

AP 365 Student Records and File Management



RATIONALE:

To provide appropriate instruction and educational services, the District maintains information on students and their families. Pertinent information in these records shall be readily available to appropriate school personnel, be accessible to the parents or legal guardians of school-age students or to the student in accordance with legislation yet will be guarded as confidential information.

The records shall also be available with proper authorization, to a person planning for the delivery of, or delivering health, social, or support services to the student, or to the Board's insurer to the extent necessary to meet any claims being made against the insurance provided to the Board by that insurer. Such records are released on the understanding that the person receiving such information shall not disclose it except for the purpose intended.

The Superintendent or designate shall ensure the proper administration of student records in accordance with legislated requirements, as well as the need for efficient and safe collection and retention of student information.

1. Definitions

A Permanent Student Record (PSR) consists of:

- 1.1 the most recent Ministry form entitled "Permanent Student Record", and
- 1.2 all documents required to be listed as inclusions on the form entitled "Permanent Student Record" completed in accordance with the Ministry's "Permanent Student Record Completion Instructions," which are in effect at the time of the completion.

In addition to the PSR, a student's record (minimally) includes:

- 1.3 the student progress reports for the two most recent years, or a copy of the Transcript of Grades issued by the Ministry.
- 1.4 a written record of letter grades where letter grades are not set out in a student progress report for a student in grade 4, 5, 6, or 7.
- 1.5 the student's current IEP if any.

2. Procedures

2.1 Elements of Student Files

A General Student File (as part of the student record) shall be established and maintained for each student enrolled in the public education system. The student file will contain copies of current records used in the planning and administration of the student's education program. When necessary, a Confidential Student File will also be established and maintained to hold documents that are confidential or contain sensitive information. The student record consists of all information collected or maintained by the District pertaining to the student but does not include notes prepared by and for the exclusive use of a teacher or administrator.

2.1.1 The General Student File shall contain but not be limited to:

- 2.1.1.1 Demographic information includes legal name, birth date, legal guardianship, citizenship, and visa information if applicable, and other information as required by the Ministry.
- 2.1.1.2 A copy of school progress and achievement history
- 2.1.1.3 Individual Educational Plans/Student Learning Plans
- 2.1.1.4 Medical information
- 2.1.1.5 Court orders as indicated by legal alert
- 2.1.1.6 Other legal documents (i.e., name change or immigration document)
- 2.1.1.7 A reference to the location of any information that is being maintained outside the file.

2.1.2 The Confidential Student File shall contain but not be limited to:

- 2.1.2.1 Assessments reports prepared by Psychologist, Speech-Language Pathologist, Health Authority, medical professionals, etc.
- 2.1.2.2 Confidential reports
- 2.1.2.3 Documentation containing sensitive information
- 2.1.2.4 Documentation required to meet criteria for Ministry of Education and Child Care special education designation
- 2.1.2.5 School-Based Team referrals and meeting notes

Working files held by administrators, teachers and Support Services Staff that contain student information must be destroyed when it is no longer directly connected to the student's educational programming. Confidential reports must not be copied and placed in a working file. Recommendations from assessments reports can be copied and placed in a working file. Although working files are not considered part of a student's record, contents of the file can be requested under FOIPPA.

2.2 File Management

The principal is responsible for the establishment, maintenance, security, and access of a record (including hard copy and digital) for each student registered in their school.

- 2.2.1 Any information placed on a student's record must be done so with the knowledge:
 - 2.2.1.1 That the student, and their parent/guardian, as defined in the School Act, have access to all information contained in the student record
 - 2.2.1.2 That the information is considered to be official documentation of the District
- 2.2.2 The principal shall determine which school staff shall be authorized to access a student's record. As a guideline, staff access is to be limited to teachers and support

staff in direct contact with the student or staff with direct responsibility for the maintenance of student records.

