

County/Local Retention Schedule Instructions

Indiana Archives and Records Administration (IARA)
County/Local Records Management

These instructions apply to all approved County/Local Records Retention Schedules.

1) Reference the Appropriate Retention Schedule

Check your [office-specific Retention Schedule](#). If no Record Series applies, consult the [County/Local General Retention Schedule \(GEN\)](#). If no applicable record series is identified, contact IARA at cty@iara.in.gov for assistance.

2) Copy of Record vs. Duplicate

- Copy of Record: The official version that fulfills all legal and retention requirements.
- Duplicate: Other versions that contain the same information that are not used to fulfill all legal and retention requirements.

Unless a Record Series says otherwise, duplicates may be destroyed at any time without permission.

3) Digitizing Records

Records may be digitized under [OCPR Policies 20-01](#), [Policies 20-02](#), and IARA's [Electronic Records Guidelines](#).

After verifying completeness and legibility, the digitized record may be used as the Copy of Record, and the original then is considered a Duplicate.

Destroy the digitized version (now the Copy of Record) only after:

- Meeting the retention period.
- Completing a [Notice of Destruction of County/Local Government Records \(SF 44905\)](#). (Once destroyed, send the completed form to the [County Commission of Public Records](#).)

4) Managing Permanent and Critical Records

It is a best practice to maintain a physical copy of Permanent Records. For Critical Records, it is a best practice to maintain two copies: a physical copy that acts as the Copy of Record and a second copy that can be in any of the following approved formats:

- Physical paper or electronic format.
- Verified microfilm (per 60 IAC 2).
- Verified digitized files (per OCPR Policies and Electronic Records Guidelines).

Unsure if your record is scheduled? Need help?

Contact cty@iara.in.gov or (317) 232-3380.

5) Storage Options for Permanent and Critical Records

A Copy of Record may be stored:

- In the office of origin.
- With a trusted storage provider.
- In approved State/Federal Systems that meet standards and guarantee permanent access.

Store second copy separately to ensure continuity.

6) Managing Unscheduled Records

Before submitting forms for the destruction or transfer of unscheduled records, contact IARA for guidance. Approval is required prior to taking any action on unscheduled records.

7) Electronic Records Assistance

If you have questions about born digital records that are, or for help duplicating records electronically, contact the Electronic Records Program at erecords@iara.in.gov.

8) Litigation Holds

No record may be destroyed or transferred if it is involved in or anticipated to be involved in:

- Litigation, Claims, Audits, Public Information Requests, and/or Administrative Reviews.

Destruction or transfer can only proceed after all related actions are fully resolved.

9) Additional Guidance

- Multiple Record Series: If a record fits multiple Record Series, follow the longest applicable retention period.
- Form Examples: Forms listed in Record Series descriptions are examples, not exhaustive.
- Item Numbers: Used for convenience and may vary in printed copies.
- State Forms: To document destruction or transfer.
 - [State Form 44905](#): To destroy records on a retention schedule.
 - [State Form 30505](#): To destroy unscheduled records or severely damaged records.
 - [State Form 57236](#): To transfer scheduled or unscheduled records to state or county/local entities.

Please refer to the County/Local Records Custodian Handbook for additional information:
<https://www.in.gov/iara/files/handbook-countylocalrecordscustodian.pdf>



TRANSMITTAL OF PROPOSED / APPROVED RECORDS RETENTION AND DISPOSITION SCHEDULE

State Form 39443 (R8 / 9-21)

Agency	Issued by:
County / Local Government	The Indiana Archives and Records Administration
Division (If left blank, retention schedule applies to entire agency.)	Records Management Division
Recorder Retention Schedule (RE)	402 West Washington Street, Room W472
Date sent (mm/dd/yyyy)	Indianapolis, IN 46204
N/A	rmd@iara.in.gov

SECTION I	PROPOSED RECORDS RETENTION AND DISPOSITION SCHEDULES
<p>Please have your Appointing Authority (agency head) sign this sheet <u>electronically</u> in the blank provided under Section III, to acknowledge approval of the proposed amendments. Then, return the electronic file to IARA's Records Management Division. You will be sent a copy of the final version of the schedule after it has been approved by the Oversight Committee on Public Records.</p>	

SECTION II	GENERAL INFORMATION
<p>An approved Records Retention and Disposition Schedule grants your agency the authority to transfer or destroy records on a continuing basis. Please consult the Records Coordinator and Records Center handbooks for transfer and destruction information, or contact the Indiana Archives or Records Center staff directly for guidance on their specific procedures.</p> <p>Any questions concerning how to interpret the instructions in your approved retention schedule should be directed to the Records Management Division at rmd@iara.in.gov.</p> <p>A retention schedule must be current to be effective. The Records Management Division will contact your Agency Records Coordinator for periodic reviews to ensure that both language and content are up to date. If your agency needs to change the schedule between those review periods, just contact the Records Management Division, and a new update project will be initiated immediately.</p>	

SECTION III	AGENCY APPROVAL
Agency Head e-signature	Not applicable; IARA acts as agency head

