

SPECIAL EDUCATION HANDBOOK

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The Referral Process

General Overview

The Referral Section of the Special Education Handbook contains both information and required forms for notification to parents, services for students provided by district specialists including Occupational Therapists (OT), Physical Therapists (PT), Speech Language Pathologists (SLP), Autism support and post-high transition services. You will also find information on special services and referrals. Also included are processes and forms for outside services through Columbia Regional Program and County Developmental Disabilities Services.

Columbia Regional

Columbia Regional Program (CRP) assists classroom teachers and their schools by providing services to children with low incidence disabilities. CRP provides specialized educational support for children with hearing impairments, vision impairments, severe orthopedic impairments (SOI) and deaf/blindness. Learn more about CRP's services at:

<http://www.crporegon.org/>

Refer a family to CRP when you suspect a student may have one of the listed disabilities and need assistance with the initial evaluation, or when a student moves into Corbett School District who was CRP eligible in their former district. A NEW referral needs to be filled out for services to continue at Corbett. If the student was eligible for Autism Spectrum Disorder (ASD), these services are provided through Columbia Gorge ESD as it is no longer considered a low incident disability.

Multnomah Education Service District

The mission of Multnomah Education Service District (MESD) is to support local school districts and share in providing a quality education for the children and families of our communities. MESD works as a team dedicated to enhancing the learning of the communities' children by designing and delivering services responsive to family and component district needs. MESD strives to demonstrate leadership, wise utilization of resources, cooperative relationships with component districts and other agencies and a commitment to being a learning organization.

Corbett School District contracts the following services through MESD: Occupational Therapy (OT), Physical Therapy (PT), Speech Language Pathology (SLP), School Psychology, and Health Services.

Consent, Evaluation, and Assessment

The Consent Section of the Special Education Handbook provides both information and forms related to Child Find and the 60 day timeline rule for evaluations, written descriptions of all evaluation and assessment tools, copies of both the consent form used for student observations and the Prior Notice & Consent for Evaluation form.

Evaluation and Assessment Tools

Special Education law requires that parents receive written descriptions of all evaluation and assessment tools when asked to give their consent for an evaluation. Attached are copies of these descriptions. Fill out the appropriate descriptions and provide these to parents at the time of consent.

The Student Services Handbook contains additional basic information regarding IEPs in the Reference Documents section.

Consent and Release

Written descriptions of all evaluation and assessment tools and the Prior Notice & Consent for Evaluation form, and release forms can be found in *Reference Documents*. Please note that consent is needed for initial screening from an SLP and/or an OT, and also for a Functional Behavior Assessment (FBA).

Child Find

Each year school districts in Oregon are required to report to the Oregon Department of Education the number of students the district evaluated and determined eligible/ineligible under the IDEA for the first time. OAR 581-015-2110 (5),(a), states that an evaluation must be completed within 60 school days from written parent consent to the date of the meeting to consider eligibility. When we are unable to complete the evaluation within 60 school days for the following reasons, we are found by ODE to be out of compliance:

- Parent/Guardian did not attend the eligibility meeting
- Initial testing results indicated need for additional testing not identified
- Delay by doctor or personnel
- Delay by program/district evaluation staff

Child Find info must be submitted to Holly Dearixon (see *Contact Information*).

Corbett School District 39's adopted policies on Child Find Identification Procedures and efforts are as follows:

1. Public awareness. District child find activities involve local media resources and direct contact activities, such as presentations at

community meetings, business group meetings, services agencies or advocacy organizations.

- a. The district provides information about special education services in the district and the district's special education referral process to public and private facilities and public charter schools located in the district, including day care centers, homeless shelters, group homes, county jails, hospitals, medical officer and other facilities that serve children birth to 21 years old.
 - b. The district provides information about special education services and how to make a referral to any migrant education programs operating in the district.
2. Notice of confidentiality. Before any major child find activity, the district publishes notice in newspapers or other media, or both, informing parents that confidentiality requirements apply to these activities. Circulation for this notice must be adequate to inform parents within the district's jurisdiction.
3. Staff awareness. The district ensures that staff are knowledgeable of the characteristics of disabilities and the referral procedures for students, including preschool children, suspected of having disabilities.
4. Communication to parents. District staff shall inform parents about the availability of special education services in the district and provide them with information about initiating referral for special education evaluation, including the information about early intervention/early childhood special education services (EI/ECSE) and the designated referral and evaluation agencies with which to district collaborates.
5. Private School Children with Disabilities:
 - i. The district's child find system applies to children who are residents enrolled in a parentally placed private school.
 - ii. Since there are no private schools within district boundaries, Corbett school district will provide eligibility information to the district within the private school's boundaries. That district is responsible for implementation of IEP. If a student is eligible for speech services, a parent may partially enroll them in Corbett in order to receive those services.

