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

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   **Festive July, Records Custodians!**   

July is an exciting month for IARA! Most of the RIM division is heading off to NAGARA's annual conference in mid-July; this year it is in Atlanta. And Amy is returning from parental leave, starting back part-time and then she will be back full-time by August. We hope you all had a fun Fourth of July and continue to enjoy the summer festivities and weather.

Last Month's Bulletin

In the June 2024 bulletin, discussion topics included Amy C is out on leave, Madison is filling in, Introducing Madison, and Shredding Services and Q&A with Grant Durnill.

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

News You Can Use: Amy is IN (sort of)

Amy Christiansen is back part-time, transitioning from new parent leave to full-time work. She will be working a couple of days a week. So please bear with her over the next weeks if there is a delay in response. She will be back full time by August. If you need immediate assistance, please email cty@iara.in.gov.

More News You Can Use: Approved & Updated Retention Schedules!

In June, the Oversight Committee on Public Records (OCPR) approved updates to 3 county/local retention schedules, the [Township Trustees \(TT\)](#), the [Zoning, Planning, Development, and Enforcement \(LAND\)](#), and the [County/Local General \(GEN\)](#). *Please disregard outdated retention schedules.* Many thanks to those who helped on the taskforces to update these schedules and keep a lookout for online trainings about the changes in the Fall.

RM Topic of the Month: Copy of Record & Duplicates

When you're dealing with duplicates, whether they're in the same format as the original, or a different format, you'll need to determine which version is the Copy of Record, with all other versions being a duplicate. As long as the information is the same, you get to decide which version that is. The Copy of Record does not need to be the original. It doesn't even need to remain the same copy over the lifetime of the record: if you duplicate a paper record in microfilm format, you might decide that the microfilm is now the Copy of Record and destroy the paper originals.

The Copy of Record is whichever version of the information your office currently uses to fulfill the legal retention requirements for that type of information. As long as

- the information is an authentic duplicate
- the format and medium meet IARA standards (60 IAC 2 for microfilm, and OCPR [Policy 20-02](#) for electronic records) then any version of the information can be the Copy of Record.

Destroying Duplicates and Other Non-Records

The following items may be destroyed at any time, once they are no longer needed/useful for your office:

- Copies of a public record that are NOT the Copy of Record
- Non-record materials

You do not need prior permission from IARA or your County Commission of Public Records, nor do you need to notify anyone afterward. You don't need to need to fill out any forms because these items are not considered records.

Duplicates of confidential materials are still confidential, though, and must be destroyed in a confidential manner.

The BIG Question:

Is this our record? If we send the record to another office like the payroll dept. or county auditor and they keep that record, do we also have to keep that record?

The BIG Answer:

YES!

Any record your office creates is considered a public record and you will need to keep a Copy of Record. It will also now be considered a public record in the other office such as the payroll dept. or county auditor and they will keep it according to the retention schedules too. It becomes a record in both offices. **If the payroll dept. is in the same office as you, only 1 Copy of Record is required to exist.**

July Records Custodians Chat

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

Meeting Information

Date: July 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

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