- 2.2.3 As students and parents have access to the student files, care is to be taken to ensure that only appropriate documents are retained. The principal shall be responsible for the periodic culling of information from student records that have expired or are no longer of use to the school.
- 2.2.4 Disposal of student information shall be done in a way that preserves confidentiality such as confidential shredding.
- 2.2.5 The principal is responsible for the creation and annual review of specific school-level student record procedures to ensure clear communication is provided regarding staff roles and responsibility staff which include, but are not limited to, registration, receiving student records, transferring student records, file management, and storage of student records.

2.3 Transfer of Student Files

- 2.3.1 When a student transfers from one **SD 27 school to another SD27** school the original student records (consisting of Permanent Student Record Form, General Student File and, if applicable, the Confidential Student File) will be sent to the principal of the receiving school.
- 2.3.2 When a student transfers from one **B.C. public school to another**, upon request, the original student record (consisting of Permanent Student Record Form and the General Student File) will be sent to the principal of the receiving school through a secure digital transfer or Registered Mail. When a parent has provided a signature for the consent to release a Confidential Student File, this file will also be sent to the principal of the receiving school through a secure digital transfer or Registered Mail.
- 2.3.3 When a student is leaving the B.C. public school system to enroll in an **independent school, or a school outside the province**, upon request, a copy of the student record (including of Permanent Student Record Form, two most recent years of Student Progress Reports, and the current Student Learning Plan/IEP) will be sent to the receiving principal through a secure digital transfer or Registered Mail.
- 2.3.4 The original Permanent Student Record and related documents shall be maintained at the sending school.

2.4 Storage of Student Record

- 2.4.1 The Permanent Student Records and Official Transcripts must be retained by the District for 55 years after a student has withdrawn or graduated from school.
 - 2.4.1.1 Elementary – For students who have withdrawn or become inactive, Permanent Student Record Card must be kept at the school until the

individual reaches the age of 15 years old and then sent to the Board office for permanent storage.

- 2.4.1.2 Secondary - For students who have withdrawn or become inactive, Permanent Student Record Card must be kept at the school for three years and then sent to the Board office for permanent storage.
- 2.4.1.3 Graduated - the Permanent Student Record shall be stored at the school until the individual reaches 22 years of age then shall be forwarded to the Board Office for permanent storage. Transcripts are to be attached to the Permanent Student Record.
- 2.4.2 A student's General File shall be retained until a student reaches the age of 22 unless there are reasonable grounds to conclude that such records are to be maintained for a longer period (e.g., allegations of sexual abuse, accidents, or legal proceedings).
 - 2.4.2.1 Elementary - For students who have withdrawn or become inactive the file shall be stored at the school until the individual reaches, or would have reached, 15 years of age and then forwarded to the board Office where they will be stored until the individual reaches 22 years of age and then shall be destroyed in a confidential manner.
 - 2.4.2.2 Secondary - For students who have withdrawn or become inactive the file shall be stored at the school until the individual reaches, or would have reached, 22 years of age and then shall be destroyed in a confidential manner.
 - 2.4.2.3 Graduated – the file shall be stored at the school until the individual has reached 22 years of age and then shall be destroyed in a confidential manner.
- 2.4.3 A student's Confidential File must be retained by the District for 55 years after a student has withdrawn or graduated from school. Documents retained in the Confidential File after an individual has withdrawn or graduated will be as per the inclusions required on the PSR.
 - 2.4.3.1 Elementary - For students who have withdrawn or become inactive, the file shall be stored at the school for the remainder of the school year then forwarded to the Student Support Services for permanent storage.
 - 2.4.3.2 Secondary - For students who have withdrawn or become inactive the file shall be stored at the school for the remainder of the school year then forwarded to the Student Support Services for permanent storage.
 - 2.4.3.3 Graduated – The file shall be forwarded to Student Support Services for permanent storage.

Links:

[Authority: School Act, sections 79 \(3\) and 168 \(2\)\(t\) and \(k\) \(gov.bc.ca\)](#)

[Permanent Student Record Instructions - Province of British Columbia \(gov.bc.ca\)](#)

[Authority: School Act, sections 79 and 168 \(2\) \(gov.bc.ca\)](#)