



THE SCHOOL DISTRICT OF  
PHILADELPHIA

# QUICK GUIDE TO MANAGING STUDENT



Records

Office of Records Management/Student Records  
440 N. Broad St., Suite 111  
Philadelphia, PA 19130  
Jill Riddick – Manager  
Darnell Deans – Director, Student Enrollment & Placement

Revised 05.28.2019

# Table of Contents

## **Overview**

Student Records – Things to Remember .....	2
How to Order Pupil Pockets .....	2
How to Order Student Records Boxes .....	2
How Long to Keep Records On-Site - Elementary/Middle Schools .....	3
How Long to Keep Records On-Site – High Schools .....	3
Out of District Schools – Alternative Programs, Charter, Catholic, Parochial & Out of District .....	4
Blue Cards .....	4

## **Records Preparation- Pupil Pockets**

How to properly Place Pupil Pockets in Boxes .....	5
Completing a Data Collection Form .....	5
Completing a Transfer & Destruction Form .....	5
Requesting a Records Pick-up .....	8
What to expect during the Records Pick-up .....	8

## **Records Preparation- Special Education**

How Long to Keep Records On-Site .....	6
How to Order Boxes .....	6
How to Properly Place Special Education Folders in Boxes .....	7
Completing a Data Collection – Special Education form .....	7
Completing a Transfer & Destruction Form .....	7
Requesting a Records Pick-up .....	8
What to Expect During the Records Pick-up .....	8

## **Office Records**

Preparing Office Records for Archive .....	10
--	----

## **ALL Records**

End-Of-Year Transfer of Records .....	9
What to Expect during a records pick up .....	8
Contacting the Office of Records Management .....	10

## **Student Records Requests**

Requesting Student Records .....	11
Requesting Closed Charter School Records .....	11
Contacting Student Records .....	12

## **Student Records – Things to Remember**

Student records are **Never** to be destroyed or thrown away by a school.

Records should **NOT** be sent via Pony to 440. Records are to be turned in for storage through a scheduled records pick-up by the Office of Records Management.

School District of Philadelphia student records should Never be mailed or put in Pony to any Charter School, Alternative Program, Catholic, Private or any other non- School District of Philadelphia School. **Only a copy of the record would be sent. The original is to be held by the School District of Philadelphia School.**

Please contact Records Management for guidance  
recordsmanagement@philasd.org

## **Pupil Pockets**

Student records are to be kept and filed in an EH-19 Pocket for Pupils Records.

(Excluding special education)

EH-19's are to be ordered through the ERP Finance Oracle Portal. To obtain information on using that application please contact the ERP Finance by emailing erppd@philasd.org.

## **Ordering Student Records Boxes for Storage Preparation**

The Office of 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.

Boxes are to be ordered through the ERP Finance Oracle Portal. To obtain information on using that application please contact the ERP Finance by emailing erppd@philasd.org.

## **How Long to Keep Student Records On-Site**

### **Elementary & Middle Schools**

Records for students that withdraw prior to successfully completing the highest grade at the respective school should be kept at the school until the student would reach the age of 21. Records for students that successfully complete the highest grade at the school are to be sent to the next Philadelphia Public School that the student will be attending.

**No original pocket should be sent to Charter, Alternative, Private or Out of District Schools. If a student is not attending a Philadelphia School District School, schools should wait for a formal request for records from the receiving school and provide a copy to the requesting school. The pocket should remain in the last school of record.**

Middle Schools that receive a pocket from an elementary school, but the student does not show up, or shows in our system as attending a Charter or Out of District School, should enter and then exit the student in our system. This will maintain accurate electronic tracking of the pocket.

Once completed, the pocket should be kept on-site at the school until the student reaches the age of 21 or until another Philadelphia Public School requests the pocket if the student re-enters the District. This allows other schools within the School District of Philadelphia to locate the pocket and create a tracking for when the pocket is archived.

### **High Schools**

Records for students that graduate or students who 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 enter and then exit the student in our system. This will allow accurate electronic tracking of the pocket.