Eligibility

Eligibility Categories

Filing Code	Disabling Condition
10	Intellectual Disability
20	Hearing Impairment
40	Vision Impairment
43	Deaf/Blind
50	Communication
60	Emotional Disturbance
70	Orthopedic Impairment
74	Traumatic Brain Injury
80	Other Health Impairment
82	Autism Spectrum Disorders
90	Learning Disability

Initial Eligibility

The Initial Eligibility Section of the Special Education Handbook provides both information and forms used when planning and completing and initial evaluation for special education. Some forms are required and some forms can be used to guide teams through the process.

Forms required for eligibility can be found in the *Reference Documents* section.

Medical Statement

A Medical Statement may be required for Initial Evaluations for the following eligibility categories:

- Intellectual Disability (10)
- Hearing Impairment (20)
- Vision Impairment (40)
- Deaf / Blindness (43)
- Communication Disorder (Required for a Voice Disorder, and in some other cases when physical factors could contribute to a Speech / Language problem. Consult with Evaluation Planning team to determine if a Medical Statement is necessary; 50)
- Emotional Disturbance (60)
- Orthopedic Impairment (70)
- Traumatic Brain Injury (74)
- Other Health Impairment (80)
- Autism Spectrum Disorder (82)
- Specific Learning Disability (90)

If there is already a Medical Statement in the file for re-evaluations, the team needs to review it and determine whether or not it is adequate to use for eligibility determination. Some things to consider when making this determination are the permanence of the student's condition (conditions acquired at birth such as CP do not change and a new Medical Statement may not be necessary), the time lapsed between the Medical Statement in the file and the present eligibility determination date, the accuracy of the information on the Medical Statement, etc.

When a team determines that a *Medical Statement* is needed as part of an evaluation, gain consent from the parent.

As soon as *Consent for Evaluation* is signed:

1. Make sure the parent/guardian has signed an "Authorization to Use and/or Disclose Educational and Protected Health Information" form (website/handbook in Misc. section). If they have not, have them sign one right away.
2. Create your Medical Statement Intro letter using the following link: [Medical Statement Intro Letter](#)
3. Prepare a blank Medical Statement by checking boxes next to the area that the Physician or Nurse Practitioner needs to fill out. This will vary by eligibility category (see above for more information).
4. Attach Intro letter, partially filled out Medical Statement form, and Authorization to Use and/or Disclose Educational and Protected Health Information form together. Mail or Fax the packet directly to the Physician / Clinic. You can also send the packet with the parent if they are going to take the student to the doctor for an evaluation / appointment. The Physician can mail or fax the statement back to you, or they can return it to the parent, who can give it back to you.

If Medical Statement is unavailable before the Eligibility Meeting:

1. On an initial evaluation: Document attempts to procure the Medical Statement. Contact District Office on how to proceed with completing the eligibility *within the 60 day timeline* with no statement.
2. On a re-evaluation where there is a previous Medical Statement in the file: consult the process for Change in Evaluation Planning to change the need for a new medical statement if possible. Use the old Medical Statement if it is still relevant and conditions have not changed, and complete the eligibility *within the 60 day timeline*.
3. On a re-evaluation where there is no record of a Medical Statement: Document attempts to procure a new Medical Statement. Contact District Office on how to proceed with completing the eligibility *within the 60 day timeline*.

Re-Evaluation

The Re-evaluation Section of the Special Education Handbook provides both information and forms used when planning and completing a re-evaluation for special education services. Some forms are required and some forms can be used to guide teams through the process. Re-Evaluation forms can be found in the *Reference Documents* section.

Not Eligible or Dismissal from Special Education

This Section of the Special Education Handbook provides guidance for teams who are working with a student who may no longer meet eligibility criteria for receiving special education services. The Special Education Dismissal and Process Checklist can be found in the *Reference Documents* section.

Parent Revocation of Consent for Services

Parent Revocation of Consent for Services forms can be found in the *Reference Documents* section.

Stand Ready

The Stand Ready samples are available in the *Reference Documents* section.

