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County/Local Records & Information Management

402 W. Washington St. Rm W472

Indianapolis, IN 46204

e: [cty@iara.in.gov](mailto:cty@iara.in.gov) | ph: 317-232-3380

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  **Marvelous May, Records Custodians!**  

Better start your engines for May! I'm ready for summer. How about you? May is bringing the vibes. We threw a party for Edwin's 1st birthday, traveled to Seattle to see a close friend get married, and then, we end the month putting on a weekend long swing dance event. I'm exhausted just reading this!

## Last Month's Bulletin

In the April 2025 bulletin, discussion topics included the Taskforce Members Needed for AS/AU/TR Retention Schedule Revision!, CT & PPA Retention Schedules Approved!, April is Records & Information Management Month, and the Topic of the Month was Text, Email, & Social Media as Public Record.

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

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## News You Can Help With: Taskforce Members Needed for AS/AU/TR Retention Schedule Revision!

This year, IARA would like to revise these 3 schedules concurrently: the [Assessing Officials \(AS\)](#), [County Auditor \(AU\)](#), and [County Treasurer \(TR\)](#).

The 3 schedules were last updated in 2022 and early 2023, and there are already revisions needed to be made to all and since most of these offices work closely together, it makes sense to update them concurrently.

As assessors/auditors/treasurers, you know more about your records than I do and IARA needs that knowledge to update the retention schedules to the best of our ability. So, my question is...

**Would you be willing to join us and participate on the taskforce to revise the AS/AU/TR retention schedules?** If yes, please email [cty@iara.in.gov](mailto:cty@iara.in.gov).

**If I say yes, what do I have to do as a member of the taskforce?** The taskforce will meet once a month via Microsoft Teams for an hour roughly. The meetings may vary but the basis

of the taskforce is to review the schedules and see what needs to be updated, changed, removed, or added. You can participate as little or as much as you like. The taskforce is mainly a way for IARA to gather information on the records you all are creating and then apply that to improve the retention schedules.

## News You Can Use: Text, Email, & Social Media Webinar is LIVE!

Remember that Records Management webinar for Texts, Email, and Social Media we mentioned in April? Great news - you can now watch it on-demand at your convenience [here](#).



## RIM Topic of the Month: Responsible Records Destruction

Proper records destruction is a vital part of responsible records & information management. When records have met their retention requirements, it's not enough to simply toss them in trash - they must be destroyed in a way that protects sensitive information and complies with legal requirements.

**Before destroying any records, keep a few important guidelines in mind:**

- **Follow the law.** Under Indiana Code 5-15-5.1-13, confidential records must be destroyed so that they cannot be read, interpreted, or reconstructed.
- **Be cautious with records.** Records subject to audit, litigation (pending or active), investigation, or a public records request, must not be destroyed, even if their scheduled retention date has passed.
- **Know your options.** You may retain records beyond the period outlined in the corresponding [retention schedule](#) if there is a legitimate business need - but

destruction should still occur securely once the records are no longer needed.

- **Choose vendors considerately.** County/local offices can use any vendor they choose. Whether destroying records internally or using a vendor, ensure records are securely stored until destruction. See [Vendor Qualifications](#) for more info.

### **When it is time to destroy records:**

- Paper records should be shredded or incinerated.
  - Avoid discarding public records in landfills or garbage sites. When using vendors, select reputable companies that offer cross-shredding for confidential materials to ensure proper security.
- Electronic records must be securely wiped, rendered irretrievable, or physically destroyed.
  - Be aware that standard deletion often doesn't permanently remove files. In most operating systems, deletion merely removes directory references while file contents remain on the drive until overwritten. Files in recycle bins or trash folders are especially easy to recover.

Also, remember to complete and retain [State Form 44905](#). If using a vendor, ensure that the destruction will be done in a secure, professional location and that you are able to request and receive a certificate or other proof that destruction took place. Keep these forms in accordance with the [County/Local General Retention Schedule](#) under Record Series GEN 20-01. Be sure to list the record series title and number exactly as they appear on the schedule - this helps prove the records were destroyed legally if ever questioned.

Records destruction is a final step in records management - not an afterthought. Done responsibly, it protects privacy, supports transparency, and reduces unnecessary storage costs.

For more guidance, visit [A Guide to Responsible Records Destruction for State Agencies and County/Local Offices](#) or email [cty@iara.in.gov](mailto:cty@iara.in.gov).

## **May Records Custodians Chat**

Our next Records Custodians Chat will be happening on the 28th.

### **Meeting Information**

**Date:** May 28th

**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 [.ics Outlook meeting file] 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 [.ics Outlook meeting file] 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 [your meeting number]** at the designated meeting time, then enter this PIN when prompted:  
**[your meeting PIN]**
2. We'll let you into the meeting.

### **To Join the Meeting by Computer**

1. **Click [your meeting link]here[/your meeting link]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**

**Records Management Liaison**

*Indiana Archives and Records Administration*

**o:** 812-929-3882

**e:** [achristiansen@iara.in.gov](mailto:achristiansen@iara.in.gov)

**w:** [www.in.gov/iara](http://www.in.gov/iara)

**a:** 402 W Washington St, Room W472, Indianapolis, IN 46204

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