

# County Officials Orientation Program (COOP)

## COAT Officials Checklist

for County Clerks, Clerks of Court, Registers of Deeds, and Trustees

- Oaths of office taken, signed, and filed with County Clerk.
- Surety bond is approved by the CLB, recorded with Register of Deeds, and filed with County Clerk. Note: the bond must be transmitted to the County Clerk for filing within either forty (40) days after the election or twenty (20) days (September 21st) after the term of office begins. If obtaining insurance instead of a bond, the certificate of insurance must be recorded with the Register of Deeds.
- Clerks of Court surety bond: is approved and certified by the appropriate court - Circuit/General Sessions, Criminal, or Chancery Court - entered into the minutes of the court, recorded with the Register of Deeds, and filed with the County Clerk.
- Review personnel policy - Check with County Clerk.
- Review county ethics policy - Check with County Clerk.
- Do not fire anyone or make any other personnel changes without checking with the county attorney.
- Determine if office is on the budgetary or fee system.
- Review bank accounts, petty cash, and contracts.
- Review county's current financial/purchasing policies.
- Review fixed asset inventory list. For decentralized counties, check with the mayor's office or budget office to get this list. For centralized counties, check with the finance or budget office for this list.
- Review current year budget (begins July 1st). Check the status to determine if budget is approved and adopted or in progress. Adopted budget can be found on file with the County Clerk. Note: New fee officials have thirty (30) days from taking office to file a salary suit or sign a letter of agreement.
- Review documented internal controls, risk assessments, and the office's list of capital assets.
- Do not throw anything away without checking with the records commission.