


Preparing to Leave Office

2024 Recorders Annual Conference

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Transition

- Remember back when you first took office and think about the information that would have made your first few months easier.
- If possible, work with your successor during your last few months to ease the transition. Encourage them to attend the Newly Elected Training
- Leave the office, as you have served, providing the best service you can to the citizens of your county.



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Records and Office

- You will be turning over the Recorder's office and records to your successor.
- As part of the transition, you will need to coordinate that transfer:
 - Keys to the office
 - Keys to any secured storage such as a safe or locked cabinet.



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Cash Funds

- IC 36-1-8-2(c) Cash Change Fund reimbursement
 - “The fiscal body shall require the entire cash change fund to be returned to the appropriate fund whenever there is a change in the custodian of the fund or if the fund is no longer required.”
- If you choose to transfer custody of the cash change fund to the new Recorder, get an acknowledgement of the amount of the cash fund and keep a copy.



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Capital Assets and Equipment

- Make sure you have an updated inventory of any equipment or assets in your office.
 - Servers
 - Desktops or laptops
 - Scanners
- Get an acknowledgement of the transfer of the assets to the new Recorder.



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Bank Accounts

- Transition from your signature to the new Recorder's signature
- Provide information on all bank accounts
- Make sure the bank are reconciled through December if possible, but at least through November.
- Provide location of all bank reconcilements and supporting documents.
- Contract information for credit card payments
- Location of checks



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User ID's and Passwords

- Contact information for IT Department
- County Website access and information
- Provide a list of contacts for getting user id's and passwords established for:
 - Emails
 - Financial software
 - Records software/Enhanced access
 - Gateway for Uploads



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Internal Controls

- If you have written internal controls, and we hope you do, provide those to your successor
- If you are working on a Corrective Action Plan, provide that information and the status on that plan.
- Job descriptions for employees in the office
- Your successor may make changes, but this is a starting point.



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Recorder Record Perpetuation

- Leave copy of your plan for the Perpetuation fund
- Include list of costs that are to be paid such as license fees or software maintenance
 - Include the statute of any projects in progress
- Copy of sworn statement for the next year's budget, if applicable



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Resources – Indiana Recorders Association



- Directory
- Website
<https://indianarecorders.org/>
- Recording Manual and Desktop Reference
- Getting Started Guide



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Resources – Association of Indiana Counties (AIC)



- Website
<https://www.indianacounties.org/>
- Contact information
Jacque Clements
jclements@indianacounties.org



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Resources – State Board of Accounts (SBOA)

- Website
<https://www.in.gov/sboa/political-subdivisions/counties/recorder/>
- Accounting and Uniform Compliance Manual and Bulletins
- Contact information
counties@sboa.in.gov



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Resources – Indiana Gateway for Government Units



- Website

<https://gateway.ifionline.org/default.aspx>

- Help Desk Email :

gateway@sboa.in.gov



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Contact Us

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