

Olympia School District

2023-2024 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 Office of Vital Records & Archives at Knox using the help-records@osd.wednet.edu ticketing system. All records that have retention for which you intend to Scan and Toss must be logged on the district's [Scan & Toss Log Form](#).

Common Student & School Records*:

RECORDS MAINTAINED IN DIGITAL FORMAT IN SKYWARD DO NOT NEED TO BE PRINTED AND RESCANNED TO DOCUPHASE, ONLY ORIGINAL PAPER VERSIONS NEED TO BE ARCHIVED WITH THE EXCEPTION OF GRADUATION LISTS OR ELECTRONIC RECORDS HELD IN NON-LEGACY SOFTWARE SYSTEMS WITH LONG TERM RETENTION BY THE DISTRICT (AS NOTED)

RECORD DESCRIPTION	WHERE TO ARCHIVE	FREQUENCY	EXAMPLES	WHO IS TO ARCHIVE	REQUIRED BY STATE OR DISTRICT	ADDITIONAL COMMENTS
504 Plans / Confidential Student Reports	IEP ONLINE	Immediate	Individualized Learning Plan	District	State (as per GS50-04C-01 in CORE)	Maintained in IEP online through SPED
Absence Case File (Truancy) <i>Attendance Letter</i>	Docuphase (formerly Treeno): Attendance Letters, by SY	Monthly	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 to student profile in Docuphase.
Absence Excuses <i>Absence Notes Attendance Notes Student Tracking</i>	Docuphase (formerly Treeno): Attendance Notes, by SY	Weekly	Parent notes	School	State (as per SD51-04-01 in Student Attendance)	Information entered into Skyward does not require scanning unless there are supporting unscanned/uploaded paper documents. Paper documents should be batch scanned with daily attendance in a manner to ensure there is no overlap or obscured documents. Attendance notes are back-up documents to support student tracking.

Absence Notifications Email from School Messenger Phone Log	Docuphase (formerly Treeno): Attendance Input, Daily/Period, by SY	Immediate	Completed Phone Log School Messenger Report with follow-up contact information	School – archive daily handwritten log in Docuphase (formerly 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. No documentation required if School Messenger reaches all students.
Accident Claims/Incident Reports-Student	Docuphase (formerly Treeno): Student / Accident Reports	Immediate		District	State (as per GS50-02-04 in CORE)	Send accident reports to Safety and Risk Manager at SSC for filing/archiving
Admit Slips Tardy Slips	Docuphase (formerly Treeno): Attendance Input, Daily/Period, by SY	Weekly	Approved permission to return to class	School	State (as per GS50-02-05 in Transitory Records)	Batch scan into Docuphase (formerly Treeno) at the end of daily attendance and shred.
Aesop Reports	Docuphase (formerly Treeno): Aesop Reports	Monthly		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.
Athletic Student Records including: Health forms Eligibility forms Attendance records	Family ID & Docuphase (formerly Treeno): Athletics by Mo/SY	Monthly/Annually		School & District Technology	State(as per SD51-06c-31)	Any paper records in buildings more than 3 years old should be boxed by school year in individual banker boxes and sent to district office. Current FAMILY ID records should be maintained in Family ID. Retention is 3 years for eligibility forms including physicals; 6 years for schedules and attendance docs
Approval for Use of Private Vehicles for	Docuphase (formerly	Monthly	Parent permission slip	School	State (as per SD51-06C-31,	Retain for 6 years; Batch scan and label by event and date

Student Transportation	Treeno): Permission Slips – Misc, by SY		to drive on field trip or for athletic events		GS50-01-10, GS2010-081 & GS50-01-10)	
ASB Bylaws & Minutes (Permanent Record)	Docuphase (formerly Treeno): ASB Minutes, by SY	Monthly	ASB Minutes Or bylaws	School	State (as per GS50-05A-01 & GS50-05A-13 in CORE)	Fiscal Officer or designee completing ASB transfers must attach minutes to approve authorization monthly after each meeting.
Assessments* & Waivers *OSPI must archive	Skyward	Annually	All individual student test data	District	State (as per SD51-06A-17)	Maintained in Skyward; 3 year retention once student graduates or withdraws; waivers to testing must be kept 5 years after year granted
Attendance Input, Daily Period and all supporting notes or documentation	Docuphase (formerly Treeno): Attendance Input, Daily/Period, by SY (if paper copy)	Daily	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 and any supporting documents must be entered into Skyward AND paper copy scanned to Docuphase (formerly Treeno) if not maintained in Skyward student record as part of daily batch. Recommend setting up subs in Skyward.
Attendance Records, Individual Student Supports enrollment report.	Skyward	Daily		District - via Skyward	State (as per SD51-04-14 in Student Attendance)	District maintains in Skyward
Authorization for Release of Student Records Request Form & Records Log	Docuphase (formerly Treeno): YR End Request for Records Log, by SY	Monthly	Individual request forms Records request logs	School may enter into Skyward -otherwise, scan into Docuphase	State (as per SD51-05F-02 in Student Records)	School may enter into Skyward. Otherwise, please scan original documentation containing signatures into Docuphase (formerly Treeno) quarterly. It is recommended that schools keep a log of all requests and upload it to Docuphase with year end paperwork.

