Virginia Public Schools Records Consortium (PSRC)
Chair: Nicholas Minor MinorN@pwcs.edu (Prince William County)

Library of Virginia, 800 E. Broad St. Richmond, VA 23219
Tshawna Threat, Records and Information Management Analyst
(teshawna.threat@lva.virginia.gov)

PSRC Meeting Minutes
Wednesday, March 5, 2025
10:00 AM-1:00pm

Meeting format: Hybrid (In-Person & Virtual)

Agenda:
1. Developing a Records Management Program
2. Updates from the Library of Virginia
3. SCView: District-Wide Solution for Records Management

Welcome and introductions: (in attendance)

Name	Organization	Name	Organization
Anita Vannucci	University of Virginia	Mandy Zayatz	Manassas City
Becky Moore	Fauquier	Maralee weeks	Stafford
Carolyne Karawa	Fairfax	Mary Fisher	King Geroge
Cindy Pikeral	Roanoke	Meade Harris	Albemarle
Crystal Jones	Hampton City	Melissa Sexton	Bedford
Cynthia Hurley	Tazewell	Michelle Brittigan	Albemarle
Darlene Gorman	Chesapeake City	Nicholas Minor	Prince William
David Lyon	Manasas Park City	Nivia Wukovich	Prince William
Denise Shifflett	Greene	Pam Stewart	Loudoun County
Eric Benoit	Stragetic Solutions	Patty Massengill	Dinwiddie County
Erin Scalph	King Geroge	Rae Henderson	Campbell
Holly Cobb	Hampton City	Renee Weir	Clarke
Jen Test	York	Sherry Pettis	Amelia
Jennifer Tindle	Franklin City	Susan Gardner	Williamsburg-James City
Jessica Hawks	Danville City	Tammy Norman	Stafford
Jessie Graham	University of Virginia	Teshawna Threat	Library of Virginia
Katina Keener	Glouscester	Tracey Beaver	Prince William
Laura Beth Mattson	Virginia Beach City	Wayne Lyle	Prince George
Lisa Martin	Virginia Beach City		
Lois Ritger	Virginia Beach City		

AGENDA for March 5, 2025 Meeting

VIRGINIA PUBLIC SCHOOLS RECORDS CONSORTIUM (PSRC)

Location: Library of Virginia (Richmond, VA) and Virtually on Zoom

Date: March 5, 2025

Time: 10:00 a.m. – 1:00 p.m.

Agenda Items

10:00 – 10:45

Welcome
Introductions
October and January Meeting Minutes
PSRC 2025-2026

10:45 – 11:45

Developing a Records Management Program
University of Virginia
Records and Information Management Team

Jessie Graham, Electronic Records Manager
Anita Vannucci, Senior Records Management Analyst

11:45 – 12:00

Break

12:00 – 12:15

Updates from the Library of Virginia

Teshawna Threat, Records and Information Management Analyst

12:15 – 1:00

SCView: District-Wide Solution for Records Management

Eric Benoit, Virginia Accounts Manager

Scheduled 24-25 Meetings. (Four meetings per school year)
In-person physical meeting location:
Library of Virginia, 800 E. Broad St. Richmond, VA 23219

- The meeting format will include Virtual Access (Online) at all meetings and Hybrid to include on-site as agreed for each meeting.
- Meetings are from 10am to 1pm with the Library of Virginia room scheduled until 2pm.

Meeting Chair:
   Nicholas Minor, Prince William County Schools
Meeting Coordinator - Planning & Speaker Outreach:
   Pam Stewart, Louden County Schools
Minutes:
   Meade Harris, Albemarle County Schools

Schedule
October 9, 2024   **(Hybrid Format)**
December 11, 2024 **(Hybrid Format)**
February 12, 2025   **(Format TBD)**
April 30, 2025   **(Format TBD)** **- Final meeting for 2024-25 school year**

PSRC notes and agendas will be shared via the Library of Virginia
PSRC website: https://www.lva.virginia.gov/agencies/records/psrc/

The meeting minutes from **October 9, 2024** were unanimously approved. However, due to the late posting and unavailability of the minutes prior to the meeting, a second approval at the March 5 meeting was taken. Meeting minutes were put on the floor for approval by Nicholas Minor, Chair, Prince William County.
   Motion to approve by Tracey Beaver   Prince William County
   Second by Meade Harris, Albemarle County and
       Holly Cobb, Hampton City
October Minutes were approved with no discussion or objection.

December 11, 2024 meeting minutes

Meeting minutes were put on the floor for approval by Nicholas Minor, Chair, Prince William County.

Motion to approve by Meade Harris, Albemarle County

Second by Holly Cobb, Hampton City

December Minutes were approved with no discussion or objection.

Meeting discussion:

Nicholas Minor began discussions regarding PSRC Leadership for the FY 2025-26 school year. **Nicholas Minor, Chair and Pam Stewart, for Planning are stepping down from leadership for next year**. **Please extend them your appreciation for their hard work in keeping things going smoothly throughout the year! Job well done!**

- School Year 2024-25 roles:
    - Nicholas Minor, Chair
    - Pam Stewart, Planning
    - Meade Harris, Meeting notes
- Most important is having someone to step up as Chair for next year. To date only one response has come in for leadership for next year. To be fair, this is a team effort and may overwhelm a single person, plus you need a team to effectively plan and coordinate meetings. We need additional volunteers.
- We only have 1 meeting remaining this school year.
- We need to have volunteers come forward for appointment before the end of the current school year. The commitment will be for one year for the 2025-26 school year. Planning will take place for next year at the next meeting.
- Anyone who wants to serve in any role for next year, please email Nicholas - MinorN@pwcs.edu
- Expert subject knowledge is not required, the team meets 4 times per year between meetings to establish an agenda and plan meetings plus coordination with presenters.

Presentation 1:

> **Developing a Records Management Program**
> **University of Virginia**
> **Records and Information Management Team**

Presenters: Jessie Graham and Anita Vannucci

University of Virginia. Recognized as one of the top colleges and universities in their records management abilities. Caroline Walters, who was not able to attend the presentation, was credited with substantial contributions toward getting the records program at UVA off the ground.

The full presentation has been uploaded to the PSRC site:

https://www.lva.virginia.gov/agencies/records/psrc/
Go to Past Meetings, Wednesday March 5, 2025 and select item titled Meeting Minutes.

Here is the direct full presentation link: Meeting Minutes

We all thank Jessie Graham and Anita Vannucci for a fantastic presentation! You can reach them at:

records@virginia.edu
recordsmanagement.virginia.edu

UNIVERSITY *of* VIRGINIA

More information can be found on the UVA website:

https://recordsmanagement.virginia.edu/

https://recordsmanagement.virginia.edu/general-records-management

The chat and caption files are attached to this document as addendums.

Updates from the Library of Virginia

Teshawna Threat, Records and Information Management Analyst
(aka T)

Update: PSRC Focus Group (short term cumulative file)

The group had its second meeting in February with discussions
continuing on challenges of increasing retention requirements from 5
to 7 years for SPED & short-term cumulative files.   T is working with
VDOE representative Sam Hollins with 2-way collaboration for
recommendations to address the additional 2 years of records storage.
Updates will be made at a future date.

Please email Teshawna.Threat@lva.virginia.gov with any questions or
clarifications.

Schedule Updates for GS-21.

T's goal is to have a major update to the GS-21 schedule by June, 2025
pending feedback from the PSRC. Documents have gone out regarding
updates recommended and the option to do an update this year
followed by another update next year will be based on feedback
received.   The intent is to minimize the number of times we touch GS-
21 while accounting for records accordingly.

- **School safety Audit Report**. Created by Dept of Criminal
  Justice Services where schools have a record copy and the
  original goes to DCJS (https://www.dcjs.virginia.gov/virginia-
  center-school-and-campus-safety/safety-survey). This gets
  the reports to parents and other parties sooner and directly
  from the school.   This needs to be added to GS-21.   This
  should be addressed by each school regarding process and the
  retention will be 5 years. The description is still in draft form.
  This series addition is non-debatable.

School Safety Audits: Raw Data (still determining retention with the Dept of Criminal Justice Services)

- o This series will account for the Virginia Crisis Management Plan Review and Certification and School Safety Inspection Checklist and Certification components used to generate the annual School Safety Audit conducted by the Dept of Criminal Justice Services. <u>This series addition is non-debatable</u>.

- **SPED raw data, notes for SPED students when working with their therapists or counselors**. A new series will be written for managing this data. The group will discuss the notes that are collected and come to a consensus on how long to keep these notes.

- **SPED and short-term cumulative files**.   Review of the short term series has shown a duplication of other series records (SPED and cumulative health record)   LVA is moving toward removing the SPED and other series mentioned and having the short term cumulative health series be inclusive of what is needed.   T suggested a separate LVA web page that addresses the SPED and short-term cumulative health records instead of a duplicative series.

   ELL records also in short term cumulative file series, also being removed due to duplication.

- **Short term cumulative file affected**.   Schools have requested other series to be included\combined in the 7-year series. Includes student discipline expulsion records, legal records, and threat assessments. Should these records be included? PSRC to discuss and T to do a poll to gather feedback and provide update before action.

- These GS-21 Series appear to mimic each other:
    - **Strategic Plan Series**
    - **Accreditation Record Series**

    LVA needs feedback from PSRC as to whether these should be combined.

Additional Inquiries

- **Can Academic Progress Records be combined with Grade Records Series?** Please provide your interpretation of these series and if they are duplicative.

    Your responses can be emailed to:
    Teshawna.Threat@lva.virginia.gov

Another poll:

There is also a proposal to change organization of GS-21 to organize student records and a separate out a new section for non-student records.   There must be massive buy-in for a major reorganization, so a poll will be forthcoming.

It is not likely feedback will be in place to justify a major change in GS-21 unless feedback is received in the next 30 days, so that process may be extended beyond June, 2025. It may be best to wait until the end of the year, so this may extend to June, 2026.

Presentation 2:

SCView: District-Wide Solution for Records Management

Eric Benoit, Virginia Accounts Manager

SCView is an Ohio based company that is new to the Virginia market. Eric was a native to Virginia and taught in the Virginia Beach Public Schools. SCView is a digital archive system.

The full presentation has been uploaded to the PSRC site:

https://www.lva.virginia.gov/agencies/records/psrc/

Go to Past Meetings, Wednesday March 5, 2025 and select item titled Meeting Minutes. The presentation is approximately 1 hour 45 minutes into the video.

Here is the direct full presentation link: Meeting Minutes

We all thank Eric Benoit for a fantastic presentation!

Closing Remarks from Nicholas Minor, chair.

Thank you for participating with the PSRC meetings.

Our final meeting is April 30.

- We will have a presentation by the FOIA Council.
- Tour of the Library.
- Vendor Presentation by John Riordan of Harvest Technology Group.

Please consider volunteering for next year.

Addendums on the following pages.

Addendum 1.

Meeting Chat from recording:

10:05:34   From Erin Scalph : I do not have a microphone on this computer but I am Erin Scalph, Records Officer at King George County Schools

10:07:30   From Sherry Pettis : Sherry Pettis Amelia County Public Schools, Coordinator of Data Assessment & Accountability

10:08:02   From Jennifer Tindle : Jennifer Tindle, Franklin City Public Schools - Coordinator of Special Projects and HR Specialist

10:08:14   From weirr : Can't hear Nicholas

10:08:23   From Pam Stewart, Loudoun County Public Schools : Nicholas, I can't hear you very well.

10:08:50   From Melissa Sexton : Melissa Sexton, Coordinator of Records Management/FOIA Officer for Bedford County Public Schools.

10:10:15   From Darlene Gorman : Darlene Gorman, Chesapeake Public Schools, Records Management Specialist

10:12:07   From Jessica Hawks : Sorry if I missed it.   Hello! Jessica Hawks, Records Mgmt Clerk, Danville

10:19:24   From Pam Stewart, Loudoun County Public Schools : can't hear

10:19:27   From Lisa Martin : Can't hear

10:19:43   From Tracey Beaver : now is better

10:19:44   From Pam Stewart, Loudoun County Public Schools : very low

10:19:48   From Pam Stewart, Loudoun County Public Schools : yes

10:19:48   From Lisa Martin : yes

10:19:49   From Cynthia Hurley : yes

10:24:43   From Wayne Lyle : Will we receive a copy of the slide deck?

10:30:28   From Dr. Zayatz to Nicholas Minor(direct message) : I have to run to an intake for a student - sorry to run! Will the recording be mailed out? This is great!

10:39:42   From Sherry Pettis : Can you please repeat the name of the software or company you are using

10:41:03   From Sherry Pettis : thank you

11:14:32   From Pam Stewart, Loudoun County Public Schools : are the trainings accessible by outside UVA

11:30:17   From Melissa Sexton : Is there an already made training that could be changed slightly for different divisions/agencies for use with our own staff?

11:31:53   From Melissa Sexton : From anyone, sorry my microphone isn't working

11:32:02   From Melissa Sexton : just records management trainings

11:32:56   From Melissa Sexton : Thank you Teshawna

11:33:55   From Patty Massengill : Teshawna, that would be great!

11:33:59   From Pam Stewart, Loudoun County Public Schools : Yes, please share that, Teshawna!

11:34:00   From Susan Gardner : That's great! yes, please let us know on ed-sig

11:34:04   From Jessie Graham : And we're happy to keep talking or share resources! records@virginia.edu

11:34:10   From Cindy : That would be awesome

11:34:21   From Susan Gardner : Great presentation- as always

11:34:46   From Pam Stewart, Loudoun County Public Schools : Thanks for a wonderful presentation!

11:34:49   From Patty Massengill : Thank you so much! Very informative!

11:34:51   From Cindy : Very informative!