SECTION IV	APPROVED RECORDS RETENTION AND DISPOSITION SCHEDULES
<p>The Oversight Committee on Public Records, at its meeting held on <u>6/19/2024</u>, approved this Records Retention and Disposition Schedule for your agency.</p> <p>The finalized schedule is enclosed. The Records Coordinator should retain the original and forward copies to agency staff as needed.</p> <p>Indiana Archives and Records Administration e-signature of final approval <u>S. CW R Zghy</u></p>	



County Recorders Retention Schedule (RE)

INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
ENTRY OF INSTRUMENTS FOR RECORDING			
1	RE 10-01	ENTRY 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	RE 10-02	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 TRANSFERS			
3	RE 10-03	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	RE 10-07	QUIET 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 filings, date of final judgement and date judgment was recorded. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
5	RE 10-08	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 "Letters Patent (Land)" and "Lists of Land Entries." THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
6	RE 10-09	PLAT BOOK/PLAT 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	RE 10-10	INDEX OF NOTICES OF LIENS ON REAL PROPERTY	DESTROY fifty-five (55) years after satisfaction of lien.
8	RE 10-11	DORMANT MINERAL INTEREST RECORD A statement of claim filed under IC 32-23-10 to retain mineral rights on a property not owned by the claimant. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
MORTGAGE TRANSACTIONS			
9	RE 10-12	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.



County Recorders Retention Schedule (RE)

INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
10	RE 10-13	SCHOOL FUND MORTGAGE RECORD Record of mortgages given to secure repayment of money loaned from school funds. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
11	RE 10-14	RELEASE OF MORTGAGE RECORD Certificate of release of mortgage. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
LIENS			
12	RE 10-15	LIEN RECORD/INDEX TO LIEN RECORD Liens may include but are not limited to, Mechanic's, Hospital, Homeowner's Association, sewer, mowing, and other liens not imposed by the Internal Revenue Service.	PERMANENT. See Retention Schedule Instructions for format and transfer options.
13	RE 10-16	NOTICE OF FEDERAL TAX LIEN Form 668 (Y) (c). Retention based on 26 USC 6502.	DESTROY ten (10) years after last refile.
OLD AGE ASSISTANCE			
14	RE 10-17	ABSTRACT OF OLD-AGE CERTIFICATES -- LEDGER [1936-1945 and 1947-present.] Retention based on IC 12-14-16-6.	PERMANENT. See Retention Schedule Instructions for format and transfer options.
15	RE 10-18	CERTIFICATE FOR SUPPLEMENTAL ASSISTANCE TO AGED PERSONS	DESTROY twenty-five (25) years after satisfaction of lien.
MILITARY RECORDS			
16	RE 10-19	ARMED FORCES DISCHARGE RECORD (DD214) These records include any military discharge record of an Indiana citizen, 1864 to present. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
BUSINESS ASSOCIATIONS			
17	RE 10-20	ARTICLES OF ASSOCIATION AND INCORPORATION RECORD This official record of business entity filings includes formation documents, mergers, amendments, officer and agent updates, and name reservations. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
18	RE 10-21	INCREASE AND DECREASE OF CAPITAL STOCK These are the original filings of papers pertaining to increase and decrease of capital stock of companies.	PERMANENT. See Retention Schedule Instructions for format and transfer options.
19	RE 10-22	RESOLUTIONS OF CORPORATIONS AND ASSOCIATIONS These are the original filings of resolutions made by corporations and associations regarding business agreements. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
20	RE 10-23	REVOCATIONS These are the original filings of certificates issued by Secretary of State and filed with Recorder, revoking the business privileges of various incorporated firms. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
21	RE 10-24	CO-PARTNERSHIP RECORD / PARTNERSHIP AGREEMENTS Record of business partnership agreements and certificates of amendment, showing dates of instrument, amendment, or dissolution, names of partners and firm, kind and place of business, and articles of agreement or partnership. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.



County Recorders Retention Schedule (RE)

INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
MISCELLANEOUS INSTRUMENTS			
22	RE 10-25	MISCELLANEOUS RECORD These include transcripts of miscellaneous instruments such as affidavits, wills, agreements, articles of association and incorporation, amended articles, bills of sale, certificates, contracts, liens, dissolutions, inventions, leases, powers of attorney, and resolutions. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
23	RE 10-26	REGISTER OF FARM NAMES A record of the name of a farm and description of the land to which the name applies. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
24	RE 10-27	FENCE MARKS RECORD [IC 32-26-7-1]	PERMANENT. See Retention Schedule Instructions for format and transfer options.
25	RE 10-28	OFFICIAL BOND REGISTER Register of bonds filed by elected or appointed officers, officials, deputies, employees or contractors of a political subdivision, except the county recorder and deputies and employees of the recorder. For the individual elected official bonds, use Record Series GEN 10-25. THIS IS A CRITICAL RECORD.	PERMANENT AND CRITICAL. See Retention Schedule Instructions for format and transfer options.
UNIFORM COMMERCIAL CODE			
26	RE 23-01	UNIFORM COMMERCIAL CODE RECORDS Includes but is not limited to: information requests (UCC Form 11), financing statement files and indexes, and termination files. Records may exist in paper and/or electronic format.	DESTROY six (6) years after lapse or termination.
OFFICE ADMINISTRATION			
27	RE 10-34	RECORD OF INSTRUMENTS COPIED OR PROOFED County Form 138.	DESTROY after three (3) years and after receipt of STATE BOARD OF ACCOUNTS Audit Report and satisfaction of unsettled charges.
28	RE 10-36	MONTHLY MORTGAGE RELEASE REPORT TO COUNTY AUDITOR No longer created after the repeal of IC 36-2-11-24 in 2023; will be obsolete as of July 2028 when the last remaining records reach their disposition date.	DESTROY after five (5) years and after receipt of STATE BOARD OF ACCOUNTS Audit Report and satisfaction of unsettled charges.
29	RE 10-37	PICK-UP CARDS [PLATS] Form 26-5-1.	DESTROY after three (3) years and after receipt of STATE BOARD OF ACCOUNTS Audit Report and satisfaction of unsettled charges.



