

CFISD COMPLIANCE COURSE (2020-21)



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Module 4: Records Management

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Introduction

Proper management of school district records, whether in paper or electronic form, is not only a necessary part of every staff person's job, it is also a legal requirement. The Texas Local Government Records Act, Chapter 201, states that as a public school district employee, you have an obligation to correctly and efficiently maintain the records in your possession to comply with standards for public access, parent/student access, and for legal or audit purposes.

All employees must know the records for which they are responsible, the length of time they must be retained, and how to maintain and then discard them in the correct and legal manner.

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What is a record and why do we care?

According to Texas Local Government Code Section 201,003, a School District record:

- Documents the transaction of district activity and business;
- Is created or received by a school district staff person or board member on paper, by mail, DISTRICT OR PERSONAL ELECTRONIC DEVICES, etc;
- Is a record whether open (available for public access) or closed;
- May exist in any medium -paper, electronic, photo, film, web post, text message, etc.

School records **DO NOT** include extra copies of the original document, blank forms, or stocks of publications.

The process of managing records is important for the following reasons:

- Improves access to information;
- Controls the amount of materials taking up valuable office, server or cloud space;
- Reduces operating costs;
- Minimizes litigation risks;
- Safeguards vital information.



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Think about it...

Which of the following is NOT considered a district record?

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Multichoice

Answer 1: Student Report Card

Response 1 That is incorrect!

Student report cards, electronic purchase orders, and e-mails concerning students are all district records. Blank forms, such as unused Math worksheets would NOT be considered school district records.

Score 1

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Answer 2: Electronic Purchase Order

Response 2 That is incorrect!

Student report cards, electronic purchase orders, and e-mails concerning students are all district records. Blank forms, such as unused Math worksheets would NOT be considered school district records.

Score 0

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Answer 3: Email concerning a student from parent to teacher

Response 3 That is incorrect!

Student report cards, electronic purchase orders, and e-mails concerning students are all district records. Blank forms, such as unused Math worksheets would NOT be considered school district records.

Score 0

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Answer 4: Unused Math worksheets

Response 4 That is correct!

Student report cards, electronic purchase orders, and e-mails concerning students are all district records. Blank forms, such as unused Math worksheets would NOT be considered school district records.

Score 1

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The Texas State Library and Archives Commission (TSLAC) sets the required minimum standards for records management in local governments. The commission has created RETENTION SCHEDULES which Cy-Fair ISD must follow in order to comply with the law. These schedules list the types of records that a school district is required to keep, and specifies the amount of time we are required to maintain that type of record. This requirement is addressed in our Board Policy CPC (Legal) and CPC (Local).

Using the TSLAC requirements, the Cy-Fair ISD Records Center posts retention requirements for most district records on the intranet, <http://inside.cfisd.net/>


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- ▶ Student Services
- ▶ Technology
- ▶ Transportation

RECORDS CENTER

These short videos can be used for new staff training or to answer the most common questions about records management... Have a look!

- Records Destruction (Shredding)
- Records Storage
- Records Retention

Records Retention Schedule

The links below lead to records retention schedules for various purposes.

The Records Department is available for questions pertaining to these schedules, or to create schedules specific to your area of responsibility. If you do not see the schedule or record item you are looking for, or have other questions, please contact Kathy Newman at 281-807-8140.

File	Type
CFISD Elementary and Secondary SCHOOL CAMPUS Records	PDF
CFISD Records Common to most ISC and CENTRAL DEPTS	PDF

Cy-Fair ISD Records Center Forms

(for internal district use only)

The forms below can be completed and faxed, emailed, or inter-office to the Records Center.

File	Type
Transfer of Records Request and instructions (storage)	DOC
Records Retrieval Form	DOC
Request for Authority to Destroy Records (shredding)	DOC

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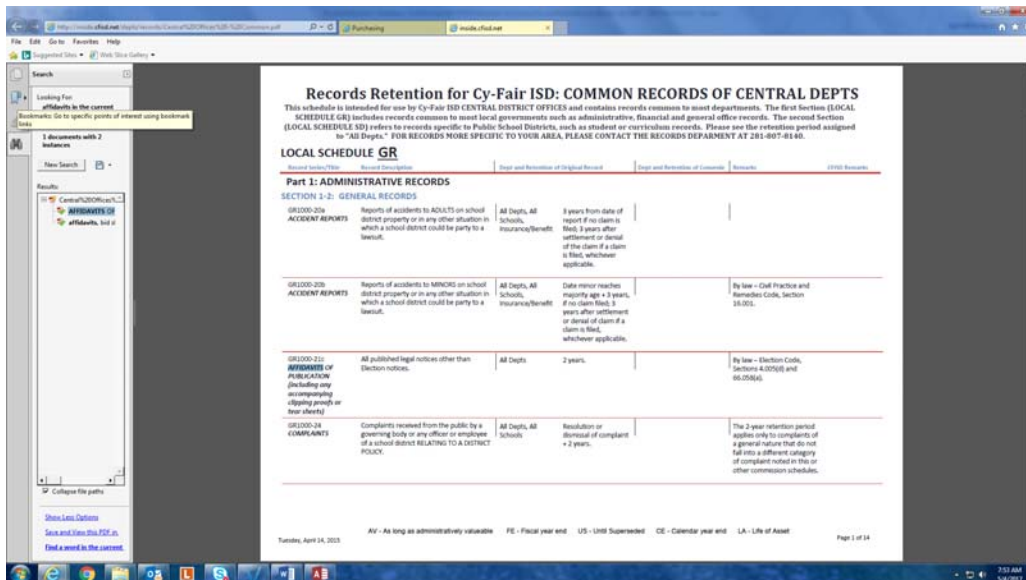
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Two retention schedules are posted on the inside.cfsd.net site. One is for records held on a school campus, and another lists records most common to district administrative departments. They are searchable PDF files, so the Adobe toolbar can be used to conduct key word searches, or to find bookmarks for certain sections.