The pocket would then be held on-site at the school for 1-year. This allows other schools within the School District of Philadelphia to locate the pocket and create a tracking for when the pocket is archived.

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

*Original Pupil 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.*

\*\* If a drop/graduated student transitions on to a school outside of School District of Philadelphia, Elementary 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.

**Please check the system prior to preparing drop pockets for storage to ensure that the student has not re-enrolled at a school within another School District of Philadelphia school.**

## **Blue Cards**

With the transition to the new Infinite Campus system. It is no longer possible to produce Blue Cards. However any Historic Blue Cards that you have should now be turned in for archiving.

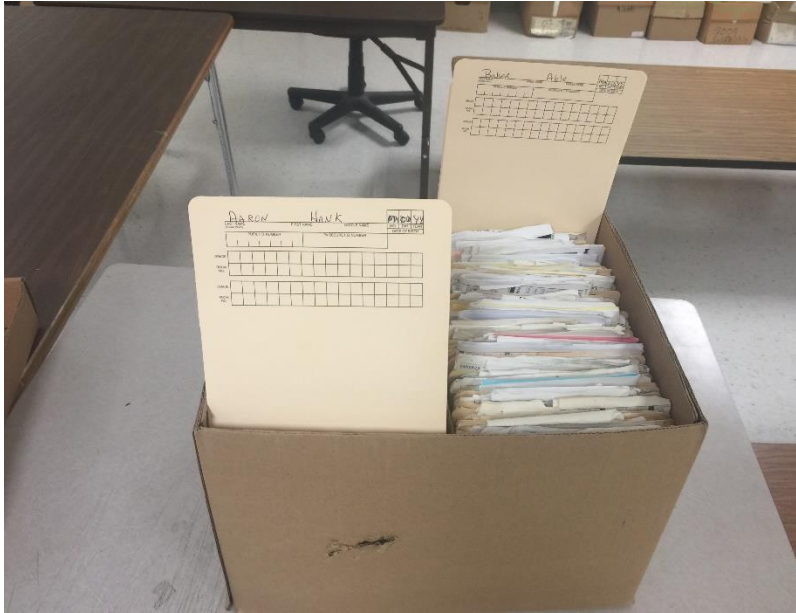
1. If the Blue Cards are sorted alphabetically. Try to maintain some order when packing.
2. These blue cards should be filed in their own records box. Do not add with pockets or folders. A student records box must be used.
3. Only a Transfer & Destruction form will be completed when preparing blue cards. **Do not index them with a data collection sheet.**
4. The item number will be the same as your record type. 141 for elementary, 142 for Middle Schools or 143 for High Schools.
5. Record Series/Title would be "Blue Cards"
6. The Range Description will be "Blue Cards" along with the date range. i.e. Blue Cards BY 1950-1974 – if possible
7. "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
8. The destruction date will be 99 years from the "to" date
9. Please call the Record Center for additional information  
recordsmanagement@philasd.org

**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 Preparation

Arrange the files in A-Z order

Place files in Student Records boxes as shown below first pocket in left front/ last in right rear. Please make note in the picture below that the handle holes are on the sides of the box. Please be sure to pack the boxes in such a way that they will not bulge or tear.



Open a “**DATA COLLECTION**” form from the Records Management website.

<http://webgui.phila.k12.pa.us/offices/s/student-placement/records-management/records-center>

Type in the information for each student in the box and then save the Excel worksheet to your documents or desktop. This will be done for each box of records that you are preparing. Hand written forms or printed scanned documents cannot be accepted.

After all boxes have been data collected. Complete a “**TRANSFER & DESTRUCTION**” form. This form can be found on the records management website.

<http://webgui.phila.k12.pa.us/offices/s/student-placement/records-management/records-center>

**Record Series Title** – identifies the type of record Pupil Pockets SY(school year- for High Schools or BY for Birth Year).

**Item number – 143 denotes high School**

**Item number – 142 denotes Middle/Jr High**

**Item number – 141 denotes Elementary School**

**From Date** – Drop/grad year beginning School Year, i.e. 07/01/2016 or for Elementary Middle Schools. Year of the students reaching age 21, i.e. 01/01/1996

## Records Preparation Cont'd

**To Date** – Drop/grad year School Year end, i.e. 06/30/2017 or for Elementary and Middle Schools. The end of the birth year the student turned 21, i.e. 12/30/1996.

