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The School District of Philadelphia
Records Center Information

Records Center Background:

The School District of Philadelphia’s Records Center, in conjunction with school and departmental record retention schedules, manages the records storage system, for all schools and administrative offices within The School District of Philadelphia.

The Records Center provides an economical and efficient system of handling the large volume of records generated by the School District of Philadelphia. They manage all School District records that are stored at an offsite warehouse which allow for more usable and free space in schools and administrative offices.

Records Center Mission:

The Records Storage Center is responsible for managing the current records storage system and ensuring that the School District meets federal, state, and local legal requirements for records storage. The office works with all schools and administrative offices within The School District of Philadelphia to transfer records to long-term storage, and to coordinate the destruction of records beyond their retention schedule.

Records Center Location:

The School District of Philadelphia Education Center
440 North Broad Street, Suite 111
Philadelphia, PA 19130

Telephone Number: 215-400-4780
Fax Number: 215-400-4782

Jill Riddick, Manager - Office of Records Management

Darnell Deans, Director - Student Enrollment & Placement
**Did You Know?**

- Records Management receives approximately 800 requests per week for records from past and current students, various state agencies and law firms. We also retrieve records for various School District Offices.

- Requests are usually related to:
  - Employers calling to verify graduation
  - Former students applying to colleges or other opportunities to further their education
  - Former students filing disability requests
  - Persons applying for government aid requiring proof of residency or birth
  - Subpoenas involving judicial circumstances.
  - Compliance with various audits.

Following the procedures set forth in this guide, will ensure future students the ability to quickly and efficiently access records they may have to refer to throughout their lives and careers. Records that have not been forwarded to the Record Center cannot be retrieved. As one can imagine, it could be frustrating to be in a situation where a facet of your life depends on the retrieval of your School District records, and they cannot be located. Your assistance is essential to ensure all student records are properly prepared and sent to storage at the appropriate time.

**Expectations of Schools and Administrative Offices**

As an employee of The School District of Philadelphia, you will likely create and/or become responsible for a large variety and volume of records. The Records Center is a resource provided by the School District to aid in keeping track of, storing and retrieving records that may be necessary and pertinent to current students, former students, faculty, administrative staff and various government agencies.

**Site-Based Records Coordinator**

Every School District location should have a person designated as the Records Coordinator. A major responsibility of the Record Coordinator is to smoothly facilitate any transition that may occur in job responsibilities.

Coordinator. A site-based Records Coordinator should:

- Keep track of every document and record that is collected by the Records Center
- Keep documentation of Records Center transactions in a centralized location.
- Be responsible for the completeness of all records
- Be responsible for the coordination of the transporting of files.
- Be familiar with the procedures for utilizing the Records Center Warehouse.
- Be familiar with the process of how to handle any requests that may arise.
- Be Responsible for ordering the proper boxes and pupil pockets.
- Be Responsible for providing your Principal or Assistant Principal with an electronic version of final records data collection and transfer & destruction forms.
Pupil Pockets

Student records are to be kept and filed in an EH-19 Pocket for Pupils Records. (Excluding special education)
EH-19’s can be ordered through Advantage with a Stock Requisition using Commodity code 61602445042

Ensuring the Completeness of Records

Collect all school files that may be with counselors, teachers, nurses and others who may have access to student records, to ensure that all relevant documents pertaining to the former students are placed in the Pupil Pocket.

Which Records to Pack

Records that should be packed and sent to the Records Center are Pupil Pockets of students who have graduated or dropped one year prior to the current date.

- Application to attend school
- Medical Records (MEH-3)
- EH-6 (or on-line equivalent)
- Class Records (EH-7)
- Attendance /Roll Sheet (CEH-14)
- Grades (including final year, High School Transcript if applicable)
- Disciplinary Records (EH-31 - Serious Incident Report)
- Copy of Birth Certificate
- Copy of Custodial Delegation Notice
- Standardized Test Scores, including SAT if available

If your only record is on the SIS, please print a copy and include it in the pupil pocket. The Record Center is mandated to physically keep records for up to 99 years.
How Long to Keep Student Records On-Site

**Elementary, Jr. High & Middle Schools**

Records for students that withdraw prior to successfully completing the highest grade at the school or that graduate and move on to a charter or out of district school are to be kept at the Philadelphia Public school until the student would reach the age of 21. Schools that feed in to a Renaissance Charter should contact the Office of Records Management for information.