12:01:50   From Cynthia Hurley : Yes

12:01:51   From Melissa Sexton : Yes

12:12:16   From Pam Stewart, Loudoun County Public Schools : T, do you have a date you would like feedback by?

12:13:47   From Pam Stewart, Loudoun County Public Schools : Remind me, what retention was being discussed for Raw Data? 3 years?

12:14:20   From Pam Stewart, Loudoun County Public Schools : thanks

12:14:46   From Eric Benoit : Eric Benoit; ebenoit@scview.com ; VA Accounts Manager for SC Strategic Solutions

12:17:59   From Pam Stewart, Loudoun County Public Schools : no

12:18:14   From Lois Ritger : Can't hear

12:18:29   From Michelle Brittigan : yes

12:19:39   From Lois Ritger : still having difficulty hearing

12:20:40   From Tammy Norman : No sound

12:23:59   From Pam Stewart, Loudoun County Public Schools : yes

12:24:01   From Jen : yes

12:29:50   From Melissa Sexton : Does the system tell you the amount of what you are deleting like MB for filling out destruction forms for the Library of VA.

12:31:11   From Meade Harris : Once deleted, are the documents recoverable?

12:41:15   From Susan Gardner : Do you have a method where other school divisions and/or govt entities can request for free?

12:46:26   From Melissa Sexton : Does anyone use this system for active student record files not just archived former students?

12:49:01   From Michelle Brittigan : thank you

12:51:09   From Carolyne Karawa : Thank you

ADDENDUM 2.

Closed Caption recording from meeting.

10:04:12 Okay, the recording has started. I'm just going to, we'll do the in-person people here at the library first.

10:04:18 And then I'll call your name as I see you on the screen and you can unmute yourself.

10:04:24 And introduce yourself to the group. So I'll start out. My name is Nicholas Miner. I'm with Prince William County Schools.

10:04:32 And I serve in the role of records management quality assurance specialist there.

10:04:43 Meet Harris, Albemarle County Public Schools.

10:05:01 Good morning. This is Tishana Thread. I am the Library of Virginia's Records Management Analyst for public schools.

10:05:09 Good morning. This is Anita Venucci. I'm the Senior Records Analyst at the University of Virginia.

10:05:15 Hi, I'm Jessie Graham. I am the electronic records manager at the University of Virginia.

10:05:21 Hi, good morning. I'm Holly Cobb and I'm with Hampton City Schools.

10:05:26 And I'm the record specialist. I'm Crystal Jones. I'm with Hampton City Schools and I'm the records clerk.

10:05:42 And I'm Eric Benoit. I'm a sales rep for Virginia with Strategic Solutions.

10:05:53 And on the Zoom call, we're going to start with Wayne Lyle.

10:05:57 Good morning, everyone. Wayne Lyle, Superintendent, Prince George County Public Schools.

10:06:07 Mary Lee Meeks.

10:06:10 Hi, Marilee Weeks, Stafford County Public Schools Assistant Director of Student Information Systems and Records Officer.

10:06:18 Susan Gardner.

10:06:21 Good morning. I'm Susan Gardner. I'm with Williamsburg James City County Public Schools, and I'm the coordinator of records management

10:06:32 Lois Ritker.

10:06:47 Lisa Martin.

10:06:49 I am Lisa Martin with Virginia Beach City Public Schools in the Department of Internal Audit.

10:06:56 Ray Henderson.

10:06:58 I am Ray Henderson from Campbell County Schools.

10:07:07 Aaron?

10:07:17 Laura.

10:07:22 Hey, I'm Laura Beth Mountsey and I am at Virginia Beach City Public Schools and I am the Intergovernmental Affairs Specialist.

10:07:31 Cynthia Hurley.

10:07:36 I'm cynthia Hurley with Tesla County Public Schools. I'm the director of grants and Records Management and the FOIA officer.

10:07:47 Anywhere.

10:07:57 The hawk.

10:08:14 Nivia Wokovic.

10:08:18 Maybe I walk a bit. And micromanagement and compliance issues.

10:08:29 At a massingale.

10:08:33 Hi, I'm Hattie Massengill. I'm the coordinator of accessibility with Inlet County Public Schools.

10:08:39 I work with state reporting, our SIS, records, now a records management is falling under our department and a little bit of everything.

10:08:54 Michelle Britt again?

10:08:57 Analyst with Albemarle County Schools.

10:09:02 Carolyn.

10:09:12 Hi, I am Caroline Carawa, the record officer for Fairfax County Public Schools.

10:09:20 Cindy?

10:09:23 Good morning. I'm Cindy Pickwhirl with Roanoke County Public Schools. I'm an administrative analyst in the School Counseling and Student Records Office.

10:09:30 And I'm also the records officer.

10:09:36 Sherry Pettis.

10:09:46 Jen?

10:09:52 Good morning. My name is Jen Test. I'm the records manager and FOIA officer for the York County School Division.

10:10:01 Melissa Sexton.

10:10:12 Katina Kenner? Gaynor.

10:10:16 Good morning, I'm Katina Keener. I'm Associate Director of Student Services for Gloucester County Public Schools.

10:10:32 Tracy Beaver.

10:10:37 Hi, I'm Tracy Beaver. I'm the supervisor of records and FERPA compliance and the records officer at Prince William County Public Schools.

10:10:47 Pam Stewart?

10:10:51 Hi, I'm Pam Stewart. I'm the record supervisor at Loudoun County Public Schools.

10:10:59 Tammy Norman.

10:11:05 She's on a call real quick.

10:11:09 Thank you. Jennifer Tyndall.

10:11:14 Hi, I'm Jennifer Tyndall with Franklin City Public Schools. I am the coordinator of special projects and HR specialist.

10:11:28 Okay. Becky Moore?

10:11:33 Yes, hi. I am the record specialist for Fauquier County Public Schools.

10:11:44 And Dr. Z.

10:11:51 Good morning. And I am supervisor of all things, I'm kidding of student data reporting attendance management and manassas City. And my esteemed colleague, Cheryl Tibbs is our records person and data analyst, but she is on vacation because she deserves it.

10:12:08 Is there anybody that I missed or you weren't able to unmute and introduce yourself?

10:12:15 Hello, it's Jessica Hawks, Records Management Clerk from Danville.

10:12:22 Hi. You go.

10:12:21 Hello. I'm sorry. This is Lois Ritger from the City of Virginia Beach. We help oversee the records for all of the city.

10:12:33 We work closely with Laura Beth Mathson in the city schools.

10:12:38 Hi, I'm Renee Weir. I'm the office manager with Clark County Public Schools, also the records manager, FOIA officer, clerk, and director of food service.

10:12:52 Thank you all. I think that's everybody. If we missed you or you didn't have a Mike available, just please make sure you put your information in the chat so we can document it for the attendees for the meeting.

10:13:07 That would be very helpful. Thank you.

10:13:14 So we're going to move on to move on. Approval of the October and January meeting minutes Those were shared out through email and they are available on the PSRC webpage.

10:13:28 We had a little snafu. The last meeting, we approved October before it was sent out to the whole group.

10:13:36 I misunderstood and thought it was shared with the whole group and it was only shared with the leadership team.

10:13:42 So we need to, again, take another vote for approving the October minutes and the January meeting minutes.

10:13:51 So I will obtain… will ask for a motion to approve.

10:13:57 We'll do them separately just because in case there's any objection. Let's do… If anybody would like to make a motion for approval of the October minutes.

10:14:14 This is Tracy Beaver. I'll make a motion for the October minutes.

10:14:18 Okay. We've got a motion from Tracy Beaver from Prince William County to um Approve the October minutes. Do we have a second?

10:14:31 There's a second in the room from Meade and Holly Cobb.

10:14:35 Meet Harris and Holly Cubb so Is there any… discussion or any objection to the approval of the October minutes?

10:14:48 Hearing none, the October minutes are approved. Then I would like to entertain a motion to approve the minutes from the January meeting.

10:15:21 A motion to January meeting be approved. Thank you, Mead. Do I have a second?

10:15:29 Okay, so we have the motion from Meet Harris, the second from Holly Cobb.

10:15:35 Any discussion or objection to the approval of the January meeting minutes.

10:15:43 Hearing none, they have been approved.

10:15:48 I just wanted to take this time out to talk about and prepare for the BSRC meetings for next school year.

10:16:00 Add... I do want to indicate That as when I signed on as chair, I said I'd only do it for about a year.

10:16:08 So at this point, I've been doing it for about a year and a half.

10:16:13 So most of the leadership team has decided to step down at the end of this year.

10:16:19 We are looking for volunteers. We sent out a heartfelt email to ask for some help and we've only received one uh person that has responded and has offered to chair for next year.

10:16:34 I think it's unfair for one person to be able even ask them to do it by themselves because it's a lot for one person to do. One person can't cheer and take minutes and all of that.

10:16:48 So I ask that you really consider think about it and consider volunteering for next year.

10:16:56 This year we had a leadership team of Three.

10:17:02 Which we had one chair, one person that helped with planning and another person that took the meeting minutes.

10:17:11 And keep in mind, it's not a long-term commitment. If you're signing on and volunteering, you're only We ask that you agree to a year, which is either four or five meetings. But we do need the support of our members to keep the meeting going because they don't plan themselves. They don't happen on their own.

10:17:36 So please consider that and just reach out. And I'll come back to you all at our last meeting.

10:17:43 Because we typically set those dates and plan out for the next year before we leave.

10:17:47 Before the end of the school year. So just consider that.

10:17:52 And I'll give you all an update when we come back and April of where we're at with getting new leadership in place and being able to continue the the meeting. The meetings.

10:18:05 On that, is there any… on that topic, anybody like to say anything or discuss? You don't have to volunteer right now. You can just reach out later.

10:18:26 So we're ready to move on. To our first presentation.

10:18:33 From we have the lustrous team from the records management team from the University of Virginia.

10:18:40 They are well known in the field as being one of the top college and universities.

10:18:47 In their records management abilities.

10:18:53 Let's give us a minute just so we can get the presentation set up and Our mics and everything switched around.

10:19:17 So while Jesse gets us set up, everyone, someone on the call in chat, just confirm you can hear us okay, you can

10:19:40 Can you hear anything that I'm saying now?

10:19:47 Is this any better? Okay.

10:19:53 All right. Well, before we get started, I'd like to just introduce ourselves. My name is Jessie Graham. I'm part of the records and information management department at UVA, and I'm here with my colleague, Anita Vinci.

10:20:06 I'll let her introduce herself. Hi, everyone. I'm the Senior Records Analyst at UVA. And I'll just say, if you've been around long enough, you know Jesse and I.

10:20:16 We both once worked here at LVA. Were formally in T's role. I worked with the public schools. Jesse, I think you worked with the public schools.

10:20:24 So I'm going to give Nicholas a plug and say PSRC was a big thing when I was here, this was how we updated the general schedule. I

could not have done my job without this group and I know T probably feels exactly the same way. So this is a really awesome group you all have. It's definitely worth volunteering and being involved with.

10:20:47 All right. Excuse me. Well, with that, we will get started. So the title of our our presentation today is developing a records management program and We don't want this to be terribly formal, but if you have questions, throw them into the chat and we'll try to ask them. Maybe Nicholas can monitor and raise a hand or something if questions come up and we can answer as we go along.

10:21:07 We've got it divided into...

10:21:12 Into two parts. I'm going to take the first part, Anita's going to take the second part. So there'll be a little bit of a transition in the middle.

10:21:22 But basically today we just want to talk about what it takes to get a program off the ground, to revive a program, to refresh an existing program.

10:21:31 Whatever it might be. So we'll start with a little bit of talk about framework generally, communication and services, and then our efforts in terms of training and what we're looking toward in the future here at UVA.

10:21:46 Caroline Walters is the big piece of this puzzle and she is not here. She's actually on vacation. She is, I think, in England today.

10:21:54 We are doing this without her, but it's important to acknowledge that most of the credit for the existence of this program does go to Caroline.

10:22:05 So just a little bit of an intro to talk about the program framework and just generally, you know, it's something that's not a one and done. You don't just start a program and let it run itself. You have to keep improving. You have to keep working. You have to

10:22:23 Re-energize from time to time. And we've done quite a bit of that at UVA over the years. I've been there for 10 years, Anita, for I guess, five.

10:22:31 More than five. So we've done a lot of different things in that timeframe because sometimes it gets stale.

10:22:39 We also want to say and acknowledge that UVA does have sort of an abnormal level of resources for records and information management.

10:22:46 And we recognize that not everyone is as lucky to have that. And a lot of these things can be done without a lot of expense and without a huge staff. So it's scalable.

10:22:57 And that's important to understand. So the.

10:23:03 Where to start really depends on where you are. What we would recommend that you don't do is jump head first into something without doing a little bit of recon about the current state of your organization You know, even if you're not new to the organization if

10:23:23 A focus on records management is new, it's really important to to understand how things are working, to take a step back and look at all the moving parts of an organization and how they affect each other.

10:23:36 This is especially noticeable in things like finance. Have something that starts in one department, it may get a signature here and then go to another department and get a signature there and go to another department. So you need to know all of those steps and understand

10:23:51 How records move through your organization. So that's a really important thing to take a look at if you're new or maybe this is the first stab at records management that you've you've had and you're unfamiliar with that territory The second piece on this slide is really about getting to know your organization.

10:24:10 And it's culture. It's one of those things that's a little bit tricky. It's a soft skill to take a step back again and look at what drives people, what motivates people.

10:24:23 And typically an organization is going to have sort of a universal way of doing things.

10:24:30 I'll put UVA on the spotlight there and say UVA is not a place where we strictly tell people what to do and they do it.