Application for Home/Hospital Tutoring	Skyward	Immediate		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 Profile in Skyward.
Birth Certificate (as part of cumulative record)	Skyward under E/W notes; Docuphase with Cumulative folder	Immediate		School or District	State (as per SD51-05F-07)	Upload to Skyward E/W notes or file in cumulative folder (paper copies) for later scanning and uploading once file is sent to district Records Office
Boundary Exceptions <i>Transfer Requests</i>	Docuphase (formerly Treeno): Transfer Requests, by SY	Immediate	Records documenting Inter-district and Intra-district transfer requests	District	State (as per SD51-05J-02 in Student Assignment)	Secondary records managed by Lisa Morrison at Knox Elementary records managed by Winnie Merrill Hicks at Knox
(Bus notes) Transportation Pick-up Changes – Temporary Authorization	Docuphase (formerly Treeno): Transportation Notes, by SY	Weekly		School	State (as Per SD51-04-14 in Student Attendance/ Absence)	Notes/emails/call logs from parents should be scanned by the school monthly into Docuphase. Internal transportation slips will be scanned by the Transportation Office.
(Bus) Transportation Incidents / Referrals: Improper Conduct	Docuphase (formerly Treeno): Student / Discipline	Immediate	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 Docuphase (formerly Treeno).
Certificate of Exception Immunization Exemption	Docuphase (formerly Treeno): Students / Health	Immediate	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 Assistants as time permits and District Records will provide support as needed.

Certificate of Immunization Status (CIS)	Docuphase (formerly Treeno): Student / Immunizations	Immediate	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 District Records will provide support as needed.
Child Abuse Reports	Docuphase: Student Profile, Child Abuse Tab	Immediate		District	State (as per SD51-09-03 in Reporting)	All Child Abuse Reports are to be scanned into Docuphase in the student's profile under the Child abuse and neglect tab then sent to the Superintendent's Office by level. All parts of the form should be filled out, especially the dates which trigger retention.
Confidential Student Files Principal or Counselor Folders Principal/Counselor/Psychologist/Therapist/Intervention Team Files		Immediate	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 personal records and they should manage those records accordingly until no longer needed, then shred.
Cumulative Folders (see Cumulative Folder Technical Guidance for more information on how to process monthly inactive files)	Docuphase (formerly Treeno): Student profile, Cumulative Folder	At enrollment, maintained throughout the year	All original accumulated file contents; Effort should be made not to print records maintained in Skyward and	District Records Office	3 year retention; retain signed originals SD51-05f-07	Cumulative folders for students who withdraw from the district should be boxed at the end of each month and sent to the district Records Office in a batch for scanning and archiving in Docuphase. You may place a Skyward Withdrawal report in the

			avoid stapling of documents			<p>box indicating contents or any exceptions.</p> <p>High School Graduating Senior Class Folders should be boxed and sent to the Records Office at the end of each school year by July 1. Please contact the Records Office with any exceptions.</p>
Curriculum Waiver Requests	Docuphase (formerly Treeno): Students / appropriate tab based on type of document	Monthly	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 Docuphase (formerly Treeno) under appropriate tab if not already noted in Skyward.
Discipline Files Student	Docuphase (formerly Treeno): Inactive students records Discipline ALL Active students maintained in Skyward	Immediate	All discipline records for students	School	State(SD2020-005;51-05F-08)	Current student records filed in student profile in Skyward as they occur; Inactive students or files more than 3 years old should be filed in Docuphase (formerly Treeno) under discipline tab so there is a reference if other schools make a records request.
ELL Program Files Copies of ELL Program documents for INACTIVE		Monthly		District	State (as per SD51-06A-02 in Curriculum)	Multilingual Coordinator at District office will retain original file(s)