*No original pocket should be sent to Charter, Alternative, Private or Out of District Schools only a copy.*

Middle Schools that receive a pocket from an elementary school, but the student does not show up, or that shows in our system as attending a Charter or Out of District School, should contact the Office of Records Management for assistance with getting the pocket to its proper location.

**High Schools**

Records for students that graduate or withdraw prior to successfully completing high school are to be held at the school for 1-year before preparing the records for archive.

High Schools that receive a pocket from a middle school, but the student does not show up, or shows in our system as attending a Charter or Out of District School, should contact the Office of Records Management for assistance with getting the pocket to its proper location.

**Alternative Schools, Charter Schools, Non-Public or Out of District Schools**

*Original pockets are Not to be sent to Alternative Schools, Charter Schools, Non-Public Schools or schools that are outside of the District.*

*Only a copy of the pupil pocket would be sent.*

*Pony does not stop at any out-of-District locations. Copies would need to be sent via US Mail, fax or email.*

Elementary, Jr. High and Middle Schools would keep the pocket on-site until the student reaches the age of 21. High Schools would keep the pocket on-site for 1-year before preparing for archive.

*Please check the system prior to preparing drop pockets for storage to ensure that the student has not re-enrolled at a school within District.*
How to Acquire Filing Boxes or New Pupil Pockets

- Records Management uses specific sized and style boxes to facilitate standardization in filing. Using the wrong size or style storage box or submitting student records in anything other than a pupil pocket may result in records being rejected by our warehouse.

Storage boxes and pupil pockets can be ordered using the Advantage Requisition System.

a. Boxes are approximately $0.97 each. Please contact the PSD warehouse to confirm

b. A box of 100 pupil pockets are approximately $35.00. Please contact the PSD warehouse to confirm

i. NO OTHER TYPES OF BOXES WILL BE ACCEPTED.

ii. On average, 35 standard Pupil Pockets or 15 Special Education files can fit in a storage box. These numbers will vary based on the thickness of each record.

How to Submit your Advantage Requisition for Student Record Boxes or for Pupil Pockets

1. Enter the Advantage System
2. Create a new SR1 requisition
3. Under “Commodity Details” enter 450WH011294 for records boxes or 61602445042 if pupil pockets are being ordered. The Object typically used is 6111
4. Enter total number of boxes you will need or the total number of pupil pockets.
5. Submit

Note: This is a 2-level approval process in Advantage. The order must receive level-2 approval for this order to successfully be received by the Materials Management Department. Ensure that the proper and respective persons are made aware of any commodity requisitions entered in Advantage.
Packing Records

- After receiving the storage boxes ordered through Advantage, employees can begin packing the storage boxes with the appropriate records.

- A Data Collection Form must be completed – All pupil pockets contained in each box must be listed on a Data Collection Sheet, they should be listed in alphabetical order by student’s last name.

- A fillable Data Collection Form can be found on the PhilaSD website under Records Management

- Your entire range of Pupil Pockets should be packed in alphabetical order by student’s last name. So your 1st box may contain last names with A’s & B’s, the 2nd box would then have C’s, 3rd box D’s and so forth.

- Two columns of records should be created within the box, starting from the column on the left using alphabetical order. (See Figure 1 below).

- Please be sure to pack the boxes in such a way that they will not bulge or tear.