Meetings

Please utilize all agendas and checklists to prepare for any meeting. These can be found in the *Reference Documents* section.

Overview

Meetings should be planned in conjunction with vital team players whenever possible. A meeting notice should be sent at least 10 days before the meeting. When the meeting is planned at the last minute and essential members are in agreement to meet on a certain date, it is reasonable to send the notice as soon as the meeting is set.

Parents, student when 16 or older always, student when under 16 sometimes, general education teachers, other service providers (SLP, OT, PT, AT) whenever possible, should be invited to the meeting.

Arrange the meeting via district interpreters for non-English speaking families. When possible, send notice in family's native language by using ODE's forms at the link:

<http://www.ode.state.or.us/search/page/?id=817>

Always attach an English form to any form in another language.

Use the SpED Team Meeting Notes Form to take notes at all meetings. Attach more notes to that form if needed. The Team Meeting Notes Form is available in the *Reference Documents* section.

Notice and Summary

The Meeting Notice forms are available in the *Reference Documents* section.

IEP

Oregon Standard IEP Information

The Oregon Department of Education website states that:

IDEA 2004, reauthorized by Congress and signed by President Bush in December 2004, went into effect in July 2005. This reauthorization included changes to the content of student individualized education programs (IEPs). The Code of Federal Regulations was subsequently revised and went into effect in August 2006.

The Oregon Standard IEP, which includes a Part A: Guidelines for Completion, and a Part B: Oregon Standard IEP form has been revised to comply with IDEA 2004 and the federal regulations. Revisions also include additional enhancements to the both the IEP guidelines and form. ODE now provides a standard IEP for students age 15 or younger when the IEP is in effect; and a standard IEP for students age 16 and older when the IEP is in effect (for students of transition age).

All IEPs developed on or after July 1, 2007 must be developed using one of the revised Oregon Standard IEP's or an ODE approved alternate (ORS 343.151).

Under Oregon Administrative Rules (OAR) 581-015-2215, all districts and ESDs in Oregon must use the Oregon Standard IEP form, unless they have applied for and been granted approval for use of an alternate IEP form by the Oregon Department of Education (ODE). Consult the [Guidelines for Alternate IEP Form](#) for details and timelines for the 2013-2014 submission and approval process. The following changes to the Standard IEP form do NOT require ODE approval as an alternate IEP form:

- Adding items to the demographic information (e.g. the addition of disability codes, parent address, or similar items);
- Variance in the form layout (e.g. more spacing, additional lines, varying from landscape to portrait)

Basic Information: IEP Meetings

At least every 365 days on the day before the day it is due (Example: If the IEP is written September 7, 2013, the next IEP meeting should be held on or before September 6, 2014). The meeting should try to be held during the contract day in order to allow all professionals to attend, unless special arrangements have been made. Remember to take into account the parent's and other professional's schedules. We will make sure to make arrangements before, after, and during the school day to have the meeting.

Basic Information: Required Attendance

At least 2 professionals and a parent should attend the IEP meeting by law. Professionals include: Speech and Language Pathologist, School Psychologist, Autism Specialist, General Education Teacher, Administrator, Special Education Teachers, Related Service Providers, Transition Specialist. A General Education Teacher MUST be present at the meeting if the student has any or may have any involvement with the general education curriculum during the IEP period. Special arrangements can be made in some cases (see below). The meeting can be held without the parent, as long as a minimum of 3 attempts to contact the parent have been made and documented. (Example of 3 contacts: Phone call to schedule the meeting, meeting notice sent, and a reminder call in advance of the meeting. Make sure these are clearly documented on a contact log or directly on the meeting notice.)

A District Representative is someone who has the authority allocate services. Administrators are District Representatives. Special Education Providers (Speech and Language Pathologists and Special Education Teachers) can also serve as District Representatives if given permission by the Director of Student Services.

What if a general education teacher says they will attend but does not show up for the meeting?

Attempt to contact that teacher or another general education teacher. If attempts fail and you have written input from at least one of the student's teachers, present the feedback and follow the steps listed above around using the Written Agreement Between the Parent and the District. If the parent does not wish to hold the IEP meeting without a general education teacher present, reconvene at a later date.

It is important to schedule IEPs before they are due and allow yourself adequate time in case such a situation should arise.