The Intranet page does not list every category of record. If you or your department requires the retention schedule for more specific records, it is your responsibility to contact the District's Records Manager, recordsdept@cfsd.net, to obtain that information. A retention schedule specific to your department or area of responsibility can be created for your use.

Brief instructional videos about records retention, records storage and records destruction may now also be found at the very top of the Records Center Intranet page. These are very helpful for new staff, as well as for anyone needing clarification about records management.

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Email [Navigation icons]

Much of our school district business is conducted through email correspondence, and these emails are considered School District records. In order to adequately comply with most retention requirements, Cy-Fair ISD maintains our email database for a period of 5 years. During that period, any email that you have created or received through the district's Microsoft Outlook system is retrievable.



If you are responsible for records that require a retention longer than 5 years, and if those records are stored only in email form, it will be necessary for you to save those records in a different format. (Print a paper copy of the item and file it, or otherwise electronically save it for the required period of time.)

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Question 2 [Navigation icons]



Think about it...
TRUE or FALSE?

A required physical exam for athletic participation was sent to Coach Smith as an attachment in a text message. The school is required to keep these exams for 7 years, so the coach should print the document and file it with the other physicals received that year.

True/false

Answer 1: True

Response 1 That is correct!
A district record created or received on a personal electronic device needs to be retrieved and maintained for the required retention period.

Score 1

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Answer 2 : False

Response 2 That is incorrect!
A district record created or received on a personal electronic device needs to be retrieved and maintained for the required retention period.

Score 0

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Safe Storage Practices

Whether the records you hold are in paper or electronic form, it is important to use safe storage practices. The following are considered safe storage practices:

- Use a filing system (usually by year) which allows for easy access, and for removal of records when the time comes for destruction, deletion, or off-site storage.
- At least one other staff person should be aware of the location and filing system for your records, whether or not they have direct access.
- Electronic records must always be stored on a network drive such as H: or S: , or on a Cy-Fair ISD database system, such as E-School or Laserfiche. These files are securely stored and are safe for records storage. Your Desktop, C: drive, or "My Documents" folder are susceptible to loss if your desktop or laptop computer fails.
- Make sure paper records are stored at least a few inches off of the floor, and are generally secure from flood, theft, accidental destruction, and other potential damage or loss.
- Be sure that the records you use, view or store are never accessible to unauthorized persons.

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Question 3



Think about it...

Which of the following are examples of proper and safe records storage?

Multichoice

Answer 1 : The school key assignment log is stored on a USB flash drive.

Response 1 That is incorrect.
Records should always be kept securely using network drives, district databases, or secure areas of a school or office until they have met the required time of retention. They should be kept from unauthorized access.

Score 0

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Answer 2 : A reception desk computer is left unattended with an E-school student record visible to others.

Response 2 That is incorrect.
Records should always be kept securely using network drives, district databases, or secure areas of a school or office until they have met the required time of retention. They should be kept from unauthorized access.

Score 0

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Answer 3 : The only copies of field trip permission forms are taken on the trip.

Response 3 That is incorrect.
Records should always be kept securely using network drives, district databases, or secure areas of a school or office until they have met the required time of retention. They should be kept from unauthorized access.

Score 0

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Answer 4: None of these.

Response 4 That is correct!
Records should always be kept securely using network drives, district databases, or secure areas of a school or office until they have met the required time of retention. They should be kept from unauthorized access.

Score 1

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Records Destruction

When your records have met their required retention period, it is important to destroy or delete them in a timely manner.

District removal and destruction procedures are required when destroying paper records and other items if they:

- 1. ~~Are record copies of an item listed on the District's retention schedule.~~

OR

- 2. ~~Have personal identifiable information of a student/staff member.~~

The Records Department conducts a shredding program for this purpose. Boxes of paper records or pages with personally identifiable information must be picked up and taken to a central location where they are properly disposed of.

Items not considered District records, and not containing personal information can simply be thrown away or recycled.

Please contact the Records Center at recordsdept@cfisd.net if your campus or department needs the current form to request pick-up, or if you need detailed information about this process.

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Question 4



Think about it...

TRUE or FALSE?

I'm cleaning out my teacher cabinet. Since some of the items have student names and addresses, it's okay to put EVERYTHING in a designated shredding box including blank worksheets, trash, unused school supplies.

True/false

Answer 1: False

Response 1 That is correct!
Please use the district shredding process ONLY for records listed in our District retention schedule, or items with personally identifiable information.

Score 1

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Answer 2 : True

Response 2 That is incorrect.
Please use the district shredding process ONLY for records listed in our District retention schedule, or items with personally identifiable information.

Score 0

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Think about it...

TRUE or FALSE?

The Records Retention Schedule says I need to get rid of our department's extra duty pay records after 5 years, but I like to keep them for 15 years just in case someone has a question. That's okay, right?

True/false

Answer 1: False

Response 1 That is correct!
Keeping records longer than required limits storage space, creates difficulty in finding required records, and creates legal issues for the district.

Score 1

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Answer 2 : True

Response 2 That is incorrect.
Keeping records longer than required limits storage space, creates difficulty in finding required records, and creates legal issues for the district.

Score 0

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The Records Department is dedicated to preserving one of Cy-Fair ISD's most valuable resource - records and information. Properly managed records can result in considerable cost-savings and operational efficiency. The Records staff has expertise in legal statutes and local policies regarding records retention requirements and assists campuses/departments in developing comprehensive records management plans.

Click the links below to contact your CFISD resources for Records Management:

 Records Manager

 Records Center

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 Moodle Docs for this page