Please DO NOT over pack the boxes! Leave at least 1 ½” of space to facilitate later

First Pocket (Aaron, H) - example
Last pocket (Baker, A) example

First Pocket (Aaron, H) - example

Box 1 (example) No labels needed
Preparing the Data Collection Form

Data Collection forms are found on the PhilaSD website under Records Management.

https://www.philasd.org/studentrecords/student-records-home/records-management/

Keeping your boxes in their alphabetical order. Number your boxes with temporary numbers. Your first box will be box 1. You can mark the lower right of each box with a number i.e. T-1, T-2 etc.

Fill out the top portion of the data collection sheet with your school name, 4-digit school location number, the records liaison or secretary that is preparing the records and the name of your school’s principal.

Starting with your first box (T-1), type 1 in the temporary box number column. When you start box 2, 3, 4, etc., you will provide that number. This temporarily identifies which box the student pockets on the sheets are in.

Leave the DocuSafe Box # column blank. We will provide the information needed for that column when we come to your school for the final checking of your boxes and pick up.

List your 4-digit school number

List your school name

Type the last name, First Name, any middle initial and Date of birth of each pupil pocket that is contained in your first box.

Please Note:
Please complete and save a form for each box.
School number should be in a 4 digit format
ALL dates must be in a MM/DD/YYYY format
You will keep the form in it’s Excel format.
Do not print and scan the form
We are not able to accept any handwritten forms.
Preparing the Transfer and Destruction Form

Transfer and Destruction forms can be found on the PhilaSD website under Records Management.

https://www.philasd.org/studentrecords/student-records-home/records-management/

Fill out the top portion of the Transfer sheet with your school name, 4-digit school location number, the records liaison or secretary that is preparing the records and the name of your school’s principal.

Record Series / Title
This field identifies what you are storing, for High Schools that are turning in records based on “school year”, graduation or withdrawal dates, so it might read; Pupil Pockets- grad/drop SY2014 Elementary or Middles Schools would be by “birth year” based on the year the student turned 21. An example would be; Pupil Pockets – Over 21 – BY 1996

Item Number
Item number identifies the school type
141 – Elementary School
142- Jr. High or Middle School
143- High School

DocuSafe Barcode – Please leave this column blank. We will provide That information when we come on-site

School number – Enter 4-digit school number

Range Description – Identifies the contents of the box. For example Box-1 might contain Files for students starting with the last name A. Your first pocket in the box might be for Anderson, J and your last pocket in that box might be for Aquin, D. So an example of your range description would be; Anderson J, - Aquin, D
Preparing the Transfer and Destruction Form (Cont’d)

From Date – Identifies the beginning of the year you are submitting. If they are in date of birth order, an example would for students born in 1993 would be “01/01/1993” in the “From Date “column. If you are a high school submitting drop/grads, an example for students that graduated in June of 2015 would be, 07/01/2014 as the “From Date”

To Date – Identifies the ending year of the files you are submitting. If they are in date of birth order, and example of the “to” date for students born in 1993 would be, “12/30/1993. For a high school submitting drop/grads based in school year and example for students that dropped or graduated in June of 2015 would be 06/30/2015

Destruction Date – Identifies the date that the documents can be shredded and destroyed. Student records must be physically stored for 99 years. If you are storing records for students using birth year. A destruction date example for students born in 1993 would be 12/30/2092. 99 years from 1993. If storing files for drop/grads. A destruction date example for 2015 school year drop/grads would be, 06/30/2114. 99 years from the end of the 2015 school year
Preparing Special Education Folders for Storage

Collect all special education files from counselors, teachers, nurses and others who may have access to these records, to ensure that all relevant documents pertaining to the student are in the Confidential Special Education File.
Check Sign-out log housed in the area where files are kept (in locked cabinet).

