



Checklist for Local Rule Review and Proposing Amendments

Review of local rules.....1
 Proposing local rule amendments.....3
 Guidance on making files accessible4

Review of local rules

Please be sure Local Rules do not duplicate or conflict with current statutes and [state-level Rules of Court](#). [Trial Rule 81\(A\)](#) only permits local rules that are not inconsistent with or duplicative of state level rules and statutes.

If something is covered by statute or state-level rules, please remove those topics from the Local Rules since parties must already follow those provisions.

Courts are required to have the following Local Rules

Rules that require Supreme Court approval

1. Special judge selection rule pursuant to Trial Rule 79(H)
Note: see [Notes on Special judge assignment rules](#).
2. Reassignment of criminal cases pursuant to Criminal Rule 2.2 and special judge selection pursuant to Crim. Rule 13
3. Court reporters rule pursuant to Administrative Rule 15
Note: any proposed increases in the per page amount cannot exceed \$0.50/page, and the minimum transcript fees cannot exceed \$35/transcript.
4. Caseload allocation rule pursuant to Administrative Rule 1
Note: please check for any new case types (listed in Admin. R. 8) not previously listed in your local rule

Rules that do not require Supreme Court approval

1. Jury selection and summons pursuant to Jury Rule 4
2. Problem Solving Court and Court Alcohol and Drug Court Program fees, if operating programs certified by Indiana Office of Court Services

Notes on special judge assignment rules

Civil cases (TR 79(H))

Include **ALL** full-time judicial officers in a court of record within your administrative district; courts **MAY** also include full-time judicial officers in a court of record from contiguous counties considering effective use of judicial resources within the administrative district.

Criminal cases (CR 2.2/CR 13)

Include **ALL** full-time judicial officers in a court of record within your administrative district **AND** include full-time judicial officers in a court of record from contiguous counties considering effective use of judicial resources within the administrative district.

*Note: These rules provide that a judicial officer appointed as special judge in either a civil or criminal case **must** accept jurisdiction unless the judicial officer is disqualified pursuant to the Code of Judicial Conduct.*

Other considerations

1. To charge late fees, courts must have a local rule in effect per IC 33-37-5-22.
2. Ensure references to individual agencies or judicial officers are accurate. For example:
 - a. Division of State Court Administration is an old reference and should now be Indiana Office of Judicial Administration (OJA).
 - b. Listing judges by name for special judge selection (i.e., Judge John Doe, Some County Circuit Court) requires frequent updating and should be avoided. It is preferable to list the courts and positions to decrease or avoid outdated references (i.e., Judge of the Some County Circuit Court; Magistrate of the Some County Circuit Court; Senior Judges available to serve Some County Circuit Court).

Format the document

Use the format for Local Rule numbering set out in [Trial Rule 81](#).

The documents you submit **must pass an accessibility check** in Microsoft Word and Adobe Acrobat. See [Guidance on making files accessible](#).

Proposing local rule amendments

Prepare the amended local rule proposal using the Track Changes feature in a Word document.

Notice content

1. [Sample notices are available online](#). One notice is for proposals submitted per Trial Rule 81 schedule and the other is for deviation from the schedule based on good cause.
2. List the rules being amended.
3. Comment period is required to be 30 days.
4. The notice can be signed electronically in PDF or using /s/ with a typed name.
OJA will no longer accept manual signatures or scanned documents since scanned documents are not accessible. See [Guidance on making files accessible](#).

Notice and proposal must be

1. [posted by OJA](#)
2. provided to local bar association officers
3. posted at clerk's office
4. posted on the clerk's web page

*Notes: OJA must receive proposed material submissions **fourteen business days prior to the beginning of the comment period for review to ensure the materials are ready for posting, address any concerns or accessibility issues, and allow the material to be posted timely for comment online.***

Format the document

After the 30-day comment period closes and comments have been considered by the judges, finalize the text for the amended local rules.

1. Submit the final text for any rule requiring Supreme Court approval in Word format so OJA staff can prepare the order for the court.
2. Submit the complete set of updated local rules in both Word and Adobe PDF accessible formats before the effective date of the amendments so OJA staff can update the local rules online on the effective date.

