

RECORDS MANAGEMENT



2021

Records Management Guide

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Welcome to Records Management

RECORDS MANAGEMENT GUIDE

INTRODUCTION

The schedules contained herein are the mandatory minimum retention periods for records that are associated with Public School Districts as defined by the Texas State Library and Archives Commission (TSLAC). No local government office may dispose of a record listed in this schedule prior to the expiration of its retention period. A records control schedule of a local government may not set a retention period that is less than that established for the record in this schedule. Original paper records may be disposed of prior to the expiration of their minimum retention periods if they have been microfilmed or electronically stored pursuant to the provisions of the Local Government Code, Chapter 204 or Chapter 205, as applicable, and rules of the Texas State Library and Archives Commission adopted under those chapters. Actual disposal of such records by a local government is subject to the policies and procedures of its records management program.

Destruction of local government records contrary to the provisions of the Local Government Records Act of 1989 and administrative rules adopted under it, including this schedule, is a Class A misdemeanor and, under certain circumstances, a third degree felony (Penal Code, Section 37.10). Anyone destroying local government records without legal authorization may also be subject to criminal penalties and fines under the Public Information Act (Government Code, Chapter 552).

Purpose

This manual is for all school district personnel who are involved in the process of retaining or accessing records on behalf of Mansfield ISD.

Resources

Texas State Library and Archives Commission - Schedule SD& GR

https://www.tsl.texas.gov/slrmlocalretention/schedule_sd

https://www.tsl.texas.gov/slrmlocalretention/schedule_gr

Yellow Folder- <https://erm.yellowfolder.com/login/#>

Record Storage (campus/dept)

Records need to be protected from fire, water, steam, structural collapse, unauthorized access, theft and other similar hazards and

1. Does not expose records to direct sunlight.
2. Records stored in a building or storage area shall be protected by an operational fire detection system or facility must be in compliances with local fire codes.
3. Records or storage boxes should not be stored in contact with the floor.
4. Records will be stored in district approved boxes.
5. Records will be organized, packed, and labeled in district approved method.

Record Storage Box Requirements (campus/dept)

1. Can be ordered from district approved office supplies vendor.
2. Standard 12x10x15 letter/ legal size records storage box with lid.

Packing Records (campus/dept)

1. Pack only the record series for one school year in each box. Records in the same records series, covering the same period, may be added to the box during the year.
 - a. When removing records from file cabinets, keep them in order.
 - b. If filed in numerical order- place lower number to the front of each box.
 - c. If filed in alphabetical order- begin with "A" in the first box.
 - d. For Grads and Withdrawals records only, no longer need the 6 inch space! Fill up your boxes but allow some movement.***
 - e. For Grads only- Health records & 504 records should be packed in their own box since they are not permanent records.***
2. If records in the file cabinets are not arranged in logical order that can be used for retrieving files, they must be put in order before packing boxes. Staff must be able to quickly and easily locate a file with a box.
3. Place letter and legal size records upright in the box, as they would normally be arranged in the file drawer.
 - a. Place letter size records in the box facing the front, toward the label.
 - b. Place legal size records in the box lengthwise, face the left hand side of the box if viewed from the front end the bottom of the page should be toward the label.
4. Storing binders and ledgers in records boxes is not recommended. However, if they are necessary to manage the records efficiently, stack the binders and ledgers on their sides or backs facing the lid of box. Do not stack above the hand holes.
5. Plastic folders, hanging files, rubber bands, binder clips and/or other costly filing supplies must be removed prior to storage.

Storage Box Label (campus/dept)

Storage label needs to be printed using a black or blue sharpie. A Red sharpie only to be used for the Box number only. *Box number – should read the first 3 numbers are your school/dept number, 2 numbers for budget year and 001 starting for the box number.*

Ex: 123 – 21-001

- Campus/Department: Write out Campus or department name
- Box Contents – Use Record Title description found on the Texas State Library website https://www.tsl.texas.gov/slrn/localretention/schedule_sd & detail record as needed for you.
- Box number in red sharpie – place box number within the Box content area on the lower right side.
- Date of Contents – the **FULL** school year of what is in the box (ex: 2020-2021)
- Boxed By – Print your name
- Destruction Date- Leave it blank, it will be filled out by the Distribution Center.
- Copies of labels are not acceptable.