Which Records to Pack

SPECIAL EDUCATION CONFIDENTIAL FILE ORGANIZATION:
Special Education files are placed file folders or in binders with 6 sections. Documents are hole-punched and attached in each section with the most current documents on top. Organization is as follows:

Section 1: CSAP (Comprehensive Student Assistance Program)/initial referral data;
   – ACCESS letter
   – Sign-out sheet

Section 2: Communications with parent:
   – NOREPs (Notice of Recommended Educational Placement)
   – Invitations to IEP (Individualized Education Program) Conferences
   – PTEs (Permission to Evaluate)
   – PTREs (Permission to Re-evaluate)

Section 3: Documents from sources outside the school district

Section 4: Free for additional documents
   – Progress Reports
   – Attendance Sheets
   – Suspensions

Section 5: ERs (Evaluation Report)
   – Reevaluations
   – Psychological reports
   – Staff and Parent Input related to evaluations

Section 6: IEPs, Manifestation Determinations, transcript copy (if applicable)

Packing and Organizing Records

For Special Education files, records should be packed in alphabetical order by last name.

Please DO NOT over pack the boxes! Leave at least 1 ½” of space to facilitate later servicing and interfiling of records.

Do not send records for students who have graduated/dropped this Fiscal Year. Special Education records must be kept at the school for SEVEN YEARS AFTER GRAD DROP DATE.
Records Center Storage Procedure for Blue Cards

Blue Cards

- Keep the blue cards in the organization they are already in
- These blue cards should be placed in their own box. **Do not add in with pockets or folders.**
- Only a Transfer & Destruction form should be completed when preparing blue cards. **Do not index them with a data collection sheet.**
- The item number will be the same as your record type. 141 for elementary, 142 for Jr. High/Middle or 143 for High Schools.
- Record Series/Title would be “Blue Cards”
- The Range Description will be “Blue Cards” along with the date range. i.e. Blue Cards BY 1950-1974 (BY= Birth Year)
- “From” and “To” dates will be based on the range of date of birth. i.e. students born anywhere “From” 01/01/1950, “To” 12/31/1994
- The destruction date will be 99 years from the “to”date
- Please call the Record Center for additional information 215-400-4780.

BLUE CARDS DO NOT EVER GET SHREDDED OR DESTROYED. THEY ARE USED AS A LEGAL RECORD OF A STUDENT’S ATTENDANCE. ESPECIALLY WHEN PUPIL POCKETS, OR THE COMPUTER NETWORK ARE NOT AVAILABLE.
**Records Center Storage Procedure for Medical records**

Student records should be kept together in their pupil pocket and follow all FERPA, HIPPA, Local, State or Federal guidelines, (only Special Education Files are kept separate from the pupil pocket).

Nurses may have copies of medical records in their office, but not original documents.

If a nurse needs to keep records for the schools/students use, they must make a copy, and keep all original records in the student’s original pupil pocket. (When records are not married back together, crucial student information cannot be retrieved)

**Records Center Storage Procedure for Administrative Records**

This process is for Administrative offices only. If you are an office storing student records. Please see the references in this handbook regarding the procedure for Student Records.

**Determine what office records you need to store.**

Please contact your department head to confirm what documents your office needs to have stored in archives.

Place the office records/documents in authorized student records boxes.

It is imperative that you use only authorized student records boxes, as they are constructed to with stand our vendors storage practices.

We do not accept records in bankers boxes, copy paper boxes or any other unauthorized box.

**Prepare a Transfer & Destruction From**


Due to the variations of administrative record types. The data on the Transfer and Destruction form may vary.

Contact The Office of Records Management with any questions.
**Schools Closing or Transitioning to Become a Charter School**

In the event that a school is closing, there are several steps that must be taken to ensure that all records are properly filed away and stored. It is imperative that all steps are followed carefully because these records will be referenced for many years to come.

**Collect and Organize All Available Records**

Once a final decision is made regarding your school's closure or transition to become a Charter School. The site coordinator should search the entire school and collect any and all records found.

Organize and consolidate the found documents and files following the procedures listed in this handbook for their respective type. Using the data collection and transfer and destruction sheets, begin preparing the records that will be stored.

Contact the Office of Records Management with any questions.

**Records for Active Students who are Transitioning to New Schools**

**Records for students that are transitioning on to a School District of Philadelphia school**
Please PONY their current records to the new Philadelphia Public school they are attending. Please place the name of the Philadelphia Public School that they will be attending and that school's number on the pony envelope/s.