Record Series Update Overview - THIS PAGE IS NOT A RECORDS RETENTION SCHEDULE – it is only an overview of the updates that were made to the County Recorders Retention Schedule in 2024.

No background: This Record Series contains updates.

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
RE 10-28	RE 10-28 (But language has been updated)

SUMMARY
Amended: RE 10-28.

If you have questions about this overview or about the County Recorders Retention Schedule, please contact IARA's County Records Management section at 317-232-3380 or cty@iara.in.gov.

Record Series Update Overview - THIS PAGE IS NOT A RECORDS RETENTION SCHEDULE – it is only an overview of the updates that were made to the County Recorders Retention Schedule in October 2023.

No background: This Record Series contains updates.

Light Gray background: This Record Series is being deactivated.

Dark Gray background: This is a brand new item.

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
RE 10-01	RE 10-01 (But language has been updated)
RE 10-02	RE 10-02 (But language has been updated)
RE 10-03	RE 10-03 (But language has been updated)
RE 10-04	RE 10-03 (combining the records into the amended RS RE 10-03)
RE 10-05	RE 10-03 (combining the records into the amended RS RE 10-03)
RE 10-06	RE 10-03 (combining the records into the amended RS RE 10-03)
RE 10-07	RE 10-07 (But language has been updated)
RE 10-08	RE 10-08 (But language has been updated)
RE 10-09	RE 10-09 (But language has been updated)
RE 10-10	RE 10-10 (But language has been updated)
RE 10-11	RE 10-11 (But language has been updated)
RE 10-12	RE 10-12 (But language has been updated)
RE 10-13	RE 10-13 (But language has been updated)
RE 10-14	RE 10-14 (But language has been updated)
RE 10-15	RE 10-15 (But language has been updated)
RE 10-16	RE 10-16 (But language has been updated)
RE 10-17	RE 10-17 (But language has been updated)
RE 10-18	RE 10-18 (But language has been updated)
RE 10-19	RE 10-19 (But language has been updated)
RE 10-20	RE 10-20 (But language has been updated)
RE 10-21	RE 10-21 (But language has been updated)
RE 10-22	RE 10-22 (But language has been updated)
RE 10-23	RE 10-23 (But language has been updated)
RE 10-24	RE 10-24 (But language has been updated)
RE 10-25	RE 10-25 (But language has been updated)
RE 10-26	RE 10-26 (But language has been updated)
RE 10-27	RE 10-27 (But language has been updated)
RE 10-28	RE 10-28 (But language has been updated)
RE 10-29	GEN 10-25
RE 10-30	RE 23-01
RE 10-31	RE 23-01
RE 10-32	RE 23-01
RE 10-33	RE 23-01
RE 10-34	RE 10-34 (But language has been updated)
RE 10-35	GEN 10-10
RE 10-36	RE 10-36 (But language has been updated)
RE 10-37	RE 10-37 (But language has been updated)
RE 10-38	GEN 10-10
RE 10-39	GEN 10-04
RE 10-40	GEN 10-11



NEW RECORD SERIES	CREATED FOR...
RE 23-01	Uniform Commercial Code Records

SUMMARY

Amended: RE 10-01, RE 10-02, RE 10-03, RE 10-07, RE 10-08, RE 10-09, RE 10-10, RE 10-11, RE 10-12, RE 10-13, RE 10-14, RE 10-15, RE 10-16, RE 10-17, RE 10-18, RE 10-19, RE 10-20, RE 10-21, RE 10-22, RE 10-23, RE 10-24, RE 10-25, RE 10-26, RE 10-27, RE 10-28, RE 10-34, RE 10-36, RE 10-37.

Deactivated: RE 10-04, RE 10-05, RE 10-06, RE 10-29, RE 10-30, RE 10-31, RE 10-32, RE 10-33, RE 10-35, RE 10-38, RE 10-39, RE 10-40.

Brand New: RE 23-01

Please note changes to the cover, aka "Retention Schedule Instructions," as well. The phrase "See Retention Schedule Instructions for format and transfer options" in the retention schedule refers to the instructions on the cover page.

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