The documents you submit **must pass an accessibility check** in Microsoft Word and Adobe Acrobat. See [Guidance on making files accessible](#).

Guidance on making files accessible

Why document accessibility matters

The way that documents are set up can create unnecessary barriers that make it difficult or impossible for people with disabilities to access the information contained in those documents. When documents are being produced to share important court information and data with the public, it is essential that these documents meet ADA accessibility standards to allow everyone equal access to the information.

Accessibility standards help create a better product but most importantly accessibility standards ensure that those with disabilities have equal access to the same information. Court documents and public resources have moved into an online digital presence, therefore, there must be a greater focus on making these public documents ADA compliant. The Indiana Supreme Court is working to make the documents across our courts.in.gov website accessible, and the guidance below will help you produce ADA accessible documents for publication online.

All rule documents must be submitted in both Word and Adobe PDF to OJA. OJA will **no longer accept any scanned materials** since they are not able to be published in an accessible format.

Formatting in Word

Using styles to format headings, other text, and tables is the most important step you can take to create accessible documents. Start learning about styles and accessibility with these key tutorials:

- ★ 10-minute playlist with [4 videos that cover the basics of using styles](#).
- ★ 9-minute playlist with [5 videos on the basics of accessibility](#), including creating accessible tables.
- ★ Quick guide for [making accessible Word documents](#).

Heading and text styles

Use paragraph and character styles to improve document accessibility and maintenance. This allows for the proper building of the table of contents and document bookmarks.

Use one of the following fonts to ensure readability:

- Arial or Arial Nova
- Calisto MT
- Georgia or Georgia Pro
- Segoe UI
- Sitka Text
- Times New Roman
- Verdana or Verdana Pro

The paragraph numbering, spacing, font, and internal cross references should be checked for consistency and accuracy throughout the document.

Tables and images

Avoid including tables, images, graphs, and charts in your local rule document to the greatest extent possible. If tables, charts, or graphs are necessary in your local rule document, extra steps are required for producing an accessible format and inserting "alternative text" (usually referred to as "alt text") to identify these items.

- If you do include a table, you must style it correctly and add alt text.
- If you include any complex graphics or charts, you must add alt text and explain them in the text of your document or in a caption.
- If you include any images, you must add alt text or mark them as decorative. If removing the image entirely from the document does not alter the document's meaning, then it is decorative. Otherwise, it should have alt text.

★ [Learn more about adding alt text to an image](#)

Forms and links

Remove any forms from your rule document and replace these documents with direction for obtaining them, including links if appropriate.

★ [Learn more about making accessible hyperlinks](#)

Track changes

For proposed rules, use the track changes feature in Word to easily highlight the changes you are proposing. While you edit, you can hide the redlined text by changing the view, but make sure your final documents, including the PDF file, show the insertions and deletions.

★ [Watch this 1-minute video on using track changes in Word](#)

Check accessibility in Word

Use the accessibility checker in Word to identify all accessibility issues. To run the check:

1. Open the Word document
2. Go to the "Review" tab in the ribbon
3. Click "Check Accessibility"

★ [Watch this 1-minute video on running an accessibility check](#)

If your document has errors or warnings, the accessibility checker will give you guidance on what the issues are and how to fix them.

★ [Learn more about using the accessibility checker to fix issues](#)

Save the accessible Word file as a PDF

Saving a PDF without track changes

There are several ways to create a PDF file, including a right way and quite a few wrong ways. To save your local rules file as a PDF correctly:

1. Go to File > Save As
2. In the document type menu, where you see "Word Document (*.docx)" choose "PDF (*.pdf)"
3. Give the file a name, navigate to where you wish to save it, and click "Save"

Saving a PDF with 20 pages or more

If your document is more than 19 pages, your PDF file will need to have bookmarks. Make sure when you convert to PDF, in the options, you have "Create bookmarks using headings" selected. Follow steps 4-7 below to learn how to edit your save options.