Supplementary Services, Aides, Modifications and Information

Supplementary aids and services is a very broad category of aids, services, and other supports that are provided in regular education classes, other education-related settings, and in extracurricular and nonacademic settings, to enable children with disabilities to be educated with non-disabled children to the maximum extent appropriate. Examples could include, but are not limited to:

- *Supports to address environmental needs* (preferential seating, planned seating for bus/classroom/lunch/auditorium/other locations, altered physical room arrangement, etc.).
- *Levels of staff support needed* (access to educational assistance in general education classroom, consultation, stop-in support, classroom companion, one-on-one assistance, type of personnel support, behavior specialist, health care assistant, instructional support assistant, etc.).
- *Child's specialized equipment needs* (wheelchair, computer, software, voice synthesizer, augmentative communication device, assistive technology devices, utensils/cups/plates, restroom equipment, sensory tools, etc.).
- *Pacing of instruction needed* (breaks, more time, home set of materials, assignments broken into chunks, etc.).
- *Presentation of subject matter needed* (taped lectures, sign language, primary language, visual supports paired reading and writing, etc.).
- *Materials needed* (scanned tests and notes into computer, shared note-taking, large print or Braille, assistive technology, manipulatives, access to calculator, notes for class ahead of time, etc.).
- *Self-management and/or follow-through needed* (calendars, visual calendar, teach study skills, etc.).
- *Testing adaptations needed* (read test to child, modify format, extend time, break into short work periods, etc.).
- *Behavioral/social supports needed* (case manager present at disciplinary actions, Behavior Support Plan, frequent breaks, adult to check in each morning, etc.).
- *Social interaction support needed* (provide Circle of Friends, access to peer buddy, use cooperative learning groups, teach social skills, etc.).

Accommodations vs. Modifications

Determining what is an accommodation vs. a modification requires the teacher to analyze the core standards and requirements of their course. Teachers should be able to identify the essential learning and skills students need to demonstrate for proficiency. Once this is established, ask if current student supports allow demonstration of content mastery (accommodation), or if the supports modify the actual content knowledge expectations (modification).

Accommodations are changes made to the educational environment, procedures or curriculum that allows a student to work with or around a disability. Content and essential skills remain the same. *Modifications* are changes made to the content and performance expectations.

Specially Designed Instruction

Specially Designed Instruction (SDI) means adapting, as appropriate to the needs of an eligible child under this part, the content, methodology, or delivery of instruction(OAR 581-015-2000(34):

1. To address the unique needs of the child that result from the child's disability; and
2. To ensure access of the child to the general curriculum, so that he or she can meet the educational standards within the jurisdiction of the public agency that apply to all children.

The tie between SDI and service minutes, Corbett School District must have sufficient minutes of specially designed instruction in order to reasonably ensure that the student will make progress toward his IEP goals within the calendar year of the IEP. The goals and how many minutes per week the student needs instruction toward those goals in order to make progress on them - is what drives the calculation of service time. All instruction toward the IEP goals is part of SDI - other time like repetition, reinforcement, re-teaching, an opportunity for independent work time, etc, can be accommodations that non-sped staff provide, but the actual instruction toward the goals is always SDI, and thus must always be provided by - or under the supervision and direction of - a sped teacher.

IEP Process Checklist and Meeting Agendas

IEP Process Checklists and Meeting Agenda forms can be found in the *Reference Documents* section.

Extended School Year (ESY)

This section of the Special Education Handbook provides both guidance on the process for determining if special education students are eligible for Extended School Year (ESY) services and the forms required for use in the district. ESY forms can be found in the *Reference Documents: Extended School Year* section.

State Testing: Extended Assessments

In this section of the Special Education Handbook, you will find a description of the Extended Assessment and an attached document providing guidance when determining if an extended assessment is the appropriate assessment for a student in special education.

What is the Extended Assessment?

Oregon's Extended Assessments is the alternative statewide assessment and is designed specifically for students with the most significant cognitive disabilities. The decision to administer Oregon's Extended Assessment (the alternate statewide assessment) can only be made by the student's IEP team--including the

parent (see decision-making guidelines). Because the Extended Assessments are based on alternatives achievement standards with content that is reduced in depth, breadth, and complexity, test results from these assessments are not comparable to results achieved on the state's general assessment, in spite of the similarity in performance category names: does not meet, nearly meets, meets, and exceeds.

Up to 1% of the students from the entire school district who are found proficient ("Meets" and/or "Exceeds") on the Extended Assessment can count toward state AYP performance reports.