10:24:37 Doesn't work like that. It's very much everybody kind of gets to do their own thing. We're all kind of special in our own way. So that's something we have to contend with and something we know exists.

10:24:49 It's important to understand whether your organization is nimble or are they resistant to change.

10:24:55 Are they opposed to what we've heard in the past to unfunded mandates?

10:25:01 Do you have employees who are protective of their information? Don't think the rules apply to them. And I won't say who believes that at UVA.

10:25:11 The next thing, once you've kind of got a handle on your culture and how people react to rules and guidance and that sort of thing would be to figure out what problems you need to solve.

10:25:23 The first thing that's really important is to not jump in and assume or perceive problems exist because they may not. So if you're new to RIM, maybe you're fresh out of school and you're like.

10:25:34 This is definitely what we need to do. Maybe electronic records, you hear about it all the time. We need to focus on that. But what if your institution or organization is still struggling with paper? It doesn't make sense to

10:25:48 Jump on the bandwagon of the next new thing if your group is not there yet or has a different problem.

10:25:56 Do you have an entire department that maybe is resistant to RIM?

10:26:01 I hate to point to IT, but sometimes There's a conflict there.

10:26:07 Do you have allies or maybe unfortunately enemies in leadership somewhere that you need to identify?

10:26:14 Certainly identify the allies. Don't focus too much on the enemies.

10:26:18 Focus on where those pain points are What are the problems? What are people struggling with? And a lot of times folks just want you to ask the question.

10:26:27 If you go in assuming you know what's best, that may not go over well.

10:26:32 Asking and asking sort of making a list of things that are pain points and barriers is a good place to start.

10:26:39 And the final point here. Compliance needs.

10:26:43 Public school folks, you guys know there's tons of stuff that you have to keep track of, that you have to follow.

10:26:51 Making sure you know what those are, making sure you know where they might conflict with each other, unfortunately, and having a plan for how to deal with those conflicts is important.

10:27:02 So really taking a look at these four things is an important first stab at getting your program on its feet or back on its feet.

10:27:13 Or refreshed. Okay, so at UVA, so just as a little bit of background.

10:27:21 Caroline Walters was hired in 2008 and that was as a result of what we called a process simplification report.

10:27:30 So at UVA, we have an entire group that's dedicated to lean management, figuring out where you know.

10:27:39 Where gaps are, where processes don't work. And back before 2008, They spent many months reviewing the university's records management structure.

10:27:50 And... the position that Caroline now holds of university records officer actually came out of that report.

10:27:57 Unfortunately, she wasn't given the report when she was interviewing. She knew it existed but didn't know what was in it until she actually took the job.

10:28:04 Which was probably on purpose but on purpose It did provide her with a really well outlined place to start. So she had a playbook really of things that she needed to tackle. So she was ahead of the game at that point.

10:28:22 However. It meant that they were expecting quite a bit of action.

10:28:27 Right away because we did have this plan in place. So the report laid out the main areas that needed addressing in the new records and information management structure. And I should say the first big piece of that was moving

10:28:40 Records out of the library reporting structure and into IT. Now, that all being said, we have since moved out of IT and into compliance, audit and compliance. So we're no longer in IT.

10:28:53 But having been in IT was actually a boon for us because we now have a lot of contacts there and have a good working relationship with many of the IT groups.

10:29:04 But going back to the report. Really laid out what people were looking for, what they were missing in the previous structure. And that was really just really a lot about services, consultation services, having a central communications hub for where do people go for answers, basically.

10:29:27 The second piece that was really big was a storage solution for paper because UVA does not have a centralized record storage warehouse or anything like that so people were drowning in paper at that time.

10:29:39 And the third big thing was training. That was… basically nonexistent at that point One other small piece, in fact, we're talking about 2008, of course, that electronic records retention was briefly

mentioned, but was not a main piece of that puzzle. The focus was really on

10:30:03 The consultation, communication, storage, and training aspects. And if you're interested in reading a report, it is available on our website in the About section. And I think we'll have our website on one of these last slides.

10:30:17 Coming up. So just some tips for seeking support and continuing to develop your program, because I know we're all at different stages of maturity and growth and You know, things wax and wane over time. But some tips to just

10:30:37 To refresh would be making sure you have like a really short elevator speech about what you do.

10:30:43 A lot of times people's interest in records management might be fleeting, but if you catch them and they're interested in that moment, have a 20 second thing that you say about why RIM is important. And it sounds silly, but you'd be surprised the small talk that happens and someone asks and you think to yourself, well, there's a million things I could tell you right now about records and information management. Of course, they don't want to hear that.

10:31:04 They want the short and sweet version. So think about that.

10:31:08 And have something kind of a canned thing that you say.

10:31:11 It might also come in handy if you're ever invited to a meeting and someone puts you on the spot and you've got something kind of pre-made.

10:31:20 The other thing that you can do is ask for a seat at the table for those discussions about new systems or just anything that you feel like RIM has a has a piece to provide.

10:31:36 And some examples of that would be, you know, if there are leadership meetings or I know at UVA we have all kinds of groups. We've got a faculty senate, a staff senate.

10:31:47 We have business administrators and research administrators. So if there's any groups like that out there that you could ask to sit in at.

10:31:56 You'd be surprised if you ask for five minutes. If you ask for 30 seconds to say, hey, this is my website.

10:32:01 Hey, this is how you ask questions about records management. You're putting yourself out there. And I will say.

10:32:09 That the leadership thing, getting a seat at the table in the leadership meeting is not easy.

10:32:14 Especially at a place like UVA. And it took Caroline 14 years to get like three minutes in front of the Board of Visitors.

10:32:23 So it's worth to keep trying to do it. I know she attempted it many, many, many times.

10:32:29 Eventually, they said, sure, come talk to us. And they were interested. So you need to, you know.

10:32:34 Be relentless, I guess, in your pursuit of a seat at that table.

10:32:39 If at all possible. A couple of things here at the end of this slide, creating an advisory council.

10:32:46 This is something that Caroline is really interested in doing and She imagines it as sort of a steering group for records issues. They would, I would assume, sort of be like what psrc is In terms of looking at schedules, looking at training.

10:33:05 Guidance for best practices and just as a group that would help guide our department in its decision making.

10:33:16 Hasn't happened yet. It's on her list. I think this is one of the things that she would really like to see happen.

10:33:23 In the future, the second or the last bullet, I should say, development of a records coordinator program is something that hasn't really gotten traction at UVA but that is a scale issue. We have more

than 300 departments and we are fairly decentralized. We've got units all over the state.

10:33:41 So it would probably work better in a smaller organization or a more localized organization.

10:33:47 It would be difficult for the three of us to manage a 300 member liaison team.

10:33:54 So we've opted not to go that route. It also didn't get any traction when it was brought up in the past.

10:34:01 As sort of an unfunded mandate to then put this position in people's job titles or not, but expect them to do the work.

10:34:09 It didn't get traction at UVA, but it certainly, I know it has at other and other organizations to have those liaisons embedded in the departments.

10:34:19 To assist and to assist transfer knowledge there.

10:34:24 Let's see. So, you know, taking action, this is the piece where you've got to take all the things you've learned about your organization into account, including how much money you have to spend, if any, how much manpower you have.

10:34:41 But some easy wins there would be to improve your communication.

10:34:45 Whether that's through training and tip sheets, a website, a helpline, a centralized mailbox. At UVA, we have something called records at virginia.edu, which we all have access to, but everything goes into a centralized place. Nothing gets lost in our individual mailboxes.

10:35:04 Offering services if you're able to. And this will be something Anita goes into here in a little bit.

10:35:10 Whether that's consultative or if it's actual storage solutions or something else.

10:35:18 If getting support is where you're at in your position. Working your way into your upper management meetings, leadership meetings.

10:35:26 Even if it's a department meeting. Do it. If you have some special issues, and UVA did when Caroline first came on.

10:35:36 Obviously, UVA is a research institution. We have lots of clinical trial records. And when she started, there was no cohesive way that they were being managed. We have, you know.

10:35:47 100 departments that are doing clinical trials and nobody's talking to each other.

10:35:51 Fda is coming in, the US government's coming in, the sponsors want to see stuff, and nobody knows where anything is.

10:35:58 That helped her form a mission early on that that was something that we needed to focus on.

10:36:04 If you've identified some issues there, maybe you jump headfirst into one of those.

10:36:10 But something to think about too is that Some of these things and these issues might be discovered on the fly, so you've got to be flexible. That's a key to any of this is being flexible, being agile.

10:36:20 And figuring out what your best first or next step is.

10:36:25 But it's also important to note that it may take some time to discover the real needs of your organization and they're likely or might be different than your initial thoughts.

10:36:35 About it. So be prepared to shift again with the agility And getting support really does equal progress, even if it's not something tangible, there's nothing on paper, but the more support you garner, and even if it's not at the highest levels.

10:36:52 Of leadership, it's really important because small wins will win over people will win over people Lots of small wins is increased visibility.

10:37:03 Taking those small steps, baby steps. Maybe you can't get a full-fledged policy put into place, but you can put out guidance and you can make sure people see it.

10:37:11 Those are important. And the one thing that UVA, it's always been kind of our our mantra there is that we focus on the people who want the help first.

10:37:22 So we don't focus on a lot of aggressive outreach, telling people what to do.

10:37:27 We're still taking people coming to us. All the time and all the time I don't think that that has waned much. I don't know if Anita disagrees. It hasn't stopped. So we've not had that moment where we said, wow, they've stopped knocking on our door. We better go and find them. It hasn't happened.

10:37:42 We focus on that first. It's always easier to help people who want help.

10:37:51 Two places where we've had some solid wins at UVA, we've really centralized our communication strategy.

10:37:59 We have a website. It has lots of information on it.

10:38:02 We are fortunate enough that our IT uses Drupal, which is pretty easy to set up and run.

10:38:10 I know that not all organizations have that same flexibility, but if you are in a position that you think you can ask IT for a website or even an intranet website or a place to put things.

10:38:23 Maybe it's a Microsoft Teams that you invite everyone to. It just depends on your organization's structure.

10:38:30 A place where all your stuff lives is really important. People sometimes are hesitant to ask or they don't know who to ask, but if they know where to go and they can find it themselves.

10:38:40 They're more likely to do that. Like I said earlier, we have a central mailbox with an identifiable name.

10:38:47 And it doesn't go to one person. So there's some continuity there if somebody's out.

10:38:53 It's also identifiable by name. So maybe they don't know my name, but they know records so That's something that has been a big win for us. It also keeps our email boxes a lot cleaner.

10:39:05 Something else that we've done is set up a list serve It's what they call a simple list, which I think it's records dash management.

10:39:12 Is the name of it. We add people to that as they ask.

10:39:18 People who use our services, we promote it at trainings and things like that. And I don't even know how many members. We've probably got a few hundred on that.

10:39:26 Now. And like I said, those are the people who want the help. So we give them the news. We give them the updates through that listserv.

10:39:33 And the last point on this one is a sticking point for us because at UVA, there is a tendency to not allow mass emailings.

10:39:44 They don't like them. And Caroline has asked several times in the past to have a mass email about records management just once in a while, you know.

10:39:54 And in the 15, 16 years, we have never been able to do it.

10:40:00 We aren't getting traction on that either. So we have focused more on what we can do outwardly instead of focusing on a mass email that, you know, in fairness may be very likely deleted by most people anyway.

10:40:17 Yeah.

10:40:23 For the website, maybe? The listserv. Oh, that is something called simplest. It's really just you can set it up through outlook or this is just something, a service our ITS uses, but there's many ways to set up a listserv. I know the library has some too.

10:40:44 Oh, Drupal is the website. I don't know if it's a software technically, but it's a web design tool that is pretty user-friendly, and that's how our website is behind the scenes. It's run through Drupal.

10:40:57 Hopefully that was what you asked or wanted the answer to. If not.

10:41:03 Let me know. Okay, so the second big win here, my last slide here.

10:41:08 And we've talked about this before, if any of you have been at Vigara or other local conference type things.

10:41:15 That uva UVA We use the LVA schedules as templates. And I know T is on board with this. It has been vetted. We were very hesitant to just throw the schedules wholesale at people when they ask, how long do I have to keep such and such?

10:41:32 Instead of just pointing them to the LVA schedule, what we have done is taken those series that are most frequently used.

10:41:42 And re... reworded them to use local UVA recognizable language.

10:41:48 Obviously, using the LVA schedules as templates, we're not not changing the number, we're not changing the retention timeframe or anything like that. We're just using familiar language. And we respect the fact that the LVA schedules are purposely written to be a little bit ambiguous so that they're so widely applicable. But sometimes that means that people don't understand what they're getting at. And that's our job as we see it.

10:42:14 To make sure that we tailor those so that folks understand them locally.

10:42:19 So like I said, we're going to use the familiar language. We also limit which series are available. So our database does not have all of the series. It has the ones that we know are used most frequently.

10:42:29 Obviously, that's going to be stuff on the college and university schedule in addition to 101, 102.

10:42:34 But again, it's not all of them. It's a good thing and a bad thing. We don't want to just link to something and let them figure it out. We

want to make it kind of a narrow focus It helps them feel less overwhelmed too when we say, you know, search a familiar

10:42:54 Local title for something in the record series name field and they'll find it.

10:42:57 If they were to search that in the LVA database, they likely wouldn't find it. So it's to help.

10:43:04 To help kind of with that overwhelmed feeling, because sometimes those schedules can be a little overwhelming When somebody comes to us and says.

10:43:13 Well, I have this and I don't find it. I don't see it.

10:43:16 That's a clue to us that we need to add it, and we do.

10:43:19 So that happens with some regularity, but not very frequently now that we have so many in the database.

10:43:25 And I should mention too that we are using GIML. As our retention tracking, location tracking software. It's called gimbal Physical.