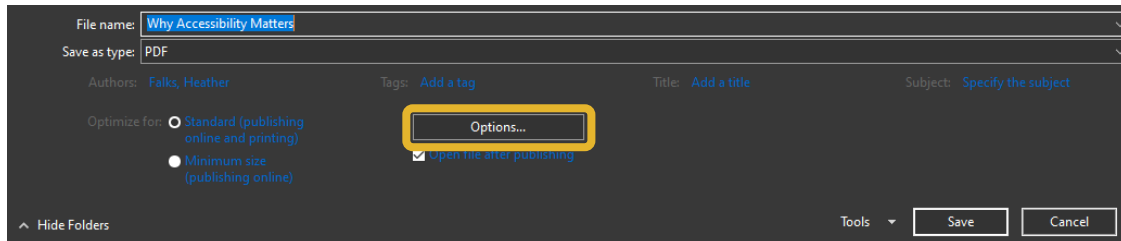
Saving a PDF with track changes

To save proposed local rules with tracked changes as a PDF, follow steps 1 and 2 above and then:

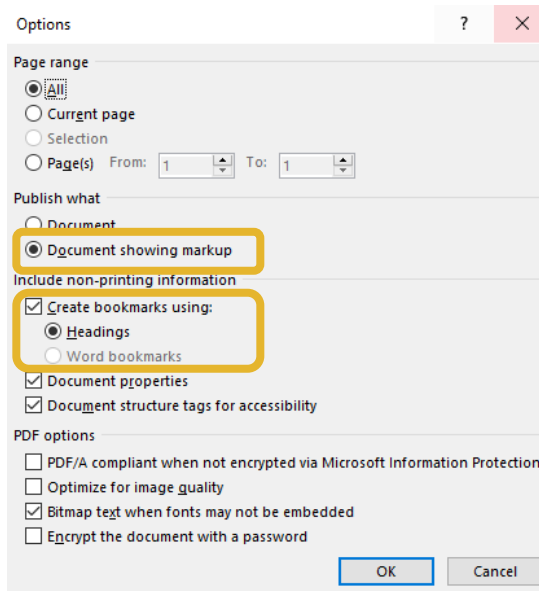
4. Click "More options"



5. In the save dialog window, click "Options"



6. In the Options dialog, make sure “Document showing markup” is selected (and if the file is longer than 19 pages, make sure you set it to “Create bookmarks using headings”)



7. Click OK, navigate to where you want to save the file, name it, and click “Save”

What about the wrong ways?

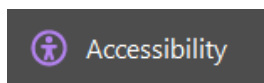
When creating a PDF, do not:

- print on paper and scan the pages to create a PDF
- go to file > print and choose Adobe PDF or Acrobat Distiller as the printer to create a PDF
- create an untagged PDF file

Check accessibility in Acrobat

Note: Adobe Acrobat is the standard tool for creating and editing PDF files, and these instructions are specifically for Adobe software. If you are using a different program to create PDF files, you will need to refer to that program's help documentation to learn about the accessibility tools available to you.

1. After you save the file as a PDF, open the file in Adobe Acrobat.
2. In the toolbar on the right, select “Accessibility” (if you don’t see it, you’ll need to add it by going to “More Tools” first)



3. In the Accessibility toolbar, click “Accessibility Check” then leave the default settings in place and click “Start Checking”
4. A list of issues will appear on the left, including the “Title – Failed” error, which will always appear in a new PDF

5. Right click that error and click "Fix" then give the file a title if the title field is blank (e.g., Morgan County Local Rules or Carroll County Proposed Local Rules 2023).

Note: Acrobat's accessibility check will always show some warnings labeled "Needs manual check." These are issues that the software indicates require human verification. Right-click on these warnings to learn more about them.

If your Word file passed an accessibility check and you followed the instructions for formatting above, then you should not have any accessibility issues. If your document does have errors, refer to [help from Adobe](#) or check out the additional resources below.

Additional accessibility resources

[Section508.gov](#) – Guidelines and tutorials on making accessible documents from the U.S. General Services Administration

[Microsoft accessibility](#) – Microsoft's main page for accessible content development

[Adobe accessibility](#) – Adobe's main page for accessible content development