These may include leases, wills and testaments, bills of sale, powers of attorney, articles of incorporation, deeds, mortgages, chattel mortgages, and other documents relating to real or personal property. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.
LAND TRANSACTIONS		
3	DEED RECORDS AND INDEXES Includes original deeds, official copies, and their indexes. Deed types may include but are not limited to General Warranty, Sheriff's, Tax Sale, and Cemetery. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.
4	QUEST TITLE RECORD AND INDEX A book or electronic index of the proceedings in a lawsuit to confirm ownership of a piece of property. Records may include, but are not limited to, a brief description of the real estate that was the subject of the proceeding, an alphabetical list of plaintiffs, date of transcript filing, date of final judgment and date judgment was recorded. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.
5	TRACT BOOK This is an abstract to land grants made by the federal government, showing dates of grant and filings, location and description of tract, and name, age, and nationality of patentee. Also known as "Cattle Patent Land" and "List of Land Entries." THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.
6	PLAT BOOK/PAT BOOK GENERAL INDEX/PLATS This shows public grounds, public ways, and the length, width, and size of each lot. Includes a certificate showing the approval of the plan commission or works board. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.
7	INDEX OF NOTICES OF LIENS ON REAL PROPERTY A statement of claim filed under IC 23-23-10 to retain mineral rights on a property not owned by the claimant. THIS IS A CRITICAL RECORD.	DESTROY fifty five (55) years after satisfaction of lien.
MORTGAGE TRANSACTIONS		
8	MORTGAGE RECORDS AND INDEXES Includes original mortgages, official copies, and their indexes. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule instructions for format and transfer options.

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*****Please submit the name/contact info of your county commission of public record's secretary and chairperson for 2024 to IARA via email, cty@iara.in.gov.*****

At least once a year, your county should be hosting a County Commission of Public Records meeting. There are two positions, *chairperson* (*chairman*) and *secretary*, that should be designated according to the Indiana Administrative Code:

IC 5-15-6-1 (c) The commission shall elect one (1) of its members to be *chairman*. The clerk of the circuit court or the county recorder must be *secretary* of the commission. The person who serves as *secretary* shall be determined as follows:

- (1) By mutual agreement of the clerk of the circuit court and the county recorder.
- (2) If a mutual agreement cannot be reached under subdivision (1), by an affirmative vote of a majority of members of the county commission.

The commission shall provide to the administration (IARA) the names and contact information for the *chairman* and *secretary* not later than thirty (30) days after the date of the determination. The members of the county commission shall serve without compensation and shall receive no disbursement for any expense.

Where can I find more information about the CCPR and secretary duties? In the County/Local Records Custodian [Handbook](#) attached, pages 28-31.

Looking to encourage CCPR members to attend the meetings? Please see this [IARA letter](#).

January Records Custodians Chat

Our next Records Custodians Chat will be happening on January 31st.

Meeting Information

Date: January 31, 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!

...

AMY CHRISTIANSEN

Records Management Liaison

Indiana Archives and Records Administration

o: 812-929-3882

e: achristiansen@iara.in.gov

w: www.in.gov/iara

a: 402 W Washington St, Room W472, Indianapolis, IN 46204

- [county_recorder_new.pdf](#)
- [IARA letter to county commission members 2023.pdf](#)
- [handbook-countylocalrecordscustodian_new.pdf](#)

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