RECORDS STORAGE LABEL

CAMPUS/DEPARTMENT: Mansfield HS - 003

RECORD TITLE (PER TSLAC): Student Records

DETAILS OF CONTENTS: Withdrawals, Grade 9, A - L

BOXED BY: M Carpenter

SCHOOL YEAR: 2 0 2 1 - 2 0 2 2

WAREHOUSE ONLY:

Box number must be written in RED marker

003 - 22 - 001

Each Box must be labeled with the official MISD Records storage label. Labels (Warehouse Item# 1GEN0425) may be ordered through Skyward and delivered by the warehouse.

Student Records – Permanent

1. Cumulative Records
 - Report Card/Grade Report K-8
 - Official Transcript & Report Card 9-12*
2. State Test Scores
 - TAKS*
 - STAAR*
 - TAAS*
 - SAT*
 - ACT*
 - ASVAB*
 - PSAT*
 - Readistep*
3. Consent to Share Student Information*
4. Special Programs
 - Bilingual (Green)
 - Dyslexic (Red)
 - At Risk Form
 - GT (Yellow)
 - 504 (Blue)
 - Legal (Orange/Blue)
 - Elementary Summer School (Purple)
5. Home Language Survey
6. Enrollment Forms

**Documents with an asterisk are required by the Texas State Library of Archived Commission as permanent records. All other documents are kept on a five-year retention period.*

DO NOT include in Student Permanent Record (Cumulative Folder)

- Cumulative Health Card or Record
- Immunization Exclusion Affidavits
- Verification of Mumps & Measles Illness
- Verification of Prior Testing (Hearing/Sight/spine)
- Immunization
- Migrant Form
- Proof of Residence

Inactive (Graduate/Withdrawn/No Show)

Keep for two years on campus

1. Grades K-8-Middle School

- Student Permanent Record Cumulative Folder (all criteria)
- Withdrawal form from Skyward
- Current grading period grades
- Last/most recent report card

2. Grades 9-12 (High School)

- Student Permanent Record Cumulative Folder (all criteria)
- Withdrawal form from Skyward
- Current grading period grades
- Last report card, transcript and Leaver Form

Withdrawal Form Rules

Do's

- Have teachers fill in grades for current grading period or write "See grades attached"
- Have complete signatures on Withdrawal Form (including parent signatures)
- Staple Withdrawal Form with Last

Don'ts

- Include multiple copies of record of achievement (report card/grade report) only one
- Include notes "will send grades w/TRex when requested"
- Leave Withdrawal Form Blank

To transfer records to the next campus

- You must use a record box to transfer your records.
- Do not use a label. Write directly on the box (same as area as label) "Records to transfer to *Campus name*".
- Enter a workorder on School Dude using Records Management. On the description box- enter Transfer records from "your campus to next *campus name*". Also, the number of boxes the warehouse will be picking up.

Graduate/Withdrawn (Grades 9-12)

1. Official Transcript of Grades/Report Card/Grade Report*
2. Exit Level Test Scores
 - TAKS*
 - STAAR*
 - TAAS*
 - SAT*
 - ACT*
 - ASVAB*
 - PSAT*
 - ReadStep

3. Withdrawal and Leaver Form*

**Documents with an asterisk are required by the Texas State Library of Archived Commission and TEA as permanent records.*

Records Management Register (campus/dept)

On the “Record Management Spreadsheet”, You will need to fill out the Box number, Record Title, Detail of contents, School Year and Boxed by para.

- Box number – should read the first 3 numbers are your school/dept number, 2 numbers for budget year and 001 starting for the box number. Ex: 123 – 21-001
The box number will be needed when requesting records on Eduphoria.
- Record Title & detail of contents- of what is in the box.
(https://www.tsl.texas.gov/slr/localretention/schedule_sd)
- School Year – the **FULL** school year of what is in the box (Ex:2020-2021)
- Boxed By – the person who put the information in the box.

