

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

SECTION I	PROPOSED RECORDS RETENTION AND DISPOSITION SCHEDULES
Please have your Appointing Authority (agency head) sign this sheet electronically 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.	

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@lara.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
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.	
The finalized schedule is enclosed. The Records Coordinator should retain the original and forward copies to agency staff as needed.	
Indiana Archives and Records Administration e-signature of final approval	



Township Trustee Retention Schedule (TT)

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

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
1	TT 10-04	RESOLUTION RECOMMENDING SALARIES OF TOWNSHIP OFFICERS AND EMPLOYEES Form 17.	PERMANENT. See Retention Schedule Instructions for format and transfer options.
2	TT 14-01	TOWNSHIP ASSISTANCE APPLICATIONS AND ACTIONS May Include Township Forms TA-1 (Application for Township Assistance), TA-1A (Notice of Township Assistance Action) and TA-1B (Application for Additional or Continuing Township Assistance).	DESTROY after three (3) years and after receipt of STATE BOARD OF ACCOUNTS Audit Report and satisfaction of unsettled charges.



June 2024 Record Series Update Overview

THIS IS NOT PART OF THE RECORDS RETENTION SCHEDULE. It is only a detachable overview of the updates that were made to the Township Trustees Retention Schedule in (month year).

No background: This Record Series contains updates.

Light Gray background: This Record Series is being deactivated.

(Listed in the order in which they appear on the retention schedule to which this overview is attached.)

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
TT 10-01	GEN 24-01 (general obligation bond register)
TT 10-02	GEN 20-02 (Form 100R) or GEN 20-04 (Forms 15, TA-7, and other annual reports)
TT 10-03	GEN 10-11 (Form 1C and Form 80), GEN 10-01, GEN 10-24, or GEN 10-25 (Form 14).
TT 10-04	TT 10-04 (But language has been updated)
TT 14-01	TT 14-01 (But language has been updated)

SUMMARY

Amended: TT 10-04, TT 14-01

Deactivated: TT 10-01, TT 10-02, TT 10-03

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