and INELIGIBLE students only						
Emergency REUNIFICATION	Docuphase (formerly Treeno): Disaster Release Forms, by SY			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.
Enrollment P223 reporting	Docuphase, by SY in School Archive under P223 folder	Annually		School	State(as per SD51-01-37)	Maintain on site for 4 years or until audited then shred; OR Scan to Docuphase under P223 annually and you can shred once uploaded.
Handbook Student Directory and Privacy Release	Docuphase (formerly Treeno): Student Directory and Privacy Release Forms, by SY	Annually		District Records Office	District	If not captured in Skyward, scan as part of cumulative folder; Done automatically if through Skyward portal
Field Trip Authorization by Parent/Legal Guardian	Docuphase (formerly Treeno): Permission Slips - Field Trips, by SY	Monthly		School	State (as per SD51-06C-31 in Student Attendance/Absence)	Scan and file all forms, including health forms, by month in which field trip occurred by event. Health room assistants can batch scan health files that accompany students on field trips at regular intervals or by year end.
Film Viewing / Internet Usage Parent/Legal Guardian Permission Slips <i>Acceptable Use Form</i>	Docuphase (formerly Treeno): Permission Slips - Misc, by SY	Annually		District Records Office	State (as per SD51-06A-12 in Curriculum)	Scan as part of cumulative folder; Done automatically if through Skyward portal
Graduation Lists/supporting counselor notes for diplomas or grad status	Docuphase(formerly Treeno): By SY under Registrar folder	Annually		Registrars must upload student supporting docs (grad lists and notes);	State(as per SD51-05F-10)	Graduation lists and supporting documentation must be downloaded from Skyward and batch scanned at the end of each school year and filed in the Registrar file in Docuphase by yr

				Annual roll-up reporting of grads is done by SIS		
<p>Health Card/Folder</p> <p>Health Registration Form (online or paper versions)</p> <p>Immunization Records</p>	<p>Docuphase (formerly Treeno): Students / Health</p>	<p>Immediate</p>	<p>This records series includes the Health Registration Form.</p> <p>May include, but is not limited to, screening results, data recorded from information submitted by physician, parent/legal guardian, and record of notification to parent/legal guardian.</p>	<p>School: Health Room Staff</p>	<p>State (as per SD2012-071 in Health Services)</p>	<p>Beginning 2021-2022, Health Room Assistants will upload data during the school year into Skyward under the student's health profile for all new students IHPs. All other health records including existing student records held in paper folders will be uploaded to Docuphase (formerly 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 and phased out. All new students IHPs should be entered into Skyward moving forward in 2022-2023. Paper files can be kept on site, but documents contained therein must be maintained in Skyward as they occur each month. All inactive student health records not uploaded to Skyward may be scanned into Docuphase as the student exits, or sent in monthly with inactive cumulative files by school secretaries.</p> <p>Immunization records scanned to vaccination section of health tab.</p>

						Other Health Forms scanned to Docuphase.
Health Room / Nurse Encounter Treatment Card	Docuphase (formerly Treeno): Students / Health	Immediate		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.
Health Room Registry Log	Docuphase (formerly Treeno): Health Room, by SY	Immediate	Log of reporting to health office because of illness/injury	School: Health Room Staff	State (as per SD-09-05 in Health Services.)	Health Room Assistants upload to Docuphase end of each school year as a batch record
Health Screening Results	Docuphase (formerly Treeno): Students / Health	Immediate	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 Docuphase (formerly Treeno) for existing students.
Home School-Declaration of Intent by Parent/Legal Guardian	Upload in Entry/Withdrawal Notes section in Skyward for student's profile for enrolled students as applicable.	Monthly	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 originals to Executive Assistants at Supt Office monthly; Originals will be recorded into spreadsheet then sent to ORLA by Executive Assistants. District Records Office will Batch file annually in Docuphase at year end once received from ORLA. A copy should be placed in cumulative folder.
Individual Health Plan	Docuphase (formerly Treeno): Students / Health	Immediate	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. IHP section of the health tab
Medication Administration Daily Log	Docuphase (formerly	Immediate	A chronological listing of	School:	State (as per SD51-09-08 in Health Services)	Health Room Assistants uploading to Skyward Health profile for new students beginning 2021-2022;