10:43:37 Formerly called Inflinks. We refer to it as a university records management application. It holds all of our series information and it through a connection that our IT group put together informs this database. So people can log into Irma and do what they need to do for their boxes in IRMA. But if they're just looking for series information, they go to this records retention schedule database on our website.

10:44:02 Which is pulling information. From what's in IRMA.

10:44:08 If your institution doesn't have the budget for something like a gimmel physical.

10:44:13 Even a spreadsheet is helpful or a searchable PDF or something that people can look at themselves, but that is condensed to what they need to know.

10:44:23 All right. And I am going to pass this off to Anita. So just hold tight while we rearrange. And what a great segue because I'll mention I

manage the website And so Jesse may not be aware, our feed to Irma broke.

10:44:40 So I am now manually updating that schedule database with a spreadsheet that I import to the website. So you truly don't need an info links type system. It is just a spreadsheet that I upload to the website that pulls the feed.

10:44:55 So kind of along those lines, I want to talk more about some of the act like Jesse talked about kind of our philosophy, how we make decisions, what we prioritize.

10:45:05 I want to talk a little bit more about the services and training that we offer.

10:45:10 And how we kind of decide what initiatives are worth our time or limited time and energy and our budget because it is not endless.

10:45:20 So we focus a lot of energy on one-on-one consultations with offices and departments, and that can be in person or that can be virtual.

10:45:28 Both have benefits and disadvantages, right? So in person, you get FaceTime with people you know, you're not just... an email address or a voice on the phone It's really funny. I came to UVA in 2019 and I was on grounds for six months and then we all went home for two weeks.

10:45:47 While COVID obviously passed and then we were all going to go back to life, right? Well, no.

10:45:52 So I had six months on grounds and my job has been hybrid remote since. So Jesse knows way more people than I do. I mean, we were just at an in-person meeting yesterday and I didn't recognize any of these people. And then I hear a name and oh, hey, I know that person.

10:46:10 It's harder to build connections with people virtually. So we do do in-person consultations. We will go to someone's office. We would do staff meetings.

10:46:21 We've just had to make some decisions around when is it worth it. So if someone wants us to present at a staff meeting of five people You got 25 people? Great, I can be there. But I don't know if you've tried parking on a college campus lately. There is nothing central about our central grounds parking.

10:46:42 So to drive from our office to the parking deck to park to walk 15, 20 minutes to someone's office.

10:46:51 To get to someone's office and realize, hey, this could have been an email or this could have been a phone call. And now do that in reverse.

10:46:58 We've just had to make some decisions around when is it worth my time for me to get there, get in person, talk to you face to face versus what can we do virtually? And so we've addressed this by kind of setting up a process where we will triage

10:47:14 Requests. So if someone sends an email and says, hey, can you come to my office? I've got all this stuff and I don't know what to do with it.

10:47:20 Our response is usually, let's set up a 20 minute phone call, talk through what you have with me.

10:47:26 And if in that 20 minute phone call the answer turns out to be you've got receipts and invoices from 1995, I'm not coming to your office to tell you to shred that.

10:47:36 This works with things like Zoom too, right? We've had times where we'll get on a Zoom, everyone's got their camera on and somebody's walking us around their office and showing us.

10:47:46 Okay, great. I also want to know before I get there is your Is your situation well managed, well organized, or are you showing me a room with a bunch of boxes collapsing on each other? So I'm not walking in blind to…

10:47:59 To this consultation where I'm not going to be as useful as I could be because I don't really know what I'm getting into.

10:48:06 So it's, you know. The in-person, the face-to-face, it's good. It builds relationships in a way that the phone calls and the Zoom meetings haven't been able to because we only have so much time and because UVA is a large

10:48:25 Spread out. It's just not realistic to always go and do in-person consultations. So we really have to decide where is our time worth it, where is it not?

10:48:39 I think Jesse mentioned we do not have a record center. We do still have a lot of paper.

10:48:45 And people are still surprisingly producing paper. So we use an offsite storage vendor in Southwest Virginia.

10:48:54 And they come to grounds, they do pickups, they do delivery.

10:48:58 They're really excellent, but we do require for anyone that uses that, they must use our tracking system. So Jesse mentioned it. It's Gimelphysical. We call it the University Records Management Application, IRMA.

10:49:11 And anyone who wants to send records to offsite storage has to enter them into IRMA so that we can track what have you got? What's the date range?

10:49:19 When is it due for destruction? Because we don't want to just send paper off and then continually pay endlessly for this paper.

10:49:26 We do not pay for storage, the departments do. So it is departmental billing. So they have a stake in it too, right? It's not just eating up our budget. They've got to pay that bill every month.

10:49:38 Incentivizes what do you have, when can we get rid of it?

10:49:43 And we have always required before anyone can use our system, they must do some basic training with us. So it's another way to kind of force people to engage in a larger way. If you want to use our service and you want to send things off site.

10:49:57 You've got to do basic training with us that isn't just about using our system it's about using the retention schedules, doing an RM3, all those other kind of things.

10:50:08 We... also have some physical record storage standards that give people guidance if they don't want to send things off-site.

10:50:17 Where is an acceptable place to keep them on grounds. So an unlocked filing cabinet in the hallway is not an acceptable place to keep student records, right? We've got requirements about anything with we call highly sensitive data, but essentially anything with PII

10:50:35 Has to be behind two locks, for example. So that would need to be in a locked filing cabinet in a locked room.

10:50:41 We are seeing people lose their on-ground space, especially post-COVID. Uva, of course, owns a lot of buildings, but we also rent a lot of buildings around Charlottesville and Facilities management is increasingly trying to unload those properties.

10:50:57 You know, we have a lot of buildings that the university owns that sit empty a good chunk of the week as more people are hybrid or remote.

10:51:05 So in this push to downsize our properties. People are losing those old file rooms that they used to have. And that's been a boon for us because it's really pushed people to us because now all of a sudden.

10:51:17 I don't have a file room anymore. Where do I go with this stuff?

10:51:20 Well, if you want to use our offsite provider, it's the only one on contract for the university. It's the only one that's approved.

10:51:28 You got to work with us. And so that's been a good way for us to connect with people and build those relationships too.

10:51:36 Part of our consultation is we will come to people's office and kind of do that assessment and say, is this an acceptable place to keep your records but Really? I haven't done one of those in years because people just it's

10:51:48 Nobody's got that file room anymore. Nobody's got that space. They're losing that space.

10:51:58 In spite of all that paper, we, of course, have even more electronic stuff than we used to. We are a Microsoft organization. One of the things we've done is we've created labels that can be applied in Outlook, in OneDrive, in Teams.

10:52:14 They do not mimic the retention schedules. So we made the decision that people were not going to scroll through labels and classify their records following, I think we have 264 series in our database right now So our labels are years. We've got 60 days, one year, three year, five years, seven year.

10:52:35 And we train people to pick the label that closes matches closest to the retention series they're trying to meet.

10:52:46 So I can't think of a single retention series that has a six-year But let's say you have something you have to keep for six years. We don't have a label for six years. You got to pick the seven year label.

10:52:58 It does mean we're not perfectly matching the schedules on those things but it was a decision we had to make. How can we get people to use these labels to automate some destruction of their electronic records. And the best way to do that was by making the labels

10:53:14 As simple as possible. We used to do a lot of shared drive cleanup. That was something people were really interested in. And we would do training and we would walk people through how to look through their share drive and assess what was there and reorganize it and delete what was past retention.

10:53:33 And it was very, it was a really heavy lift for the departments. It was something people were interested in. And then it felt like the more we walked them through the actual process.

10:53:43 The less interested they got. So we, a couple of years ago bought a product called Tree Size and tree size scans shared drives and gives you all kinds of reports.

10:53:55 Based on last accessed, last modified. It identifies duplicates. You can find files by size.

10:54:03 So what we work with departments to do now is scan their shared drive.

10:54:08 Give them these reports and help them figure out, okay. Why do you have 100 gigabytes of video files? What the heck is going on there?

10:54:18 Or you've got This PowerPoint presentation saved in 18 different folders.

10:54:24 Look, if we just get rid of your duplicate files alone, you're going to drop 50 gigs off your shared drive.

10:54:32 This idea like electronic storage is so cheap, server space is so cheap.

10:54:37 I mean, our IT charges us. We pay for our server space.

10:54:43 So it is, you know, it was cheap when we were all buying like 300 gigs of server space, we've got something like eight terabytes of server space just for our department now.

10:54:53 So it's not cheap anymore. The other thing.

10:54:58 We really try and stress with and this is true of both paper too If you've got it and we get a FOIA request for it.

10:55:07 Best of luck finding it on your mess of a hard drive.

10:55:10 So tree size has really been good for helping people clean up the electronic things.

10:55:18 Especially as we see more people go towards Teams and SharePoint, they're kind of abandoning their share drives.

10:55:24 And so sometimes we get the call from IT saying, hey, this department wants us to just decommission their 500 gigabyte shared drive. Can I just do that? Can I just dump that? And the answer is.

10:55:36 No, what's on the shared drive? So this has been really interesting because especially with electronic, people kind of have this idea sometimes that, well, IT is managing that.

10:55:46 No, they're not. They're just giving you the server space. They're not managing it in any way.

10:55:53 So tree size has been a way for us to also help people start thinking about, hey, you've got to manage that just like that paper file room that you don't have anymore.

10:56:05 Yes, it's very expensive to have all that stuff. A lot of this is training, right? We have to train people on how to do the labels. We have to train people on how to manage their records, whether they're on site, off-site, electronic.

10:56:21 Our approach to training has changed a lot over the years.

10:56:26 We were really heavily in person come meet us in this room. We've got Panera bringing in those bear claws and coffee.

10:56:34 We used to do an in-person conference at a hotel in Charlottesville with our information security group and our privacy group. It was a full day and multi-track and catered lunch and a keynote speaker.

10:56:46 And then COVID happened. And so we've really segued to virtual training much more.

10:56:54 That started out as join me on this Zoom at 10 a.m. And it has kind of slowly morphed into a more on-demand, pre-recorded access at your own pace kind of training.

10:57:08 Most recently, with a big win we've had where we've got a mandatory training now.

10:57:13 So this all started in person, right? In a hotel room, in a… central meeting room in the building where the bookstore is.

10:57:24 And people liked it, right? It was a fun opportunity to come and connect.

10:57:28 And, you know, you've got snacks and we had always had swag, right? We had like posters, pens, coffee mugs, right? We all love this stuff.

10:57:39 And then we started to see numbers drop. So the conference, the final conference was in 2019. It did not resurrect post post-pandemic. But we had started to see numbers drop on the in-person training even before then.

10:57:54 Because again. It's a large, disparate university with very little parking It gets hard for people to get out of the office, get to a meeting. If I've got a meeting at 10 o'clock and training is at 9, I don't have time to get back to my car, get back to my office, get to that meeting at 10.

10:58:14 So what we were finding was 35 people would sign up.

10:58:19 You roll in with $150 worth of catering and then five people actually show up at the meeting.

10:58:25 And it just, it wasn't it just wasn't the return on investment wasn't there like it had once been.

10:58:32 With the in-person meeting. But when this was the way it was done.

10:58:38 Everybody loved it and it was popular and it was fun.

10:58:41 But we had to make peace with that just wasn't how it how it was working anymore. People wanted things virtual. They wanted flexibility.

10:58:50 So we had started transitioning this way in late 2019, early 2020.

10:58:56 Covid really forced us this way. And when we moved initially to online training, we just wholesale lifted our in-person training and did it online.

10:59:05 Instead of coming to Newcomb Hall and sitting there for an hour while we presented basic records management, you logged on to Zoom and you sat there for an hour while we presented basic records management.

10:59:15 And initially, that got a huge response, especially in 2020 when We first moved home and everyone was kind of trying to figure out how to fill their day or like, how do I do my job now from my dining room table?

10:59:29 People came to training in droves. And then we saw that drop off. So then we segued to doing shorter things where we would do a 30 minute, which would really be like 20 minutes of presentation, 10 minutes of Q&A.

10:59:41 Because that was easier for people to fit into their day.

10:59:45 And we could focus on something like a more directed topic as opposed to something kind of big.

10:59:52 So instead of basic records management, we would just do a session on how do you do an RM3?

10:59:57 You know, like take a chunk of something. And then we went even further.

11:00:01 To getting really tight bites of things like five, six, seven minute things.

11:00:07 We recorded a lot of topics. Started recording things and we put them into Workday, which is our finance, HR, LMS system.

11:00:16 And so people can just log into Workday and take that, you know, all you care about is how long do I need to keep financial records? Great. You can take that five minute managing financial records video whenever you want.

11:00:27 It's there for you all the time. You don't have to wait for me to offer it once a semester.

11:00:32 On a Wednesday and you've got a standing meeting at that time, so you're out of luck. It's never going to work for you.

11:00:38 It's just really, I think, been a lesson for us in what works doesn't always work. You've got to be willing to see what your audience is and move with them.

11:00:50 And I mean, 2020 was huge for us. Our virtual training was just attendance was astronomical because I mean, we were getting 70, 80 people at every one of our training sessions. It was unreal.

11:01:03 And then it just dropped. So we are still seeing good numbers when when we were doing virtual training. People were still signing up.

11:01:13 But we were starting to see the same thing that happened in person.

11:01:19 Where 30, 40 people would sign up, we'd get on the Zoom and six people would be there.

11:01:24 And okay, we haven't spent money on catering and we didn't drive to Newcomb Hall.

11:01:30 But it still started to feel like, you know. If Jesse and I are on the call because one person would always monitor chat, one person would present.

11:01:37 So you've got me and Jesse and two people show up and it starts to feel like, well, this is a little silly.

