Leaving Office
Recorder Virtual Meeting
July 2020

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.
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.

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.
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.

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
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

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.
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

Resources

• Indiana Recorders Association
  • Directory
  • Website
  • Recording Manual and Desktop Reference
  • Getting Started Guide

• Association of Indiana Counties
  • Website
  • Contact information
Resources

• State Board of Accounts
  • Website
  • Recorder’s page
  • Accounting and Uniform Compliance Manual and Bulletins
  • Contact information
    • counties@sboa.in.gov

• Indiana Gateway for Government
  • Website – gateway.ifonline.org
  • Help Desk – gateway@sboa.in.gov