**Date of Destruction** – 99 Years from what you listed as the “To” date.

## Special Education Records Preparation

As with all student records, special education records are **Never** to be destroyed or thrown away by a school. Special education records should **NOT** be sent via Pony to 440.

Special Education records are turned in for storage through a scheduled records pick-up by the Office of Records Management.

School District of Philadelphia student records should **Never** be mailed or put in Pony to any Charter School, Alternative Program, Catholic, Private or any other non- School District of Philadelphia School. **Only a copy of the record is to be sent. The original is held by the School District of Philadelphia School.**

Please contact Records Management for guidance  
recordsmanagement@philasd.org

## How Long Do I Keep Special Education Records On-Site?

Special Education Records should be kept at the school until the student would reach the age of 27. This allows other schools and entities the ability to easily access copies of file for services that the student may be receiving.

**\*Please note: Schools that feed in to a Renaissance Charter school – Should contact the Office of Records Management at [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org) for on-site requirements.**

## Ordering Special Education Records Boxes for Storage Preparation

The Office of Records Management uses specific sized and style boxes to facilitate standardization in filing. Using the wrong size or style storage box or submitting special education records mixed with any other record type may result in records being rejected. Boxes are to be ordered through the ERP Finance Oracle Portal. To obtain information on using that application please contact the ERP Finance by emailing [erppd@philasd.org](mailto:erppd@philasd.org).

## Special Education Records Preparation (Cont'd)

Once you have received the boxes from Facilities. You will then file the records in the boxes. Please keep your entire group of records in one big A-to-Z order. For example the first box in your group would contain any A last names and the very last box in your group would hold any Z last names.

Depending on the size of your special education files you may need to place them length wise in the box or if they are shorter files. They would be placed in the box facing the handles. (See below examples).



*Note with the standard size folders the file will go across the handles of the box. With the longer folders, see example - they are placed facing the front of the box*

### Preparing the Forms

Open a “**DATA COLLECTION-Special Education Version**” form from the Records Management website.

<http://webgui.phila.k12.pa.us/offices/s/student-placement/records-management/records-center>

Type in the information for each student within the box and then save the Excel worksheet to your documents or desktop. This will be done for each box of records that you are preparing.

**Hand written forms or printed scanned documents can not be accepted.**

After all boxes have been data collected. Complete a “**TRANSFER & DESTRUCTION**” form. This form can also be found on the records management website.

<http://webgui.phila.k12.pa.us/offices/s/student-placement/records-management/records-center>



## **Special Education Records Preparation (Cont'd)**

**Record Series Title** – identifies the type of record Special Education BY(BY would be the indicator for the Birth Year/s that you are working).

**Item number** – 201 denotes Special Education

## **Scheduling a Records Pick Up – All Record Types**

Once you have completed the typing of the form/s. Please send an email to [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

Please attach each excel worksheet for each box of your data collection and the Excel worksheet of your transfer and destruction form/s.

We will look over the forms. Give feedback for any needed adjustments and schedule your records pick up.

## **What Happens When Records Comes Out to Pick-up The Records? – All Record Types**

You will need to be available and you must have computer access to the excel worksheets. Records Management will cross check the pockets with the information on the worksheets, provide any corrections that will need to be completed at the time of pick up, and provide you with the DOCUSAFE barcode to be added to the form at the time of pick up.

Once these edits have been completed. You will again email the form/s to [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

Once these steps are completed we will remove the boxes from your school/site.

## End of School Year Record Transfer Preparation

As a part of the annual school transition process, you are asked to ensure all pupil pockets are ready to be delivered to the receiving schools of each student promoted or attending a new school in September.

Please follow the procedure below to complete the Pupil Pocket Preparation Process.