11:01:45 It just, again, made us start thinking about okay, how do we segue this into something else?

11:01:53 Which was… Oh, I think I Oh, I moved the slide. Never mind.

11:02:00 No, you're good. Which was really good.

11:02:04 Kind of a lesson for us and a um transition to the mandatory training that we've finally gotten.

11:02:12 So training for us isn't just kind of the in-person anymore. It's not just the recorded Zooms. We create a lot of tip sheets.

11:02:21 So people, again, it's things you can access on demand when you want it.

11:02:26 And we tend to get more specific in the tip sheets than we would in training.

11:02:31 So for example, I think Jesse mentioned UVA does a lot of research and research is really complicated, whether it's human subject research or behavioral research? Are there adults? Are there minors? Who are the participants? Is it outside funded? Is it federally funded?

11:02:45 We're not going to do a training on that. It's so complicated, but hey, here's a tip sheet. You want to know how long you need to keep this research for minors that were involved in a experimental drug trial. Here's a very specific resource for you.

11:03:03 The instructional videos are the same way. I will say with the instructional videos, we used to do a lot of these for Microsoft, how to do labels.

11:03:12 How to double delete things from your email. We had to give up on that. Things in Microsoft change.

11:03:19 Constantly with no notice. And I mean, as soon as we would update something, it was out of date again.

11:03:25 So again, we had to kind of abandon. We felt like a big part of what we needed to do was Microsoft training and we've just completely walked away from that. We cannot keep up with them.

11:03:37 Will help people but we just we've got to refer people to Microsoft. It changes too fast for us to maintain it.

11:03:44 And then we get a lot of requests these days to come to staff meetings and present.

11:03:50 So not training per se, but just, hey, can you come talk to us about what to do with this?

11:03:55 And we take those the same way we take consultations. How many people are in your staff meeting?

11:04:00 This is three? No. This is 20. Great. We'll be there in person versus virtual.

11:04:06 And just being flexible with that. The last thing I'll mention, we do finally have Just today, we rolled out our first ever mandatory

requirement that everyone in the academic division has to take records management training.

11:04:25 So it is a 10 minute video that we produced with a product called Articulate Rise is the software. I think it was about eleven hundred dollars for a license for the year.

11:04:37 It's really nice. We made the decision. What we've been doing with our training that we made on demand we would just record a PowerPoint. We would play through a PowerPoint and we would narrate over it. And that's what we were doing.

11:04:49 But for something that was required for everybody, we wanted something that looked a little more polished. So we bought this software.

11:04:55 It is very plug and play user friendly. It was really nice.

11:04:59 And so the email went out late yesterday from our COO's office letting everyone know You are required under policy IRM 017 to take records management training It took 12 years.

11:05:14 To get this addition to the policy. So I think the lesson here is we get told no all the time.

11:05:21 And we just keep asking. And it was a lesson in like building goodwill.

11:05:29 And maybe wearing people down a little bit, but mainly building goodwill.

11:05:33 However, in peak, there is never just a pure win I will tell you that since this email went out yesterday.

11:05:42 I have just endlessly fielded emails from people saying, I don't have to take this.

11:05:47 I don't create records. Why do I have to do this?

11:05:51 It's a 10 minute training and it would take you less time to do this training than to email me and be mad about it.

11:05:59 But, you know. For the vast majority of people who got that email, they had never heard of us. They had never heard of this policy, and they clearly had never heard of records until they got this email telling them, you have records and you are required to manage them.

11:06:17 So it's a win, but it also, you know, it's like every step forward creates more work, which is job security. So we'll take it but I mean, I guess… That is my takeaway from this, right?

11:06:34 There's no stopping point. There's always somebody else that has no idea, has never heard of us, doesn't think this applies to them.

11:06:42 Doesn't understand why any of it matters. It's a constant education.

11:06:47 And once every single person at the university has, in theory, taken this training.

11:06:51 Half of them will get a new job and will start over with new people.

11:06:57 On that hopeful note.

11:07:03 All right. The future here, I mean, for us, it's a lot of the same things that we've been doing.

11:07:10 The consults the consults keeping Irma, the schedules up to date and working with the Library of virginia to make sure that all the needs are being accounted for. It's all the same, but as hopefully you've noticed we've had to be agile and flexible this whole time and realize when we're doing something that isn't necessarily working the way it used to work.

11:07:32 And… understanding that it's important to to see that for what it is. And it's not a failure, it's an opportunity so We wanted to talk a little bit about the wins that we've had. And we've touched on several of these already.

11:07:49 But starting in 2010, which is about a year and a half, two years after Caroline started the first iteration of that policy was issued.

So it's been updated, I believe, two to three times, most of the two in the middle were very minor.

11:08:04 Edits to it, but it was a big win for her to get the policy put into place in the first place.

11:08:09 And it also was the year that we established our vendor storage, which was also a big win for us. And we have continued to use the same vendor. It has been a successful relationship for many years now.

11:08:20 2012, we... purchased the Gimel physical, which at that time was called InfoLynx, and we have continued to update that. We went from an on-premises version of it to an I think 2022.

11:08:34 The web version of it. So we have continued to use that product and evolved through there as well. We were early adopters of the Microsoft 365.

11:08:45 Tools. So we deployed in 2018 the labels. So we had had 365, I believe, for a year or so before that.

11:08:54 The labels went out in 2018 and we've seen increased usage. It hasn't been the easiest thing to get people to adopt.

11:09:01 As time has gone by and more people are in it and Believe it or not, there are still groups who are just now getting into teams and you know it They're still coming out of the woodwork. So it has worked. It has been successful.

11:09:15 To some extent there. That same year, we actually were involved in the acquisition of Workday for HR and later for finance. We had a seat at the table there.

11:09:30 As early in the process as we would have hoped. It was a little bit too late. Workday doesn't have great retention built in, at least it didn't then.

11:09:40 Continued to have a seat at the table there as decisions are made.

11:09:45 About how things work in Workday Finance. And HR. 2023, our program just a little bit of of Self-promotion, we won the Negara Award.

11:09:59 Program Excellence Award, I think it's called And that was the same year that was the same year Caroline was finally able to talk to the Board of Visitors. And if you're not a university person.

11:10:08 That's a big deal. Yes, the school board but And then 2025, as Anita said, we launched the mandatory training. So it has been a journey, especially for Caroline. She's been here since the very beginning.

11:10:24 And even in the 10 years that I've been here, it's a completely different program. And I think that speaks to staying in tune with users and keeping up with the latest technology, but also just making sure that you're able to

11:10:39 Self-reflect and look at your program and admit when things don't work. And it was hard to let go of those in-person trainings with the cookies and the brownies, you know, but we finally we had to do it. And it was a great decision all around to do that.

11:10:54 Let's see here. So I guess, and there's Caroline. She did an article way back when, when she first started.

11:11:02 But you can't do everything all at once. Nobody has the staff or the money to do all the things we've talked about all at the same time.

11:11:10 This is an iterative process. You got to pick what's most important to you. What does your group need the most? What do you have the ability to do? I mean, maybe records management isn't your full job, but could you pick one thing?

11:11:23 And focus on that. You know we we had we had some big wins and, you know, putting ourselves out there to get those consults done, those major clean outs done. It provides visibility.

11:11:39 And we've sort of ridden that wave for a while now, but there is turnover. We have new faces. So, I mean, maybe in the next year or

so as the on-demand training kind of drops off with attendance, maybe we circle back, I mean, to doing things more

11:11:55 More live training. Who knows? It'll just be something we have to think about.

11:11:59 So Caroline did do a podcast recording. It's something that our finance department does with folks around grounds. And that's the link to it. It's about 45 minutes.

11:12:11 It's a way to reach out. So I don't know if your groups or your institutions have something like this. Maybe it's a newsletter, maybe it's a podcast, maybe it's an intranet site that or a blog that has something that gets updated with regularity.

11:12:26 Putting something out there. To get visibility in a different way because you can email people to death and they're still going to delete it every time. But if you do something a little bit different or they see your face

11:12:37 Or your name in a newsletter from finance, it might pique their interest.

11:12:44 But, you know, a lot of this boils down to just recognizing that records and information management is not everybody's full-time job it's it's really not all that interesting to most people. Obviously, it is to us or we wouldn't be here but

11:12:58 Being difficult or taking a hard stance and making it very black and white tends to turn people off. So we've we've sort of had to take a softer approach. And that's what works for UVA and We've seen it come to fruition over the last 15 years or so, or Caroline has at least.

11:13:19 And just being there to help has been the biggest thing to position ourselves as helpers and not the records police.

11:13:26 I think has been the biggest thing that we've focused on because we can get really tied up in the regulations and the rules and this is how we have to do it.

11:13:34 But we would rather people do it the best they can than not do it at all.

11:13:41 On that note, I hope that this has been helpful. And I think we have, Nicholas, do we have time for questions or not?

11:13:49 Okay, and I need to just put up the slide that records at virginia.edu is our mailing, our central mailbox Feel free if you have questions, you can always shoot us an email there. It's fine. It's not just for UVA folks. And our website is

11:14:02 Listed there as well. And can I just add about the website? Everything we've talked about, our training, our tip sheets, it's all on the website.

11:14:12 And please feel free to steal and adjust any of it. We shamelessly take things from other programs when we see things we like and modify and adapt it for ourselves.

11:14:23 We would be delighted if other people did the same for us.

11:14:43 Okay, so we're going to open it up. If anybody has questions, if you can please Raise your hand so we can identify you.

11:14:50 That was a fabulous presentation, and I know I have a few questions, but I'm going to open it up to everybody else.

11:14:57 Before I voice mine. Okay, we have T.

11:15:04 Anita, Jesse, and Caroline, thank you so much for presenting today with PSRC. I want to emphasize how This is a major topic, not just within public schools, but also on the higher education level. So I think that your presentation today just noted that

11:15:21 You're going to have challenges and you're bound to have your successes. One thing I wanted to just ask is.

11:15:28 You emphasize making sure you just focus on your allies. In situations where you have challenges with certain departments, I'm pretty sure and confident that you try to at least reroute back to them again.

11:15:41 What type of advice you want to give to anyone in public schools with the departments that are giving them challenges or just any trinkets of.

11:15:50 Try this approach. Is there anything you can give advice before they say, hey.

11:15:54 We're just not working well with them.

11:16:01 Well, I mean, as far as advice goes, I mean, you can you can chastise and scold and demand all you want. And, you know, there comes a point where it's like you said, it's not working and sometimes you do circle back and maybe it's still same old, same old and you're not getting anywhere. But like I said, we're really taking people as they come to us more often than we're going out and forcing an issue. I mean, I can't.

11:16:24 In recent memory even come up with an instance where we've had to go and be the records police. That's really not what we're in the business of doing.

11:16:33 I'll tell you. I think some of the traction we've gained in the last five, six, seven years has been, unfortunately, that folks who were obstacles have moved on.

11:16:42 Whether it's through retirement or they've just changed positions. We've had a lot of turnover at the highest leadership levels, which also makes a difference because that culture of we don't send mass emails, we don't tell people what to do is

11:16:57 Changing in the time that I've been there. So sometimes it just means waiting them out.

11:17:02 Unfortunately, I don't know if Anita has anything to add. I agree. The number of times, I mean, we have a department that's storing 500 some boxes offsite that they refuse to destroy, even though they're well past retention.

11:17:15 And when the email went out that the director was retiring, we just immediately like.

11:17:20 Pounced on his replacement of, hey, did you know you're paying $300 a month to store records that should have been destroyed in the 80s and They're like, oh, well, let's set up a call.

11:17:32 Just biding your time.

11:17:38 Okay, Pam Stewart.

11:17:43 Hi there. I was looking on your website at the trainings that you mentioned that you have available for your staff.

11:17:50 Like any of those managing faculty records or the records information management basics.

11:17:58 And it looks like those are only accessible to UVA staff. Is that correct?

11:18:03 Oh, actually, no, they're also on YouTube, but they might be unlisted. So what I can do is I can send Nicholas a link to our unlisted YouTube and you can, so we want UVA staff to go through Workday so that it's recorded in the learning management system, but we have them up on YouTube too.

11:18:19 That would be terrific. I would be very interested and appreciative. Thank you.

11:18:22 I will send Nicholas a link. Yeah.

11:18:29 Wayne Lyle.

11:18:34 I was just going to ask if the slide deck will be sent out to everyone.

11:18:40 We're fine with that. Whatever Nicholas wants to do is fine.

11:18:44 Thank you so much.

11:18:46 Typically, what we'll do is we'll include it on the website where we have the recording and the meeting minutes and everything.

11:18:55 And we'll send out an email, let everybody know when everything's up there.

11:19:05 Okay. I have a few questions. I was... Taking notes.

11:19:10 A few questions about training and then training Well, let me ask this one first, and then we'll go to train. So you've all mentioned that you… at one time had been in two different departments within your Within the system. Where do you feel that you mentioned IT and then compliance

11:19:32 Where do you feel that records management best fits? And if you could share any… pros or cons to one department versus the other.

11:19:40 And how that works for you.

11:19:45 I think being in IT had some definite advantages. Being close to the folks who are making the decisions about systems, about Microsoft. We were still with IT And really in close proximity to information security until about 2017-ish. So we were there during the 365 changeover.

11:20:11 So that helped because we were in direct contact with the people who were making the decisions.

11:20:17 There was a… a couple of years there, 18, 19, when we did switch over to audit and compliance where the relationship with IT got kind of severed.

11:20:28 And that was difficult because we were no longer in the club and we didn't have all of those contacts anymore. So we also didn't have the sort of you have to work with us. We work in your division kind of thing going for us either. So once we were sort of outside that circle, it was a little more difficult, but we have

11:20:47 In the years since then really worked hard and have some really great contacts with IT now. We stuck with it. We made it through the times where people were kind of ignoring us a little bit more than they used to.

