

Olympia School District

2021-2022 School Year

SCHOOL RECORDS MANAGEMENT QUICK GUIDE

\*This is not intended to be a comprehensive list of all school and/or district records subject to scanning and retention. A broader list is available on the [Records Retention Website for OSD](#) and is updated annually or as items are revised by the Secretary of State. If there are specific records that need to be included on this guide, please contact the Records & Archives Department at Knox.

Student Records					
RECORD DESCRIPTION	WHERE TO ARCHIVE	EXAMPLES	WHO IS TO ARCHIVE	REQUIRED BY STATE OR DISTRICT	ADDITIONAL COMMENTS
<b>504 Plans / Confidential Student Reports</b>		Individualized Learning Plan	District	State (as per GS50-04C-01 in CORE)	Maintained in IEP online SPED
<b>Absence Case File</b> (Truancy)  <i>Attendance Letter</i>	<b>Treeno: Attendance Letters</b> , by SY	Letters prior to referral to BECCA	School	State (as per SD51-04-10 in Student Attendance)	School should maintain in Skyward - If not entered into Skyward, please scan paper documentation.
<b>Absence Excuse</b>  <i>Absence Notes Attendance Notes</i>	<b>Treeno: Attendance Notes</b> , by SY	Parent notes	School	State (as per SD51-04-01 in Student Attendance)	Information entered into Skyward does not require scanning. Paper documents should be scanned in a manner to ensure there is no overlap or obscured documents.  Recommend scanning weekly.
<b>Absence Notification</b>  <i>Email from School Messenger Phone Log</i>	<b>Treeno: Attendance Input, Daily/Period</b> , by SY	Completed Phone Log  School Messenger Report with follow-up contact information	School – archive daily handwritten log in Treeno  District– School Messenger reports.	State (as per SD51-04-02 in Student Attendance)	School notifies parent of student absence via School Messenger or personal phone call. If personal phone call, note in Skyward. <b>No documentation required if School Messenger reaches all students.</b>
<b>Accident Claims/Incident Reports-Student</b>	Treeno: Student / Accident Reports		District	State (as per GS50-02-04 in CORE)	Send accident reports to Wendy Couture for archiving

<b>Admit Slips</b> Tardy Slips	<b>Treeno: Attendance Input, Daily/Period, by SY</b>	Approved permission to return to class	School	State (as per GS50-02-05 in Transitory Records)	Retain for school year, then Scan into Treeno at the end of daily attendance and shred
<b>Aesop Reports</b>	<b>Treeno: Aesop Reports</b>		School		Aesop reports are scanned monthly by payroll, but must be scanned by the schools if they are being used as a form of work verification.
<b>Athletic Student Records</b>	<b>Family ID &amp; Treeno: Athletics by Mo/SY</b>		Under Review	State(as per SD51-06c-31)	Current processes are under review by district Administration with Family ID being used for all electronic athletic records; Any paper records in buildings should be boxed by school year in individual banker boxes and sent to district office at the end of each school year until further notice.
<b>Approval for Use of Private Vehicles for Student Transportation</b>	<b>Treeno: Permission Slips – Misc, by SY</b>	Parent permission slip to drive on field trip or for athletic events	School	State (as per SD51-06C-31, GS50-01-10, GS2010-081 & GS50-01-10)	Retain for 6 years; Batch scan
<b>ASB Bylaws &amp; Minutes</b> (Permanent Record)	<b>Treeno: ASB Minutes, by SY</b>	ASB Minutes 2017-18 bylaws	School	State (as per GS50-05A-01 & GS50-05A-13 in CORE)	Fiscal Officer completing ASB transfers must attach minutes to approve authorization.
<b>Attendance Input, Daily Period</b>	<b>Treeno: Attendance Input, Daily/Period, by SY (if paper copy)</b>	Day Summary	School	State (as per SD51-04-05 in Student Attendance)	Any attendance taken in Skyward by a teacher is retained in Skyward automatically.  Any attendance taken by hand must be entered into Skyward AND paper copy scanned to Treeno. Recommend setting up subs in Skyward.
<b>Attendance Records, Individual Student</b>  Supports enrollment report.			District - via Skyward	State (as per SD51-04-14 in Student Attendance)	District maintains in Skyward
<b>Authorization for Release of Student Records</b>	<b>Treeno: YR End Request for</b>	Individual request forms	School may enter into Skyward - NO	State (as per SD51-05F-02 in Student Records)	School may enter into Skyward. Otherwise, please scan original