Please ensure the envelope/s are securely sealed.

**For students that will transition to a Charter School, Alternative Program, Out of the District or other non-public school**

Please make a copy of their student file or special education records and send them via US Mail, fax or email. Do not mail or send to any Charter, Alternative, Out of the District or any other non-Philadelphia Public school the original pupil pocket. The Office of Records Management will pick up the original pocket of those students. Do not put pockets or documents to Charter Schools, Alternative Programs or schools, Out of the District or any other non-public school/s in Pony. Pony does not visit locations outside of our District. Never send an original pocket to an Alternative, Charter or out of District School.
Schools Closing or Transitioning to Become a Charter School (Cont’d)

Records of Students That Have Graduated Or Withdrawn
Records for students that have graduated 12th grade, students that have withdrawn from your school or students that have Not provided information regarding the name of the school they will transition into after your schools permanent closure. Will be organized and boxed in the manner described for records storage preparation.

DO NOT remove any contents from the Files or Pupil Pockets

Please call Student Records with any questions (215) 400-4780
**How to Schedule a Records Pick-up**

After completing the Excel Worksheet Data Collection and/or Transfer and Destruction forms for your department. Please email the typed Excel worksheets to:

recordsmanagement@philasd.org

Once the forms are received. We will review your forms and will contact you with any needed changes and attempt to schedule a date for records pick up.

** Please Note: On the date of pick up you or a records contact will need to be available to make any needed final corrections to the excel worksheet/s and to add the vendors box number to the sheets that we will provide on the day of pick up.

You will need have access to a computer and to your original excel worksheets.

**How to Request Records from Archive**

Locate your final copies of the data collection or transfer & destruction forms that you have on file that correspond with the documents or student file/s that you wish to retrieve from archive.

Make note of the “Docusafe Barcode” number/s of the record you would like to retrieve.

Contact The Office of Records Management and provide the Docusafe barcode number/s.

Please allow 3-5 business days for receipt of the records box or file.
FAQ’s

1. Once completed all forms must be submitted via email to the Office of Records Management in the original excel format. Please do not print or scan and email the forms. We can not accept PDF’s.

2. Each box should be listed on a separate data collection sheet.

3. If you are an office within the Education Center, please list your office name as the “school” name and your managers name as the Principal’s name.

4. Student Records/Pupil pockets are to be kept 99 years. The destruction date would be 99 years from the graduation/drop year.

5. Please list all date fields in MM/DD/YYYY format.

6. Please leave the “Docusafe Barcode” field blank on all forms. This number will be provided once the Office of Records Management comes on site to check your boxes and forms for accuracy.

7. Records can only be prepared for storage in the student record boxes that can be ordered and received through the School District warehouse office. See page 6.

8. Please do Not affix any labels or forms on the outside of the boxes. Outside labeling is no longer required by the school or offices. The Office of Records Management will provide any/all labeling at the time of inspection of your records and pick up.

9. Please note there is a separate data collection form for Special Education records.

10. Student records preparation requires that a transfer and destruction form be completed in addition to the data collection form. In the case of student records, the data collection form provides the specific contents of each box to be archived. The transfer and destruction form provides the “range” of the contents within each box. In order to maintain accuracy, both forms are necessary and vital.
How to Contact Student Records – Records Center

The School District of Philadelphia office of Student Records is located at,

The School District of Philadelphia Education Center
440 North Broad Street, Suite 111
Philadelphia, PA 19130

The most efficient way to contact The Office of Records Management is via email at:

recordsmanagement@philasd.org

You may also reach out to us by phone at:

215-400-4780

The School District of Philadelphia Education Center
440 North Broad Street, Suite 111
Philadelphia, PA 19130

Telephone Number: 215-400-4780-option 5
Fax Number: 215-400-4782

Jill Riddick, Manager Student Records

Darnell Deans, Director Student Enrollment & Placement