	Treeno): Health Room, by SY		dosages administered	Health Room Staff / District		District will provide support as requested to get paper items entered into Docuphase (formerly Treeno) for existing students.
Medication/Health Procedures Health Information Form Authorization to administer medication	Docuphase (formerly Treeno): Students / Health	Immediate	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 Docuphase (formerly Treeno) for existing students.
Thurston County Offender Registry Updates as received	Recommend maintaining in a notebook at site level accessible to employees	Immediate	A listing of registered offenders located within the vicinity of the school or Central Office site provided by the County Sheriff's Office electronically	School & District	District	Principals or their designees should sign up to receive notifications from the County as registry occurs to be aware of potential threats around their schools, as appropriate. Notifications can be shredded at the end of each school year.
Military Affiliation Form	Docuphase (formerly Treeno): Military Affiliation Forms	Annually	Military Affiliation Form	District Records Office	District	Part of Handbook; will be scanned from cumulative folder by district
OSD Student/Parent/Legal Guardian's Rights & Responsibilities Handbook	Docuphase (formerly Treeno): OSD Rights &	Annually	.	District Records Office	District	Part of Handbook; Signature page only should be uploaded in Docuphase (formerly Treeno) by YR end as part of cumulative folder

Acknowledgement Form	Responsibilities Handbook, by SY					
Parent/Legal Guardian Misc. Permission (e.g. after-school program)	Docuphase (formerly Treeno): Permission Slips – Misc, by SY	Annually		District Records Office	State (as per SD51-06C-31 in Student Attendance / Absence)	Scan in Docuphase (formerly Treeno) by end of YR as part of cumulative folder
School Bulletins & Newspapers	Docuphase (formerly Treeno): Daily Bulletins or Newsletters, by SY	Annually		School	State (as per GS50-06F-04 in Forms and Publications)	Information posted on district website or generated electronically does not require further archiving. Paper items should be batch filed in Docuphase (formerly Treeno) by end of YR
Student Disciplinary Action Report & Files Individual Student	Docuphase (formerly Treeno): Student / Discipline	Monthly		School - only archive paper notes in Docuphase (formerly Treeno).	State (as per SD51-01-50 & SD51-05F-08 in Student Records)	Paper records routinely uploaded to student discipline section in Skyward. Records older than 3 years should be organized, boxed and sent to District Records Office for Docuphase uploading. Level of offense dictates how long to retain.
Student Records Directory and Privacy Form Demographic Distribution	Docuphase (formerly Treeno): Student Directory and Privacy Release Forms, by SY		OSD Release of Directory Information	School may enter into Skyward - NO Scanning Required.	District	School may enter into Skyward - NO Scanning Required. If not entered into Skyward, file in cumulative folder
Student Sign In / Out Logs Late Arrival/Early Departure	Docuphase (formerly Treeno): Student Logs – Late Arrival/Early Departure, by SY	Monthly	Typically a handwritten log filled out by parents and/or students	School	State (as per SD51-04-14 in Student Attendance)	Paper versions should be scanned monthly and archived in Docuphase (formerly Treeno).
Student Registrations including address verifications, Birth Certs	Docuphase (formerly Treeno): Student Profile	Annually	Paper forms only	District Records Office	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 Docuphase (formerly Treeno) when student graduates or leaves the district.
Transportation Bus Roster				District		Retained in Transfinder.
Transcripts and any requests for changes to grades; Logs of requests	Skyward 2000- Docuphase 1999-prior Requests, logs, corrections filed under Registrar folder in Docuphase	Annually		SIS, Registrars and District Records	State (as per SD51-05F-10)	Retain for 100 years after student graduates or leaves the district; Maintained in Skyward and Docuphase. Logs of requests for transcripts must be maintained annually by registrars and will be uploaded annually into Docuphase by District Records staff.
Visitor logs (all kiosk documented entry and exit logs)	Kiosk at school and any paper logs	Annually by Volunteer Coordinator		School & District Volunteer Coord	State (as per GS50-06B-20)	Must be logged in Kiosks at maintained for 3 years after end of school year in digital or paper format. Paper format filed monthly in Docuphase.
Volunteer Driver Forms	Docuphase (formerly Treeno): Permission Slips - Misc	Monthly		School	State (as per SD51-06C-31, GS50-01-10, GS2010-081 & GS50-01-10)	Maintain batch scan in Docuphase (formerly Treeno)
Withdrawal/Transfer Form-Secondary From parent/guardian	Docuphase (formerly Treeno): Student / Enrollment	Immediate		School	State (as per SD51-05F-07 in Student Records)	Skyward