<b>Request Form &amp; Records Log</b>	<b>Records Log, by SY</b>	Records request logs	Scanning Required.		documentation containing signatures into Treeno end of year.
<b>Application for Home/Hospital Tutoring</b>	<b>Treeno: Student / Health</b>		District	State (as per SD51-09-01 in Teaching Records)	Original/Primary Copy retained by Knox Staff SPED.  If school has a copy, it should be retained in the student's Health Folder.
<b>Boundary Exceptions</b> Transfer Requests	<b>Treeno: Transfer Requests, by SY</b>	Records documenting Inter-district and Intra-district transfer requests	District	State (as per SD51-05J-02 in Student Assignment)	Managed by Angela Nadeau at Knox
<b>Bus / Pick-up Changes – Temporary Authorization</b>	<b>Treeno: Transportation Notes, by SY</b>		School	State (as Per SD51-04-14 in Student Attendance/Absence)	Notes/emails/call logs from parents should be scanned by the school monthly. Internal transportation slips will be scanned by the Transportation Office.
<b>Bus Incidents / Referrals: Improper Conduct</b>	<b>Treeno: Student / Discipline</b>	May show bus route, time of incident, nature of incident, and student(s) name(s).	Transportation	State (as per SD51-05G-13 in Transportation)	To be archived by the Transportation Office. Ensure information is put in Skyward in addition to scanning into Treeno.
<b>Certificate of Exception</b>	<b>Treeno: Students / Health</b>	Immunization/Exemption Reporting Compliance	School: Health room Staff	State (as per SD2012-065 in Student Assignment)	Health Room Assistants should enter into student health profile in Skyward for new students in 2021-forward. Existing students with exceptions should be filed in Health File for later scanning by Health Room Assistant as time permits and assistance from District Office
<b>Certificate of Immunization Status (CIS)</b>	<b>Treeno: Student / Immunizations</b>	Dept. of Health Form No. 348-013	School: Health Room Staff	State (as per SD51-09-02 in Health Services)	Health Room Assistants should enter into student health profile in Skyward for new students in 2021-forward. Existing student records should be filed in health file for later scanning by Health Room Assistants as time permits and with assistance from District Office

<b>Child Abuse Reports</b>			District	State (as per SD51-09-03 in Reporting)	All Child Abuse Reports are to be sent to the Superintendent's Office immediately and will archived by Executive Assistants
<b>Confidential Student Files Principal or Counselor Folders Principal/Counselor/Psych ologist/ Therapist/Intervention Team Files</b>		May include subjective reports and anecdotal information from district, outside agencies and individuals. See Special Education Student History file for IEP, Eval and other Spec Ed records.	Individual employees	State (as per SD51-05f-03 in Student Records)	Any confidential notes kept by School Psych's and or therapists are their records and they should manage those records accordingly.
<b>Cumulative Folders*</b> <b>District will be conducting feasibility study to determine moving to fully digital files 2022-2023</b>	<b>Treeno: Student profile, Cumulative Folder</b>	All accumulated folder contents	District	3 year retention then shred SD51-05f-07	Schools may scan folders once a student leaves or withdraws and shred the folder to avoid storing. Otherwise, paper folders must be kept in school for 2 school years once a student withdraws or leaves the district; Folders should be sent to Knox Records in the 3rd year and for all graduated students
<b>Curriculum Waiver Requests</b>	<b>Treeno: Students /</b> appropriate tab based on type of document	Documents received from parent/legal guardian excusing student from specific classes (i.e., Physical Education because of injury, Sex Education curriculum, HIV/Aids curriculum, etc.)	School: Principal's designee	State (as per SD51-06A-11 in Curriculum)	Paper records scanned to student profile in Treeno under appropriate tab if not already noted in Skyward.