1. Determine where each student will attend school during the upcoming school year.
2. Sort departing students' pupil pockets by receiving PhilaSD school and organize pupil pockets in alphabetical order by last name.
3. Once divided and organized, create a master list of pupil pockets to be placed with each receiving school  
(See data collection form for records transfer-found on the Records Management website).
4. Pupil pockets should be packaged in standard 10x13 *pony* envelope(s). Insert the master list copy in each pony envelope/student records box. Please keep copy of all forms for reference.
5. For security purposes, securely tape closed each respective envelope.
6. Once pupil pockets are packaged, please complete and affix the delivery receipt to the envelope. (The delivery receipt form can be found on the Records Management website)
7. Pupil pockets will be picked up via the pony system on your school's respective pick up day. (There is usually increased PONY pick up as end of school year nears.)

**Pupil pockets for students attending alternative programs, charter, private and parochial schools in next school year should be kept at your school. Only copies of the pocket and records are to be provided to these entities.** You may also direct those schools to the Office of Records Management for assistance.

Email: [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

**Special Education files** are typically delivered to the receiving school by the SEL. Please contact the Office of Specialized Services for more detailed instruction. Please note that the special education files for students attending alternative programs, charter, private and parochial schools should be kept at your school. Only copies of the file would be provided to those entities. **Special Education files for students attending alternative programs, charter, private and parochial schools in next school year should be kept at your school. Only copies of the file and records are to be provided to these entities.** You may also direct those schools to the Office of Records Management for assistance.

Email: [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

## **Office Records Preparation**

The first step in your preparation process would be to organize your files in a logical order. This will allow you to easily track or request that we call in the file/s or documents from archive.

You then would put the files in storage boxes.

The Office of Records Management uses specific sized and style boxes to facilitate standardization in filing. Using the wrong size or style storage box may result in the records being rejected.

Boxes are to be ordered through the ERP Finance Oracle Portal. To obtain information on using that application please contact the ERP Finance by emailing [erppd@philasd.org](mailto:erppd@philasd.org).

The final step would be to complete a records Transfer & Destruction form. Please contact the Office of Records Management for direction with completing the form as the direction may vary depending on the record type.

## **Contacting the Office of Records Management**

The Office of Records Management 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 Records Management is via email at:

[recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

Jill Riddick, Manager Student Records  
Darnell Deans, Director Student Enrollment & Placement

Information regarding the preparation of records for archive can be obtained by visiting our website,

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

or

The Office of Records Management website can also be accessed by following our website path:

Philasd.org

Directory, Office Directory,

Records Management

And clicking the green type under Schools/Administrative Offices

## **Requesting Student Records – Adult Former Student Records**

All requests for the records of students that are now adults and have graduated or withdrawn from the School District of Philadelphia are placed using the Student Records website, <https://www.philasd.org/studentrecords/student-records-home/student-records/>

Please direct the person making the inquiry to  
Philasd.org

Then they will follow the link for “Students” (including businesses),  
And then click the link for “Student Records Requests”.

### **Requests from the Social Security Administration can be directed to our Fax: 215-400-4782**

Attorneys representing former students in Social Security claims would be directed to our student records website or to the office of Student Records telephone number.

## **Requesting Closed Charter School Records**

School District of Philadelphia Schools may request the closed charter school records of active students that are attending their school by contacting the Office of Student Records via email at [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

Out of District Schools & entities may request the closed charter school records of active students that are attending their school by email a formal request for records to the Office of Student Records, [recordsmanagement@philasd.org](mailto:recordsmanagement@philasd.org)

Adult Former students of Charter schools that are now closed permanently, would be directed to the Student Records Website.

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

## **Contacting the Office of Student Records (Student Records Requests)**

Inquiries from adult former students, background check/verification companies, colleges/universities, government and legal entities seeking the records of former students are to be directed to the Office of Student Records.

Record types offered include, transcript (official and student copy, verification of graduation, replacement diploma, certification of birth date, copy of student file and copy of special education file.

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 Student Records is via email at:  
[records-request@philasd.org](mailto:records-request@philasd.org)

Jill Riddick, Manager Student Records  
Darnell Deans, Director Student Enrollment & Placement