RECORDS MANAGEMENT REGISTER – Campus Name			
Box Number	Record title & Detail of contents	School Year	Boxed By
001-18-001	Attendance Reports: A-Z , Aug - Dec	2017-2018	M Carpenter
001-18-002	Attendance Reports, A-Z, Jan - May	2017-2018	M Carpenter
001-18-003	Student Records: Withdrawals, Grade 9, A-L	2017-2018	M Carpenter
001-18-004	Student Records: Withdrawals, Grade 9, N-Z	2017-2018	M Carpenter
001-19-001	Student Records – 504 Program	2018-2019	M Carpenter
001-19-002	Budget: PO’s, receipts, Activity fund	2018-2019	M Carpenter

When spreadsheet is filled out and boxes are ready for pick up. The Records Management register will be emailed to Melida Carpenter. Every new school year, your box number will start over with 001.

Requesting Records (campus/dept)

- Go to Classlink
- Click on Eduphoria
- Click on Formspace
- Click on “submit new form” on bottom left.
- Record Management
- Select from options
- Fill in required information (Box number will be required)
- Use comment box to give more details
- Click on submit

Requesting Student Records to be pick up from Campus for Storage

Once your boxes are packed, labeled, spreadsheets have been completed and ready to be picked up from your campus.

- Email the Record Management spreadsheet to Melidacarpenter@misdmail.net
- Enter a School dude workorder, state how many boxes will be ready for pickup, what room boxes will be located in and a contact person and phone number.
- Use Records Management icon for picking up record boxes.
- Reminder that a list of student names must be in the box before it leaves your campus.

Destruction of Records (campus/dept)

A District record may be intentionally destroyed under any of the following conditions:

- The record is listed on a records control schedule filed with the State Library and Archives Commission and either its retention period has expired.
- The record appears on a list of obsolete records approved by the State Library and Archives Commission.
- Records are destroyed once a year.

School Dude (campus/dept)

A work order must be entered when you have Records boxes for storage, or boxes of student records going to the next grade level at anew campus.

- Use the icon “Records Management”
- the number of boxes to be picked up or transfer.
- Room number boxes are located in.
- A contact person and phone number.

Quick Reference:

1. **If I have any questions about the Cumulative Folder?** Call PEIMS
2. **If I have questions about request/returning Student Records?** Call Distribution Center
3. **If I have questions about Student Records-labels/storage?** Call Distribution
4. **What do you do if the person that handles Records is leaving the position?** Make sure to have them save the Records Management Register (spreadsheet) to one drive to a person that can give to the new person or save it on a flash drive.
5. **On the Records Management Register (spreadsheet), do I need a new spreadsheet for every time that I have to record boxes?** No, continue to use the same spreadsheet. You can always add a sheet to the same spreadsheet.
6. **How do I request a SchoolDude workorder?** Contact your School Dude Admin or to find out who it is on your campus, contact Kim Sherlock at 817-299-4345 or kimshelock@misdmail.org
7. **Records to be shred?** Campuses and departments are responsible for their own records. The Distribution Center no longer picks up records to shred.

Distribution Center

Brad Barker: 817-299-6454

Melida Carpenter: 817-299-6099

PEIMS

Paula Kiker (Elem) 817-299-6381

Tina Williams (Secondary) 817-299-7615

Quick Reference:

Retention Schedule (campus/dept)

Two Year Schedule		Three Year Schedule		Five Year Schedule		Seven Year Schedule	
school Years	Destruction Date	school Years	Destruction Date	school Years	Destruction Date	school Years	Destruction Date
2015-2016	2018	2015-2016	2019	2015-2016	2021	2015-2016	2023
2016-2017	2019	2016-2017	2020	2016-2017	2022	2016-2017	2024
2017-2018	2020	2017-2018	2021	2017-2018	2023	2017-2018	2025
2018-2019	2021	2018-2019	2022	2018-2019	2024	2018-2019	2026
2019-2020	2022	2019-2020	2023	2019-2020	2025	2019-2020	2027
2020-2021	2023	2020-2021	2024	2020-2021	2026	2020-2021	2028
2021-2022	2024	2021-2022	2025	2021-2022	2027	2021-2022	2029
2022-2023	2025	2022-2023	2026	2022-2023	2028	2022-2023	2030
2023-2024	2026	2023-2024	2027	2023-2024	2029	2023-2024	2031
2024-2025	2027	2024-2025	2028	2024-2025	2030	2024-2025	2032
2025-2026	2028	2025-2026	2029	2025-2026	2031	2025-2026	2033
2026-2027	2029	2026-2027	2030	2026-2027	2032	2026-2027	2034