<b>Discipline Files Student</b>	<b>Treeno: Inactive students records Discipline</b>	All discipline records for students	School	State(SD2020-005;51-05F-08)	Current student records filed in student profile in Skyward; Inactive students filed in Treeno under discipline
<b>ELL Program Files</b> Copies of ELL Program documents for INACTIVE and INELIGIBLE students only			District	State (as per SD51-06A-02 in Curriculum)	Heather Randolph at District office will retain original file(s)
<b>Emergency REUNIFICATION</b>	<b>Treeno: Disaster Release Forms, by SY</b>		District	State (as per GS2012-024 in Emergency Planning, Response, Recovery)	Report Scheduled Monthly, no regular scanning required. In the event of a disaster, all applicable used and unused documents must be retained.
<b>Handbook Student Directory and Privacy Release</b>	<b>Treeno: Student Directory and Privacy Release Forms, by SY</b>		School	District	Batch scan end of SY alphabetically; Done automatically if through Skyward portal
<b>Field Trip Authorization by Parent/Legal Guardian</b>	<b>Treeno: Permission Slips – Field Trips, by SY</b>		School	State (as per SD51-06C-31 in Student Attendance/Absence)	District will be moving to electronic form in the future, but in the interim, continue scanning and filing forms by month in which field trip occurred
<b>Film Viewing / Internet Usage Parent/Legal Guardian Permission Slips</b> <i>Acceptable Use Form</i>	<b>Treeno: Permission Slips – Misc, by SY</b>		School	State (as per SD51-06A-12 in Curriculum)	Batch scan by end of school yr; Done automatically if through Skyward portal
<b>Health Card/Folder</b> <b>Health Registration Form</b> <b>Yellow Card</b>	<b>Treeno: Students / Health</b>	This records series includes the Health Registration Form.  May include, but is not limited to, screening results, data recorded from information	School: Health Room Staff	State (as per SD2012-071 in Health Services)	Beginning 2021-2022, Health Room Assistants are working to upload data into Skyward under the student's health profile for new students. Existing student records held in paper folders will be uploaded to Treeno under the student's profile, health tab, as time permits by Health Room Assistants with support from District Office Records Staff as requested until all paper records are uploaded.

		submitted by physician, parent/legal guardian, and record of notification to parent/legal guardian.			
<b>Health Room / Nurse Encounter Treatment Card</b>	<b>Treeno: Students / Health</b>		School: Health Room Staff	State (as per SD2012-071 in Health Services)	Health Room Assistants uploading to Skyward Health profile for new students beginning 2021-2022; District will provide support as requested to get paper items entered into Treeno for existing students.
<b>Health Room Registry Log</b>	<b>Treeno: Health Room, by SY</b>	Log of reporting to health office because of illness/injury	School: Health Room Staff	State (as per SD-09-05 in Health Services.)	
<b>Health Screening Results</b>	<b>Treeno: Students / Health</b>	Includes the following tests: Scoliosis, Vision, Hearing	School / District	District	Health Room Assistants uploading to Skyward Health profile for new students beginning 2021-2022; District will provide support as requested to get paper items entered into Treeno for existing students.
<b>Home School-Declaration of Intent by Parent/Legal Guardian</b>		Annual statement of intent by parent / legal guardian to provide full-time or part-time home-schooling for an individual student.	District	State (as per SD51-09A-05 in Home-Based Instruction)	Send to Executive Assistant at Supt Office by grade level for upload to Skyward
<b>Individual Health Plan</b>	<b>Treeno: Students / Health</b>	For students with Life-Threatening Health Conditions	School: Health Room Staff	State (as per SD2012-071 in Health Services)	Form must be scanned into Skyward by Health Room Assistants.
<b>Medication Administration Daily Log</b>	<b>Treeno: Health Room, by SY</b>	A chronological listing of dosages administered	School: Health Room Staff / District	State (as per SD51-09-08 in Health Services)	Health Room Assistants uploading to Skyward Health profile for new students beginning 2021-2022; District will