11:20:59 I personally like where we are in audit and compliance because in a way we are a compliance function we are being there near audit helps them to understand that we are part of the compliance function. So they've built in some questions in internal audit

11:21:19 That pertain to records and information management. And we've received some emails from the auditors saying, you know, a department has claimed this. Is this true? Can you substantiate this? And, you know, so we're part of that process too. I'm not sure if Anita has anything else to add, but I like where we are.

11:21:34 I agree. I think being in IT made more sense and got us further. I think the other thing with audit, so the way our structure, we report to compliance, compliance reports to audit.

11:21:44 No one is happy to see audit coming. So when people ask where we report to.

11:21:51 I'm more likely to say compliance and leave audit off entirely.

11:21:56 Because the university's chief compliance officer has been at the university for close to 30 years. He is well respected, well liked, well regarded.

11:22:08 So no one gets their backup if I say, oh, I report to Gary.

11:22:14 So I think just knowing that dynamic too, that like people are going to get a little more about audit.

11:22:20 And not leaning into that relationship as much. Internally, at least. Yes. Yeah.

11:22:30 I have two questions about training. I'll try to just put them… Put them together.

11:22:37 You all had mentioned trial studies and having everybody doing something different. What do you feel has been has worked best and your records management program to get Everyone, well, not everyone, but the ones that do the same things.

11:22:55 On the same page. Or have you gotten any success with that?

11:23:00 And then the second training question is, with the mandatory training.

11:23:05 For the academics that you mentioned. Had it on a 10-minute… training.

11:23:12 Was it hard and how did you go about condensing it down?

11:23:17 To the 10 minutes.

11:23:22 So in terms of the research, that was an early identified problem because we actually were the subject of an investigation. The federal government came in and said, we want to see the records for this study.

11:23:34 Where are they and the department? Couldn't locate them. And that was a problem.

11:23:40 We actually had another thing happen several years after that where they came in after we had implemented Gimel Physical and Caroline had done a lot of legwork to get the departments that do clinical trial studies together in a room. We were actually there yesterday at a research coordinators

11:23:55 Not yesterday, a couple weeks ago, research coordinators meeting where they do get their people together. So we needed to get into that group.

11:24:03 So we did and we've done that periodically over the years.

11:24:06 So they are very aware of us. We have asked for a seat at the table when they talk about central systems for managing clinical trial.

11:24:16 Data, whether it's sort of high level tracking or what have you or electronic storage So really, it's just kind of getting yourself in there, making yourself known.

11:24:25 And I'll say a gimmel physical, the reason that Influinx was selected, the main reason was because we wanted to solidify tracking of clinical trial and research records.

11:24:36 Right now, we've got just under 10,000 boxes being tracked, active boxes, and more than 50% of those are research. So we've actually connected the different disparate departments that might work on the same trial together. So we've got the pharmacies piece of the puzzle along with the department's piece of the puzzle. So when

the FDA comes in and says, we want to see this, we can point them to both locations.

11:25:01 Obviously, this is an opt-in, so we haven't been able to force anyone to use this But we have we have a lot of it already being tracked and we have a couple departments that are really big super users like pharmacy where they have a little piece of all of it. So we're at least tracking that.

11:25:20 It's been good. I think it's been successful but Obviously, it's not 100%. We can't force it. It's not the UVA way.

11:25:30 Anita answer the second. And I'll say for the training, it was really hard to get it down to 10 minutes.

11:25:37 And we had to be brutal and decide upfront, if people leave this with nothing else, what do we want them to leave it with?

11:25:45 So like, I can tell you, we don't talk about the schedules. We don't talk about the RM3. The entire takeaway of that 10 minute training is There's a law you have to keep you have to manage your records. Don't worry how you're going to do that. We're going to help you figure that out.

11:26:00 But you need to understand there's a law. And so just really leaned into this is the Public Records Act. This is the definition of a record.

11:26:09 Guess what? You have records everywhere. They're in paper. They're electronic. You're creating them in email. You're creating them every time you send a Teams message.

11:26:18 And then the other piece of that that we decided to focus on so like maybe for public schools, maybe for you all it's more FERPA. For us, it was FOIA.

11:26:29 So we leaned into that. You've got records. We'll help you figure out how to manage them, but you've got them and they're all foyable. And so that was our main message, just getting people to understand and deciding that this isn't the time when we're going to

walk you through filling out an RM3. This isn't the time we're going to walk you through how to search our database.

11:26:50 Just know you have an obligation.

11:26:57 So this is T. I wanted to piggyback off of what Anita said about the training. So before you all rolled it out, Anita sent me the training for me to just go through it as the analyst for public education.

11:27:09 But I wanted to just piggyback on the points you made. Even though it was a 10 minute training, I want to emphasize that it didn't feel like 10 minutes.

11:27:17 And I'm not even a UVA employee. I really felt as though the training emphasized accountability for the actual law.

11:27:25 And it made an awareness of records management as a thing.

11:27:28 Just like Anita said, it mentioned nothing about certificate of records destruction. It wasn't technical. It's just all about the awareness. And if you're able to disseminate that information at the bare minimum.

11:27:40 That is a more proactive approach than them not knowing a thing.

11:27:43 I want to emphasize that because I want to emphasize that with public records in any event that is something wrong, that hits the news fast.

11:27:53 So I would rather… an agency to know of records management internally rather than the news article that comes out about the error or improper management of records and things of that nature. So what was great is that you also tied in, like you said, FOIA. You want to make those connections so people are aware of the records that are managed and maintained.

11:28:16 Are connected to records requests. So even though those folks may not touch a record in their eyes, they do.

11:28:23 They fall in compliance with the Virginia Public Records Act. So just disseminating that information, even if it's a three minute video.

11:28:30 That 10 minutes did not feel like 10 minutes. So that's just to emphasize that in the public schools level, I did have some people to ask me.

11:28:38 About training videos. I advocate for it. If you're able to make it fun by having scenarios like UVA did.

11:28:45 That makes people not think about just wording, information, video. Having scenario-based instructions make us more interactive. So I just want to give praises to how that is something that can happen if you're able to do so.

11:29:01 In your divisions. One final question for me and i'm going to shut up.

11:29:11 How have you been able... If you have, able to connect the dots between physical space because people tend to want to get rid of things that are taking up physical space they can see It's physical.

11:29:26 And digital space and digital space destruction of... electronic records.

11:29:34 Or data. It's hard.

11:29:39 With Gimel Physical, early on. We had it configured before GIML branched out into all of its management of electronic stuff. We configured our version of it to actually keep track of electronic. And that comes into play with the clinical trial records as well, because we say, are you running a hybrid system? Do you have paper and electronic? And they go, oh yeah, we have stuff on a shared drive.

11:29:58 I say enter that in as well so that when the destruction date comes up, they both come up and you say, oh, I forgot that that was on the O drive.

11:30:06 I can see the paper. It's sitting in front of me on a shelf, but I forgot that that was there. So, you know, that's part of it. But again, that's an opt-in to use Irma to do that.

11:30:18 It's tough. We were able to put in some retention and Teams chats and team you know and the files stuff, it's again an opt-in. So we

just have to keep harping on it. I don't know. Other than just telling people that they need to do it as much as we can, offering that tree size, which

11:30:38 A plug for tree size because it's like $60 a license. So if share dries are a problem for you, that is a terrific, inexpensive product to work with.

11:30:49 I'm not sure that there is any magic spell that you can put on people to remember electronic records exist, unfortunately.

11:30:58 What I wish we could do. So the way it works at UVA, we have our IT uses a ticketing system called ServiceNow.

11:31:05 And when you want to add more space to your space Share Drive, you put in a ticket and you say, I need an extra 250 gigs.

11:31:13 In a perfect world, we would be a part of the workflow. So instead of IT saying, okay, here you go, we'd get that email too and say.

11:31:21 Why? What you doing with it? So yeah, there's always something else. It would be nice if we could do but But IT doesn't want us a part of that.

11:31:35 Melissa, I see your question in the chat. Are you able to unmute and elaborate on that? Are you asking that from the UVA staff?

11:31:47 Do they have a... training or you who are you asking?

11:31:51 Who does the training exist?

11:32:03 I don't think that you'd be able to take hours and necessarily rework it very easily.

11:32:08 I'm not sure. I'm not sure I can answer that question. You're certainly, oh, T says she wants to chime in.

11:32:20 So we don't have any training that is specific for public schools.

11:32:25 Right now, the Library of Virginia has its YouTube page solely for records management and we have different topics of videos. You can always start there.

11:32:37 The basic, and it's called records management basics. We have what is the public record, records management basics for Virginia Public Records Act.

11:32:45 And also the importance of records management and retention of public records. So at the moment, if you wanted to just disseminate that type of information You and your staff and your division are more than welcome to just look at those videos. If you wanted something more concentrated specifically for your school division.

11:33:02 I can work along with you so that we can develop that. But other than that, we don't have anything concrete and one example. I can tell you that I previewed the VDOE website and it has dated public schools resources.

11:33:17 They had the dated schedule. And in addition to that, they had an old records management basic PowerPoint that's, I believe it's older than me.

11:33:26 So with that being said, I did contact the VDOE and I am creating a more modern and more updated PowerPoints for records management basics for public schools.

11:33:38 That is in the final stages. If you all want me to, I can put something out on EdSIG about the update. But I just want to make sure that I supported that answer that question you had, Melissa.

11:33:49 We can work together. Just send me an email and we can see what we can do to help you out at your school system.

11:33:59 Are there any other questions from the group? If so, if you could please… Raise your hand so we can identify you.

11:34:22 Okay. Seeing that we don't have any right now. I just want to say a big thank you to Anita and Jesse for coming.

11:34:33 For agreeing to be here and then we had to reschedule because of the snow and agreeing here to be here again on this date. So we appreciate that.

11:34:41 So let's just give them a hand clap And thank them.

11:34:47 For the great presentation. We're running a little bit ahead of schedule. So what we're going to do is we're going to go ahead and take the break Now, so it'll be a little bit longer break, maybe about a roughly a half an hour, 25 minutes.

11:35:04 And then we will resume back at 12 o'clock.

12:01:36 Okay, the recording has resumed. So Tashauna, you have the floor.

12:01:43 Hello, everyone. I just wanted to give you updates. First, can you all hear me?

12:01:48 On your end, if someone can unmute themselves or drop something in the chat to confirm that you can hear me.

12:01:54 Perfect. So I wanted to go through two different things. One, I want to just give a… update on the discussions that have been in the PSRC focus group that's focusing on the short-term cumulative file.

12:02:10 Management and also management and also special education records. We did have our second meeting in February.

12:02:18 We haven't gotten too far with getting… justification as far as how we're supposed to proceed forward with the management of the records from five to seven years, but we have been discussing the challenges.

12:02:32 From there, I have been reporting as much as I can to Sam Hollins, who spoke in our previous PSRC meeting.

12:02:39 And she is… Collecting the information we're giving her and giving us information back based on their point of view from the VDOE. So I just want to let you know we do have those meetings going on and hopefully we have some type of feedback that I can share with the whole group

12:02:55 Of how you can better manage your Short-term cumulative records that were impacted as far as keeping those records for two extra years.

12:03:06 Other than that, if you have any questions, you are more than welcome to email me so I can provide more clarification for you.

12:03:13 Next, I wanted to go ahead and go over some schedule updates to GS21.

12:03:20 It is my hardcore goal to have a major update. June of this year, but they may be pushed.

12:03:28 Based on the feedback that I get from you all. So it was a document sent out about different updates that I hope we can make.

12:03:37 If needed, I am more than welcome to do updates this year.

12:03:43 And also do another update next year. It is not my goal to keep touching GS21.

12:03:48 But I just want to make sure we're accounting for records accordingly.

12:03:52 So based on what was sent out to you all, I want to go through a proposed series.

12:03:58 Two of them are non-debatable, meaning they're going to be passed through on GS21 without a focus group and without permission from public schools.

12:04:08 If you all did not know, I mentioned it in a previous PSRC meeting.

12:04:14 School systems, each division should have a school safety audit report.

12:04:19 These are generated by the Department of Criminal Justice Services. They have the report on their end and the school divisions have a record copy.

12:04:31 We do not have this on the GS21 schedule. But just to let you know, if you do not know what the school safety audits are, it is five components.

12:04:42 Three of them are housed with DCJS.

12:04:47 And the other two are housed at your actual school division. So it is very important that you communicate with your higher ups about the school safety audit report.

12:05:00 What's going to happen is I'm going to put a schedule series about the school safety audits And the retention is going to be for five years.

12:05:10 I'm still drafting how that description will look and how that cutoff event will look.

12:05:15 But the amount of years will be five years at the division level.

12:05:19 You will have a record copy while DCJS will have the official record.

12:05:25 This is so that parents and students have the reports quicker rather than going to the DCJS to retrieve it.

12:05:33 So if you would like more explanation on school safety audits, please reach out to me, but those are non debatable with adding to GS21.

12:05:44 It was presented in the PSRC meeting about special education raw data. These are notes that are recorded for special education students when they're working with their therapists.

12:05:56 Or counselors. And it was the question of what do we do with that data?

12:06:02 So based on discussion within the group. I would like to create a new series to account for those notes that are collected.

12:06:13 Of course, I need to write this series description and we need to agree on how many years So we keep these notes for students. So basically it's just the behavioral tracking and monitoring of students. And I was made aware that

12:06:29 That's a lot of documentation. If you would like more clarification on that, please let me know.

12:06:35 But those are... Concentrating on proposed series for GS21.

