PUBLIC SCHOOLS RECORDS CONSORTIUM

MEETING MINUTES

November 18, 2015

Attendees:

Georgia McGuigg, York County Crystal Ford, Hampton City Schools

Maralee Weeks, Stafford County Tammy Norman, Stafford County

Corey Smith, Library of Virginia Linda Trimble, Manassas City

Debbie Carroll, Manassas City Penny Norton, Newport News

Brandi Critzer, Fluvanna Angela Diggs, Williamsburg-James City

Glenn Smith, Library of Virginia Kim Salyers, Frederick

Meade Harris, Albemarle Ben Leek, Ricoh Commercial

**Welcome and Introductions:**

Meeting was called to order at 10:06. Introductions were made by all attendees to introduce themselves and the school division they represent.

Quick housekeeping was reviewed for new attendees and introduced Corey as the School Records Analyst at the Library. If you have questions about GS-21, those questions would be directed to Corey.

**Review of Schedules 16 (General Services) and 33 (Information Technology)**

Glenn Smith from the Library of Virginia was asked to join the meeting to answer questions about schedules 16 and 33.

Questions Schedule 16 for series Risk Management; there is no series number and it indicates to refer to another schedule and series. Question was asked why does the schedule have that series if it does not fall under it? Glenn has explained that due to the Infolinx program, the schedules can make reference. When you go to the search and find on the website, you can do a search. Glenn explained how schedules have been updated in Infolinx and only on the schedules that have been updated will include the series from now on, and other schedules will not have reference to the schedules anymore. Users still have to follow the old format if the schedules are not yet under the new format and have not been updated. Users must follow what is under the old retention signed sheets on the Library.

If the schedule does not have a series number you do not have to complete an RM3. However there are some that indicate an RM3 is not required, but you should consider completing one any way.

There are several schedules that need to be updated but with only 2 analysts there just is not time. There is not an ETA of when the remaining schedules will be updated to match the Infolinx format.

Question about security audits? How long should they be retained? That is something that will have to be researched and not able to answer in a meeting . Some things to consider when looking at audits; you have to find out if whoever is doing the audit, then that is who maintains the record. If the state is doing the audit you may not have to keep as it would only be for your division to reference. User would need to determine sometimes when things are going to the state to determine who has the record and who has the copy. If local policy indicates YOU have to do something with it, then what you do with it becomes the record.

Question on Workers comp…once the agency finds it is founded, it typically becomes financial records.

Question about Sign in sheets that indicate 6 months after last entry; what about the computer where visitors sign in? if one computer is used, you can continue to use as it will be 6 months after last sign in so if sign is continued you can keep it, but depends on what the advantage of disposing/keeping the record would be. By using certain words, the agency can control when the record gets destroyed.

When were the last schedules updated? Typically anything past July 2011 are new and been revamped. Schedules 16 and 33 have not been. The date of 2011 on schedule 16 is due to a series that was added..

Question if anyone had a policy book to share. Georgia has said she can share hers, but she does not have details to share. All of her regulations have to be updated. Go to records management templates at the Library of Virginia web site and that will help in creating policy and regulations. This was created and added last year. Keep in mind, just because a records title is there, does not mean you have to have or create the record. Fairfax County Public Schools has great policy and Nancy Tyler is a great resource. Virginia School Board Association does not have intention to update anything for records management. VSBA has a policy model and other districts can model theirs.

Glen made a review about how the list serves work and how to change your settings and that the edsig is a moderated group meaning the library analysts will release the questions as needed. Glenn asked that you put a signature block on your email. If you forward email it will not show email of sender, it will only show listserv email address.

Glenn asked if any questions on IT schedule. The Georgia asked if IT folks could actually follow the IT schedule. They can, but do most do it? Probably not was the response. The schedule is out of date, last updated March 2009.

**GS 21 Examination Records**

Can any of the series be combined? There are 11 references to examinations. A question was asked about a test, is that considered an exam, why or why not? Discussion followed and a response was that it is defined as to how your school district utilizes it and the business practice. It was discussed that if your school does not have exams, and test are typically part of scholastic work that is graded and returned, then it does not fall under exam retention and does not have a retention .

Question about a teacher keeping a test was asked. Is there retention for tests? Scholastic work is not found. Once grades are entered the grade becomes the record and the work itself is not a series.

What about papers with student’s ID and STI, is that need an RMS-3? Was answered that it is not the STI or number specifically that requires the RM3, it is how it recorded and categorized, although papers with these identifiers should be shredded if remaining in the custody of the teacher or school division.

Could Series 8179 and 8180 be combined? Recommendation was made to post this to list serve for responses to see if others agree and respond. Could possibility combine to reference over the course of the academic year or at the end of the academic year.

Question about “may include” wording on series definitions; this does not mean you have to keep it, or limits what you keep, or does not mean you have to even have it. Consideration should be made to “May instead of Must”. There also must be consistency for a series type across the organization to show business practice if there is a possible interpretation of the series.

Question; If only a few pieces of paper are being destroyed that fall into that series, how are they calculated for volume? Volume has to be rounded to the .10.

How does anyone control on site shredders and entering items for RM3 reporting and to know what is being shredded when? Most school districts go by trust and training. One has the schedules up by the shredders but how to determine quantity is a struggle still.

If immunization records are entered into an electronic system can the original be destroyed? Yes, because at that time you have considered the electronic to be your official record.

**Upcoming Work Sessions**

At the next meeting can people bring samples of the order of cumulative file and what might be in it so others can use and copy.

Upcoming work sessions-January student cumulative file records/management, order, training, auditing,

Penny Norton was asked to bring the 50 question survey for records knowledge. Lengthy conversation about how Penny trains the records staff at Newport News schools. Penny will bring other training materials and processes that she has used and created.

**Upcoming Meetings**

Federal monitor reviews coming to school districts for CTE and school nutrition. It was asked for folks to come from VDOE to go over what will be in the reviews and any records questions that attendees may have. Attendees asked if they could bring their CTE and school nutrition staff to that meeting and the answer was yes. Anyone is able to attend the meetings.

VDOE will be asked to come to meeting to review management of scholastic records. It is not completed yet. When it is, he will come, maybe to the March meeting.

Some asked if we could review HR records and financial records. It will be on the agenda for the next meeting.

Crystal brought handouts to show teachers and other staff a sample of a bulletin board for FERPA information that one of her schools used to explain to teachers and staff why records are handled confidentially. It is federal policy, not just school division.

The meeting was adjourned 12:58. The next meeting is scheduled for January 21, 2016.

Respectfully submitted,

Maralee Weeks