					provide support as requested to get paper items entered into Treeno for existing students.
<b>Medication/Health Procedures</b>  Health Information Form  Authorization to administer medication	<b>Treeno: Students / Health</b>	Administration Case Files includes physician/parent/legal guardian authorization for medication/health procedures administration and account of number and dosages administered	School: Health Room Staff / District	State (as per SD2012-071 in Health Services)	Health Room Assistants uploading to Skyward Health profile for new students beginning 2021-2022; District will provide support as requested to get paper items entered into Treeno for existing students.
<b>Military Affiliation Form</b>	<b>Treeno: Military Affiliation Forms</b>	Military Affiliation Form	School		Part of Handbook; batch scan in Treeno by YR end
<b>OSD Student/Parent/Legal Guardian's Rights &amp; Responsibilities Handbook Acknowledgement Form</b>	<b>Treeno: OSD Rights &amp; Responsibilities Handbook, by SY</b>	.	School	District	Part of Handbook; Signature page only should be uploaded in Treeno by YR end
<b>Parent/Legal Guardian Misc. Permission (e.g. after-school program)</b>	<b>Treeno: Permission Slips – Misc, by SY</b>		School	State (as per SD51-06C-31 in Student Attendance / Absence)	Batch scan in Treeno by end of YR
<b>School Bulletins &amp; Newspapers</b>	<b>Treeno: Daily Bulletins or Newsletters, by SY</b>		School	State (as per GS50-06F-04 in Forms and Publications)	Information posted on district website or generated electronically does not require further archival. Paper items should be batch filed in Treeno by end of YR
<b>Student Disciplinary Action Report &amp; Files Individual Student</b>	<b>Treeno: Student / Discipline</b>		School - only archive paper notes in Treeno.	State (as per SD51-01-50 & SD51-05F-08 in Student Records)	Paper records routinely uploaded to student discipline section in Skyward
<b>Student Records Directory and Privacy Form</b>  Demographic Distribution	<b>Treeno: Student Directory and Privacy Release Forms, by SY</b>	OSD Release of Directory Information	School may enter into Skyward - NO	District	School may enter into Skyward - NO Scanning Required. If not entered into Skyward, please scan documentation.

			Scanning Required.		
<b>Student Sign In / Out Logs Late Arrival/Early Departure</b>	<b>Treeno: Student Logs – Late Arrival/Early Departure, by SY</b>	Typically a handwritten log filled out by parents and/or students	School	State (as per SD51- 04-14 in Student Attendance)	Scan monthly and archive in Treeno.
<b>Student Registrations including address verifications, Birth Certs</b>	<b>Treeno: Student Profile</b>	Paper cards only	District	State (as per SD51- 05J-040)	Electronic registration forms maintained through Skyward; Paper documents used for verification and signed forms should be filed by student with cumulative folder items for upload to Treeno when student graduates or leaves the district.
<b>Transportation Bus Roster</b>			District		Retained in Transfinder.
<b>Volunteer Driver Forms</b>	<b>Treeno: Permission Slips – Misc</b>		School	State (as per SD51- 06C-31, GS50-01- 10, GS2010-081 & GS50-01-10)	Maintain batch scan in Treeno
<b>Withdrawal/Transfer Form-Secondary From parent/guardian</b>	<b>Treeno: Student / Enrollment</b>		School	State (as per SD51- 05F-07 in Student Records)	Skyward