12:06:44 Next, I carefully analyzed the GS21 schedule. If you were to look at the short-term cumulative file record.

12:06:54 It is accounting for the cumulative health record records, special education records.

12:07:02 And basically, I want to make sure we're not repetitive in the schedule.

12:07:08 I am proposing to remove one the special education record series, and it's two of them.

12:07:16 Those series are basically just talking about what special education records are.

12:07:21 Special education workers are already adhering to the short-term cumulative record series.

12:07:28 So it's really no reason to have special education record series as well.

12:07:36 To help you out with understanding what special education records are. I'm more than welcome to have a web page.

12:07:44 On the Library of Virginia Records Management site to elaborate on what special education records are.

12:07:50 But I just feel as though it may not be a need to have these actual series.

12:07:55 This is the same thing with the cumulative health record. That is already being accounted for in the short-term cumulative file for students.

12:08:05 So we may not need that actual series. And last but not least, the ESL and ELL records.

12:08:13 I am being told that's already being identified with the short-term keen to file series.

12:08:21 So with that being said, I want to discuss removing those series from the schedule as they are accounted for in the short-term cumulative file.

12:08:35 Next, we all know that the short-term cumulative file series was impacted.

12:08:42 Starting this school year. The retention went from five to seven years.

12:08:47 So as I am conducting training with public schools, many school systems are saying.

12:08:53 Hey, there are other series that should also be increased because We don't have the time or the staff to keep touching and managing these records every five and seven years.

12:09:06 Why not make all of those series seven years? All of those series include student discipline expulsion records.

12:09:16 Student legal records. And also threat assessments.

12:09:20 So I wanted to get a poll. About if these series should also be increased to seven years.

12:09:27 This will help you out with not having to keep touching records every five and seven years.

12:09:36 What's going to happen is just to get you all's feedback, of course, we can talk about it in PSRC as a group.

12:09:43 I want to use some type of tool to send out to get a poll.

12:09:47 About these different proposed changes. To get a fair assessment and I can share the results before I make an actual change.

12:09:55 So be on the lookout for me to disseminate that information so I can get your feedback.

12:10:01 And last but not least, we can talk about this in the chat.

12:10:06 I know we're kind of tight on time. I just had 15 minutes, but I just wanted to clarify this document.

12:10:13 There are two series in the GS21 schedule that I wanted to talk about.

12:10:20 If anyone can tell me the difference between the strategic plan series in the accreditation record series.

12:10:28 I would love to know. Based on my interpretation of GS21, These series kind of mimic each other, but I don't work for public schools. I work for public libraries.

12:10:39 So if you can give me feedback on the difference between strategic plan and accreditation records.

12:10:47 That would be great. You do not have to answer it today.

12:10:51 You can email me because if anything, I would like to combine these series.

12:10:57 And last but not least, before I end, it's another clarification that I need.

12:11:02 We have a series called Academic Progress Records. I was wondering if I can combine that series with grade records.

12:11:15 The question is, are academic progress records used in reference to determine a grade for a student?

12:11:22 So this is a lot that I have shared. If you all can email me back clarification so I can start thinking about it, that will be great.

12:11:33 If you need me to rescind this entire sheet. You may have missed the email. Let me know. I need the feedback.

12:11:42 So that I can make changes appropriately. And before I end, there has been a proposal to change the organization of GS21. What does that mean?

12:11:55 The GS21 schedule talks about student records and non-student records. So it's been proposed to organize that.

12:12:04 Have a section of GS21 that's all about student records. Then have another section about non-student records. This is just to boost the organization.

12:12:15 In order for me to get that feedback, I will have to send out a poll.

12:12:19 Also, it is very essential that I get a nice number of people to participate.

12:12:25 I can't make a drastic decision like this with just five people's feedback.

12:12:30 It's going to take a mass number of people for me to a whole overhaul with the organization of GS21 as far as the organization.

12:12:40 So I just wanted to put all of that out there.

12:12:43 I will follow up with having polls and everything regarding what everything that I said.

12:12:48 But I just wanted to start that conversation and break down what I have ideas for.

12:12:56 Pam Stewart asks, do you have a date you would like feedback by?

12:13:01 This is March. Time is flying. If we were trying to make a big update in June.

12:13:08 I would need it within the next 30 days. Even though I would love to have an update June 2025, the way it's looking is going to be longer.

12:13:17 I was told if we make an update, it's not good to do it in the middle of the year.

12:13:22 I've been told that it's best to wait until the end of the year because Public schools have a different way of how you approach your records rather than any other locality.

12:13:34 So with that being said, we may have to push June 2026. I have no problem with it to make sure things are done correctly.

12:13:42 So the sooner I can have this feedback, the better. Even if I make one change, that's fine.

12:13:49 But I'ma need you all's feedback. And from there, I'll be able to move forward.

12:13:55 But I look forward to having all of this in a polled version as soon as possible.

12:14:01 Pam also asks, what retention was being discussed for raw data, three years. I'm not sure. I need that. I have no idea how long we're aiming to have those raw data for special education records.

12:14:14 That's the feedback that I need.

12:14:21 So other than that, feel free to email me if you have questions.

12:14:25 And look forward to me having some type of information disseminated back out to you to gain your feedback in a poll version of some sort.

12:14:36 And that is all that I have. Did anyone have any questions for me?

12:14:44 All right. Thank you.

12:14:50 Thank you, T. So we're going to move on to our next presentation.

12:14:58 This is going to be from Strategic Solutions and we have Eric Benoit here in person.

12:15:05 And he's going to… offer his presentation titled district-wide solutions for records management And we also thank Eric for providing lunch and drinks and refreshments for those of of those of us that are here at the library.

12:15:25 So thank you, Eric. And the floor is yours.

12:15:34 Give us a few moments. We're just making sure we're mic'd and everything is set up.

12:15:38 Give us a few moments. Thank you.

12:17:20 It was working.

12:17:30 No, this is good. This is better than before.

12:17:54 And they hear, oh, can they hear? Yeah, can you all hear me on the microphone?

12:18:25 You don't hear me now on the microphone.

12:18:32 Okay. All right. Well, thanks so much, everyone, for letting me come and talk to you all this morning.

12:18:40 We're going to go here. All right.

12:18:46 So I'm here to show you our solution. It is called SC View.

12:18:52 Scview is a… web-based software solution and We are a company based out of Ohio and we're new to the Virginia Market. I'm a Virginia native. I went to school in Virginia Beach City Public Schools.

12:19:09 I taught in Virgin Beach City Public Schools and in Chesapeake.

12:19:13 And so… I'm very familiar with Virginia obviously Our solution, SCView, is an Ohio based company And we're coming new to this area. So what I'm finding in Virginia is there are with records management, let's say there's seven different problems and it seems like the Virginia public schools and i will say this is North Carolina as well.

12:19:37 They seem to have five different solutions for seven problems. And, you know, obviously that's a simplified view, but SEView is designed to be a kind of a one-stop shop for public schools. So we work with over a thousand school districts. We basically work with every single school district in Ohio, a majority in Pennsylvania, Indiana, Michigan.

12:20:00 And so we're coming into the Virginia market and We are competitors with solutions such as scribbles and parchment and frontline and power schools and DocuSign. And so we have solutions really for the whole district.

12:20:17 At the core, SCView is a digital archive system. So I've got my home screen here, but the search feature is the And so it's an archive system with different departments you can organize.

12:20:32 This is my personal one. And so I've got some for like my church up here and even for my wife's personal business and of course my demo materials.

12:20:41 And then under that, we can have different document types. So I'm going to just show you student records.

12:20:46 And then we've got these different index fields. So when I change the document type.

12:20:50 It's a dynamic index field. So if I did request for purchase orders.

12:20:55 It's going to be based on vendor name and grant totals. This is completely customizable.

12:21:00 Obviously, student records make sense for last name, first name, date of birth.

12:21:04 But you could have it theoretically set up with social security number or student ID or

12:21:12 Region within the school district so whatever We also have a retention date over here. And so I can look up students based on whatever. So I'll look up Again, these are all fake records.

12:21:26 And so here, and then I'll pull up. Okay.

12:21:37 Okay. And then so from here, I am able to access this record. I've got my thumbnail version over here.

12:21:44 This is customizable. I can move that around if I need to.

12:21:48 I can hide the retention stuff if I need to but you know Obviously, you probably don't. And then up here, you have a series of different tools. So if it's scanned in.

12:21:58 You can easily rotate those to accommodate that. If you want to email this out, all you'd have to do is go over here, go to right click, and you can email it directly from the system.

12:22:10 So you don't have to pull it somewhere else if you want to print it.

12:22:13 Obviously, you can print it to a an actual physical printer or if you want to print it over to, you know, save it as a PDF, you can do that as well.

12:22:22 But before I want to print this or send it, I of course want to hide the social security number.

12:22:27 So I can use this redaction feature. I can drag and drop and I can easily move that around for whatever I want to redact.

12:22:38 So then from here, I can print it off. And on SCView, it's a two-dimensional, well, three-dimensional object where this is laying on top of it.

12:22:47 Once it's printed off or it's sent via PDF, obviously the redaction is permanent So you can't remove that. But we never want to leave anything here permanent so I can easily just right click and delete it.

12:22:59 We have other tools such as the highlight ability, and I can even put a sticky note And I can say.

12:23:08 Please correct this. I can do whatever I can.

12:23:13 Scribble if I need to, and all these things are easily removable after I do that.

12:23:21 Of course, zoom in and zoom out features. If I want to add to this document, all I have to do is click this append pages.

12:23:28 And yep. Nope, not at all.

12:23:56 How about this? Does this sound better here?

12:24:03 Okay, perfect. All right. So sorry about that.

12:24:09 I don't know what you were able to hear, though. I'm just going to go back real quick. So SCView is an archive system at the core We have a lot of different solutions that compete with a lot of different products in Virginia.

12:24:27 We compete with things like power schools and frontline and DocuSign and Vital Records and DOMA and Frontline and Scribbles and

Parchment and indeed my transcript. And so these are all different solutions in Virginia for small problems. So for instance, like need my transcript.

12:24:43 They're able to house documents and they're able to provide transcripts. We can do that as well, but then we can also have solutions for human resources for finance departments for Lots of those things.

12:24:56 Here with my archive system, I can type in a person's name to find all those different hits and then I can pull up their record.

12:25:07 This document. And then from here, I can use different solutions or different features. So like redaction, I can highlight, I can add sticky notes.

12:25:18 I can do things like that. I can easily right click and I can print or I can email it directly from here.

12:25:25 I can even remove certain pages. So let's say that the person who scanned this in, there's 40 pages here.

12:25:33 Really, it's two different records. And so what they should do is, I'm going to try to do this with one hand.

12:25:40 They should be able to remove that. So I just did shift and then click. And then I can cut those pages And then I can put them back in here.

12:25:55 And I can either put, you know, I can move them around to put them at a different part of the document, or I can even create a new document altogether.

12:26:03 Again, so let's say that those two students were in the box together and they were scanned inappropriately as one file.

12:26:09 And now I can just add a new record there. If for some reason I notice that Ezekiel Benoit, his Birth date here is incorrect. You know, it's 1115 when it should be 1105. Obviously, you want to check the record to confirm that, but you can right click in there, edit, and then you can pull up all of his index information.

12:26:33 And then you can easily edit that there. Okay, so you can do that if you need to.

12:26:43 We also have retention documents here. So I'm going to clear this search and let's say that I want to look for a document with the retention of Sometime in… say 2025 to 2025

12:27:03 2040, right? So I can pull up that way and I can find all the, did I not type it in right I'm trying to do this one-handed because I have to hold the microphone.

12:27:18 Okay, perfect. And so for retention, again, that could just be a feature that I might want to use for that.

12:27:24 I also have OCR features so I can type in a a word and i can and pull up every time it's used.

12:27:35 And so here it shows me these are the six documents that actually have that word citizen. And then over here in the right column, it even tells me what page it is. So I can click on that and it'll jump right to that and it'll highlight those times that word is used. So we can use OCR to look for any particular document

12:27:57 That we have. We also have, again, this is just like the core archive feature. Any quick questions there about that?

12:28:05 About the archive stuff. Yes, T.

12:28:12 Hi, this is Steve from the Library of Virginia. So looking at your screen, it says retention. Does that retention mean that's when it's eligible for destruction?

12:28:21 And is that something that's placed within the system from the beginning? Can you change retention throughout? And what is the system of of how you're able to actually delete records.

12:28:38 Great question. So retention is just an additional index. So think of retention Just as you would maybe first name. So this is something that you can add to the documents. Again, you can easily edit them just like I edited the birth date. I can go to right click edit and I can change the

12:28:58 Retention date here. If I need to do that. Typically, people use retention for the destruction purpose, right? So at the end of 2025, you can look and do a search for everything that needs to be destroyed in 2025. And then you can select all those documents and then delete them right from the system.

12:29:17 Near instantly. Does that answer your question? Okay.

12:29:24 All right. Any other questions?

12:29:30 I have one and it's regarding the retention as well. When these documents are added.

12:29:38 Is that retention field or any of the fields Or can they, if they're not, can they be made mandatory before the document is entered in the system?

12:29:49 Yes, absolutely. So as an admin, I can go to here and I can go to document types.

12:29:55 And this is basically the back end of what is going on. But then for Demo materials, student records i can determine what is required and what's not easily.

12:30:14 So yeah, so as far as uploading documents, there's a couple different ways of doing that.

12:30:21 Obviously, so we are a... There's one more chat.

12:30:35 So I'm going to speak. I'm going to ask Melissa's question. Does the system tell you the amount of what you're deleting, like the megabytes for filling out the destruction forms for the Library of Virginia?

