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[IARA - County/Local Records Custodians] Monthly Bulletin and Chat Invitation March 27, 2024

Indiana Archives and Records Administration sent this bulletin at 03/19/2024 11:00 AM EDT



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   **Marvelous March, Records Custodians!**   

It's my birthday month AND I'm 7 months pregnant so we are celebrating both by going on a "baby/b-day moon" to Key West, Florida. We have tickets to the Dry Tortugas National Park and I'm really excited to do some snorkeling and relaxing on the beach in the sunshine! I hope you all enjoy your March as spring starts sprouting in the Hoosier state. Don't forget to wear green on St. Patrick's Day! I hate getting pinched.

Last Month's Bulletin

In the February 2024 bulletin, discussion topics included that IARA is still looking for taskforce members to help with the CT schedule revision, travel requests, and the topic of the month was the CL Retention Schedule Updates and Online Training.

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

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

April is Records & Information Management Month (RIMM) and the Indiana Archives & Records Administration's RIM division will be hosting a webinar about electronic records for county/local government offices across the state of Indiana. Topics will include understanding retention schedules, the difference between Copy of Record, duplicates, and original record, what format agnostic means,

converting records from paper to electronic, dealing with born digital records, and electronic recordkeeping systems as well as IARA publications, policies, and procedures for electronic records.

When: Friday, April 5th, 10:00-11:30 a.m. eastern on Microsoft Teams

Click this [link](#) to register.

News You Can Also Use: Baby/Birthday Moon

I'll be gone on a quick vacation roughly March 15-18. If you have any immediate questions, contact cty@iara.in.gov and one of the other RIM staff, most likely Madison Young, will respond to you!



News You May Be Able to Use: PSA Retention Schedule Updates and Online Training

In October 2023, the OCPD approved updates to the [Public Safety Agencies \(PSA\) retention schedule](#).

Some of the updates include 5 brand new record series, 4 deactivated record series, and 35 amended record series. (See Record Series Update Overview at the end of the schedule packet for more details or attend the online training.)

On Friday, March 22nd, 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 public safety agencies such as police, fire, EMT, dispatch, corrections and jails, etc. to attend.

What: Online Training for the Updates to the PSA Schedule

When: Friday, March 22nd 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: AI Technology

Have you heard of a Teams add on called Read.ai? We hadn't, until we noticed it joined one of our recent meetings! Read.ai is an Artificial Intelligence tool that takes notes in virtual meetings, creates a "report" after the meeting, and emails that "report" to a selection of attendees. "Report" is in quotes, because Read.ai is not a skilled minute taker that can create notes that would ever be considered a trustworthy public record.

Please note that Read.ai is not a sanctioned State of Indiana add on for Teams and may pose a security risk so please do not use it during IARA meetings. Please know that if you do use Read.ai during a Teams meeting, you may be asked to identify yourself to the moderator and may be asked to leave the meeting (in order to remove the bot). If you would like a recording of the meeting, please just let us know!

For additional context, here is a list of records and information management concerns when it comes to AI systems creating meeting minutes, official notes, or any public records without oversight. The *without oversight* part of that is crucial - AI can be a wonderful tool, when used with transparency and guardrails in mind. Unimpeded though, it may lead to unintended consequences. This list may change over time, but for now, IARA hopes this helps if you are thinking through your own potential uses of AI with records and information management.

- **Storage:** Where are the "reports" being stored and what security controls are in place on this storage?
- **Access:** Who receives a link to the "report" via email? Who has access to them and what happens with the data that the company is collecting?
- **Privacy:** Read.ai joining a meeting could violate attorney client privilege. It could also violate other types of confidentiality, as could the act of it creating a "report."
- **Privacy:** How is Read.ai protecting confidential information?
- **Opting Out:** Does opting out just opt that one user out, or does it opt out everyone on the meeting? If you opt out 10 minutes after the meeting has started, does the tool keep any data it has collected about you?
- **Veracity:** Meeting minute and note taking skills can take years to hone, and there is a reason committees and boards assign a secretary role for this purpose. Tools like Read.ai are not qualified to take official notes for the public record.
- **Veracity:** The "report" differs from a video or audio recording and a transcript due to the interpretation Read.ai adds to it. Read.ai takes information, interprets it, and generates new information in the form of notes and action items.
- **Veracity:** To rely on the "report" as a record, someone would need to vet it. This is possible, but not until people better understand how these tools work, what companies are doing with them, and improve transparency as to how it is generating "reports", particularly portions like the action items.
- **Veracity:** Is the company using audio and visual data for something else? For example, there are systems that can be used to voice over videos. Could the company be using the audio information it obtains to "teach" other AI systems how to sound more human, or something similar?
- **Disposition:** Can we be 100% confident that Read.ai, or any other similar tool, actually destroys "reports" when a user requests destruction? Can "reports" be reconstituted from whatever data Read.ai is saving? How long does Read.ai save that data? If ordered by a court, would Read.ai 1) be able to reconstitute it and 2) do they have any policies regarding this?

At this point with AI exploding onto the scene, IARA has more questions than answers. But we will continue to watch and learn and share with all of you! Is your office using AI to create records? Would you like to talk about it at a future meeting? We'd love to hear from you! Just let cty@iara.in.gov know.

March Records Custodians Chat

Our next Records Custodians Chat will be happening on March 27th.

Meeting Information

Date: March 27, 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

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- [county_publicsafety.pdf](#)

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