12:30:46 So just to let you know, when it's time for records to be destroyed, they have to submit a RM3 or certificate of Records Destruction.

12:30:54 It helps out if your document management system can say how much data I'm sorry, what records is being destroyed. Is that something that is generated for how much as far as the volume for records that are being destroyed at that moment?

12:31:14 Do you need that information? So I definitely know you know you'll know on the back end.

12:31:20 And so after it's deleted, you can easily track what's deleted.

12:31:24 I think beforehand. You're able to I'm just thinking about how we would do it in the system. I think you would select all the different documents and then see what you've highlighted, and then you can see the data footprint that way. You can also see the image count that way.

12:31:41 But I would need to investigate that a little more. Before I give a more robust answer.

12:31:50 Once the documents have been deleted, are they recoverable? So yes and no.

12:31:59 If you want them to be deleted forever, forever. We can, but we do have a… back door way of finding things if we really have to.

12:32:12 It just, you tell us if you want that turned on or not.

12:32:16 So if when you say delete, you actually mean delete forever.

12:32:23 We can have that actually go away forever. But if you want to have like a last minute just in case.

12:32:29 We can have that turned on as well. It'll take some work to find the document though.

12:32:34 I did that once and it was a very stressful 35 minutes. But yeah, I found it.

12:32:41 Okay. So one thing is you don't want everybody, obviously, with the permission to delete.

12:32:46 And so we have ways to, so if we went to admin and then we go to users. Obviously, you have to be an admin to have this permission.

12:32:57 But then you can see all the different users and what they are. So for instance, my wife, again, she uses this for her personal business. In doc types, she has access to her personal business records, but she

doesn't have access to any of these other doc types, right? And so you can set this up.

12:33:13 At a department level where, again, it's appropriate for one individual to maybe have access to human resource documents, but not to finance documents or the like.

12:33:23 Additionally, in here, you can set up different permissions for what they're allowed to do. So typically.

12:33:28 We don't want to give anybody delete permission. We want to use that very selectively.

12:33:34 So even with my wife's own documents, I haven't given her delete permissions just in case, right? Because we don't want to have to find it if we do lose it. But I can easily. So let's say for these particular ones, I want to give her the ability just to view them, I can easily just remove these features.

12:33:55 Oops. And now she can only find the document and see it, right? But here, for these types of documents, she can't even look for those particular things.

12:34:06 So it's easy to do. You can do that on a group level. You can do that on an individual level, whatever makes sense.

12:34:15 Okay, so aside from the archive features, we also have a lot of different tools. So something like forms and workflows is going to be a big one.

12:34:25 So if I go here to home, we can basically take any paper form and make it into an electronic process. So for instance, we have for my church, we use these documents.

12:34:42 For like a renter agreement. And so we can take this and we can give the general terms and we can make them fill out. Again, they're going to be renting the facility and we can put all those in there and then make it into a signature request and then they have to sign it and then I can track

12:34:56 Those documents that are being signed, as well as my wife uses it for her own intake forms when she has a new patient. So let's say that I'm going to do a new form and I'm going to pretend to be a new patient for my wife. Again, the client is sent this, they fill this out. And then once it's filled out, it then goes into a workflow.

12:35:21 And we can completely customize this workflow to make sense. So for my wife's documents, it would go here.

12:35:29 To be reviewed and so The form is filled out and then she's able to click on the document and She can see, okay, did the person fill it out correctly? If so, great. I can press fully reviewed and then it's saved long term.

12:35:47 But maybe the person accidentally checked two boxes when they're only supposed to check one. She can press return for edits.

12:35:55 And then she'll explain why. To the client.

12:36:01 And typing with one hand. Check two boxes, pressed OK. And then that person, the form is actually removed from the workflow and it's sent back into an email that we've already created.

12:36:14 So we can take any paper process. So something like a transcript request. At the end of the day, a transcript request is a paper process where you're behind the desk with the student records and a person comes up to you and says.

12:36:26 Gives you their paper form and says, hey, I've got, there's my paper form request. Can you please process this request and give it to me?

12:36:33 We can take that and we can automate that. So for example, Gloucester County Public Schools is one of our clients, and I do have their permission to show this to you.

12:36:44 So I can log into their system. And they have their transcripts come through here. So if I were to go to Gloucester County Public Schools.

12:36:56 Give me one second. Let me type this in.

12:37:12 So this is their student services page. I can go down to student records and I can submit a request here. So I click on that link. Again, that's on their website.

12:37:25 And then from here, this is basically just a paper form that they fill out. So they say, all right, I am a former student, and then they have this particular these particular things that they need to fill out. We do make this mandatory.

12:37:39 So you can't move forward unless you fill out certain things. But this form is completely customizable.

12:37:47 For obviously for the school district, they've got their logo up there, but we can make this form have whatever you want. They have, again, tell you whether they want it electronic, what record type it is, and then you can even be required to sign and um

12:38:05 Then they also have their payment system all set up. So it's all within that form. So before the form can even go through.

12:38:12 It'll make a required payment request. What's different from scribbles or from Parchment or from something like that is that you don't need to create an account.

12:38:19 To be able to do this, anybody can do it. So a third party can do it. And Gloucester chose to have a three

12:38:29 $1.95 convenience fee. You can set that up to be whatever you want. If you want to make it to the payment be $3,000, great.

12:38:36 We'll do that. We do not handle these fees, so this convenience fee, this does not go to us. This goes to our third party that we use.

12:38:44 Nicholas, did you have a question? Is there an option there for them to upload like ID?

12:38:51 Absolutely. I didn't see it, but I've been missing it. Yeah, so that's something easily we can do, make a required license or government ID or whatever. You could even make it be, you know, a Dominion power bill or something like that, whatever is acceptable.

12:39:07 So this whole process is completely customizable, right? So then once they complete this form, then it goes over tier into their SCView system. So this is their workflow.

12:39:19 And I will be sure to cover up any names. Okay. So Amy has nine things in her queue. So nine students.

12:39:31 And I believe she's off today, which is why there's nine there. She's very on top of things typically. So she is nine. And so if I pulled this bar down, you could see the former student's name, whatever. And if I clicked on the document, then you'd be able to see the form that that person filled out.

12:39:47 For their security, I don't want to do that. So then she'll click on that. She'll look for it. And then she can go over here into search. She can go find that particular student record and then she can print it or email it, do whatever the student requested or the third party.

12:40:00 When she's done with that, she can then send it to completed and it'll be logged here for long-term retention to prove this document was requested.

12:40:09 If she needs to send it to Michelle, I believe Michelle works in the guidance department and handles all of the students who are currently active. So it would go to Michelle and then then it goes to Michelle in her inbox.

12:40:24 Amy has selected to get a notification once a day or twice a day. You can have that set up or you can have a notification every single time one comes through Whatever you want to do, we can completely customize that.

12:40:36 Any questions about this before I… show you something different. Yes, ma'am.

12:40:44 Any records that are within your management system Who's the official custodian? Does the school division still have ownership of the records or does your document management system owned the records.

12:41:00 Yes, these are the school district's documents. They're never ours. So if you all ever wanted them back.

12:41:06 We can easily give them to you. We don't charge like an exit fee or things like that.

12:41:11 We'll basically just give them to you on an XML or CSV document.

12:41:14 We'll make that transition as easy and simple as possible. You paid for them to be uploaded, so they're yours. As far as a custodian, yes. So the district is responsible for managing them.

12:41:28 We host them. We'll guarantee their security but You'll have to be the ones to manage them.

12:41:34 If you lose something and you need us to help you find them, we can definitely do that.

12:41:39 At the end of the day, they're yours. Nicholas?

12:41:44 There's a question in the chat from Susan Gardner that says, do you have a method where other school divisions and or government agencies can request.

12:41:53 For free. I think you showed the option of with the paid Yep. So we could easily do that if you wanted us to.

12:42:03 So for here, when they went to former student, you could select third party and it's a slightly different questions. You could have an additional dropdown just for government agency.

12:42:17 And then we can remove that credit card requirement to make it free. Or maybe you want to charge them quadruple because it's the government. Great. We can do that too.

12:42:28 Okay, so aside from student transcripts, we can do any other paper process. I'm going to show you just a couple of quick ones.

12:42:53 So if you ever go to here and you can go to the frequently asked questions.

12:42:57 And then you type in forms. What custom forms are currently available?

12:43:04 This is not an exhaustive list, but this is kind of just proof of concept. These are other documents that are document forms and workflows that other school districts have created.

12:43:14 So building request forms. A credit card change form, an enrollment form, a grievance form, field trip form. So we can take any of these processes and customize them to your exact specifications of what you want.

12:43:30 As well, when they do submit the form, so for a grievance form, maybe you want it to be based on the school level.

12:43:37 And so if agreements form is filled out, it goes directly to the principal of that school. Okay, great. Or maybe you want it to go directly to the human resource department that we can do that as well.

12:43:48 So we can set up whatever system you want. It's completely customizable. So the advantages are we centralize all the documents in one spot. So instead of having maintenance with their solution and finance with their solution and HR and student records.

12:44:03 It's all in one location. Obviously, different people have different access to those things.

12:44:09 But it's all but it's all kept safe. We can do FOIA requests as well.

12:44:15 Can all come through here. Again, we can take any paper process and make it electronic.

12:44:21 I do have solutions for human resources, like specific for employee hiring and for onboarding.

12:44:28 I'm not going to show them to you just for sake of time.

12:44:32 But we do have that as well. We also have a substitute finder module coming out this summer.

12:44:37 It's finishing up beta testing right now. But what we want to be is we want to be a one-stop shop for school districts when it comes to records retention.

12:44:48 In Ohio, we are connected to the state finance system. We're not there yet in Virginia because we're still so new to the market. That is definitely something we can easily do is to integrate with those other statewide things.

12:45:03 Two last things. One is in the chat, I put in my contact information with my email address. If anybody wants to set up a meeting with me where I can walk through more specifics with your scenarios.

12:45:19 Or talk through what these types of solutions cost. Again, I would say we're a lot less expensive than options like Frontline and Scribbles.

12:45:29 But I can talk through that and give you those specifics. But if you set up a meeting with me or at least email me this week.

12:45:34 Then I'll be able to take off $2,000 for the first year at least.

12:45:39 So that's just a little bit of incentive. So I would love to get an email from you all if you want to set up a time for me to be able to do that.

12:45:48 Last thing before I answer any last minute questions is We have… the most popular button on our system is this wink face up here. So if you're ever… been looking at records all day long. You can go over here and you can get a terrible dad joke.

12:46:14 And there's always a new one. So it's our most popular button and it's does the most, right? So, all right. Any other last questions?

12:46:35 There's a question in the chat that says from Melissa Sexton, does anyone use the system for active student records Not just archiving former students. And that's one I was going to ask too. What you demoed today more of an archival system or is it also maintaining active

12:46:54 Employees or active students or Yes. Anything. Correct. Yes. So it can be used for active students, yes.

12:47:02 Yep. I know that there's schools in Ohio that are doing that. I don't think, so right now we're working with Appomattox and Gloucester so far in Virginia, again, because we've been here less than a year.

12:47:13 But I don't know what, I don't think they're using the active student records.

12:47:18 But you can because it's so easy to add. Again, so I think I showed you, you can just press that one button. You can also, I don't have an option because this isn't my computer, but you can basically just go into your folder. You can just drag and drop it into the into the document.

12:47:32 You can drag and drop the document right in there.

12:47:37 Any other questions? I have one. You touched on fees.

12:47:44 Is there anything you can say in a general setting about fees or is it more division specific based on student enrollment or how many requests you receive or things like that. Yeah, so typically and we can, again, we can customize this a little bit, but typically what we do

12:48:02 Is we price for unlimited users for the school district.

12:48:11 And we do different pricing for the annual fee based on the student population size. So there's different tiers that we have.

12:48:18 So the student population determines that. So that's the core feature, the core archive.

12:48:25 And then after that, we have these different solutions. So maybe you want to do the hiring module, but you don't want to do the HR onboarding module.

12:48:32 Well, those come with just different modules that you can add on with different fees. So it's kind of a la carte where you can pick and choose different solutions. Maybe you like the e-signing and the forms

and workflows, but you don't need the HR. You want to stick to frontline. Okay, great. You can do that too.

12:48:50 Again, I'd be happy to go through any of those specifics with your district in a meeting.

12:49:00 Okay. Well, again, thank you all so much for having me. I really appreciate it.

12:49:05 I turn it over to one of y'all. Thank you, Eric. Let's give Eric a big hand clap. Thank him for participating and reaching out to us and for lunch today.

12:49:18 And for his presentation.

12:49:24 Before I go to Closing remarks. Is there anybody else?

12:49:28 That has comments or anything they would like to add before we close it out.

12:49:42 Okay, so I just wanted to thank everyone for coming and participating. Your participation makes this worthwhile.

12:49:50 I wanted to let everyone know about our next meeting and it's our final meeting for the year, which is on April 30th.

12:49:58 We have… a basic outline of what's going to happen during that meeting.

12:50:03 We have someone from the FOIA Council that will be doing a presentation.

12:50:09 If you would like to join us here in person at the library, we are going to have a tour of the library available.

12:50:18 And… And we'll have another vendor and a vendor presentation.

12:50:24 So we hope to offer breakfast or lunch or something like that. So if you're able to and you're near the library or you want to come out and see us, please make plans to come.

12:50:33 In person on the 30th, if that works for you. And please also consider volunteering for next year. I'll say that three times. Please, please, please.

12:50:44 Reach out to me and reach out to me And we can talk. And if you're not sure about it, just reach out and we can talk about how Mike could help out.

12:50:56 Alrighty, thank you all very much. And this concludes our March meeting that was rescheduled from February.

12:51:03 Y'all have a good day. Bye.