To administer the Extend Assessment you must become a Qualified Assessor (QA). A QA will receive training and must pass a proficiency exam of their skills and knowledge related to the Extended Assessments. QA status must be updated annually.

In addition, all QAs who will administer Extended Assessments must receive security training and have a signed Test Administrator Assurance of Test Security form and have it on file at the District Office, valid for the current school year. QAs must renew this form annually upon completion of the security training for OAKS testing.

For more information regarding Oregon's extended assessments the Extended Assessment Administration Manual, assessment updates, and alternate achievement standards for PLAAFP reporting, please visit the Oregon Department of Education website at:

<http://www.ode.state.or.us/search/page/?id=2691>

The Extended Assessment scores are not released to the district until the summer after the test was administered. The test scores can be found in the standard test scores reported in Synergy, where other OAKs scores are posted.

Oregon Statewide Assessment Decision-Making Guidelines for students with IEP's can be found in the *Reference Documents: Extended School Year* section.

Written Agreement Between Parents and District

The Written Agreement Between Parent and District is a form used between the parent and the district for the following situations:

1. Not conduction and evaluation for eligibility (used in very unusual and rare circumstances)
2. Excuse a required IEP team member
3. Revise an IEP outside of the IEP meeting

The Corbett School District Written Agreement Between Parent and District form can be found in the *Reference Documents* section.

Special Education Action

This form should be utilized any time action is being taken within Special Education, including annual IEP, evaluation, eligibility, and any other formal decisions. This form can be found in the *Reference Documents* section.

Graduation Requirements

The Diploma Options Form should be completed by the end of the student's 5th grade year. The Diploma Decision Form should be completed by the end of the student's 8th grade year. These forms can be found in the *Reference Documents* section.

Records Retention

Special Education Student Records

Records document students participating in special education programs and early intervention special education services. Records may include speech/hearing, academic, motor, occupational and/or physical therapy, vision/hearing, interdisciplinary team, and classroom observation reports; records relating to student behavior including psychological and social work reports; assessments obtained through other agencies; contact sheets; severity rating scales; test result records; physician's statements; parental consent records; educational program meeting records; request for hearing records; eligibility statements; individualized education plans (IEP); individualized family service plans (IFSP); and related correspondence and documentation.

Minimum retention:

1. Records documenting speech pathology and physical therapy services:
Until student reaches age 21 or 5 years after last seen, whichever is longer
2. ESD copies, if program at district level: Transfer records to home district after end of student participation
3. Readable photocopies of records necessary to document compliance with State and Federal audits retained by the former educational agency or institution when a student transfers out of district: 5 years after end of school year in which original record was created.

Also, OAR 581-021-0255 addresses the transfer of student records when a student transfers to another district - subsection (4) states that the prior district will retain originals of the records for as long as the state archivist rules require or, if the new district requests the originals, the following photocopies must be retained for as long as required by state archivist rules:

1. The student's permanent record as defined in subsection (11) of OAR 581-021-0220; and
2. Such special education records as are necessary to document compliance with state and federal audits.

Testing Protocols

Testing Protocols should be retained for three years and then destroyed.

Working Files

Working files may contain: progress reports, contact logs, data collection, etc. At the end of each year, teachers must go through the working file and destroy documents that are not needed and transfer all other documents to the SPED file. A general rule is do not put anything in a working file that you would not want to disclosed through a records request.

Records Retention Reference Sheet

General Records Retention Schedule, OAR 166-400-0010, 0300, & 0060. A complete list of record types and descriptions can be found at the Oregon Administrative Rules website. The record types listed below are considered 'common' records used at Corbett Schools.

**After school year in which records were created **Until student reaches age 21 or graduates, whichever is longer SIS – Student Information System*

Record Type	Example of record type	Minimum Retention Period	OAR Reference	Location	Available in SIS?
Alternative School Referral Records	Document referrals sent to alternative schools seeking placement of students whose public school attendance and/or disciplinary records has been unsatisfactory.	3 years *	166-400-0060 (1)	Counselor file	No
Athletic Activity Records	Document student eligibility & participation in interscholastic competitive sports and athletic activities. Includes parent consent forms.	5 years *	166-400-0060 (2)	Athletic file	No
Attendance Records	Daily attendance sheet, truancy records, excused & unexcused absences, tardiness records. Parent notes.	3 years *	166-400-0060 (3)	Cum file or Attendance file	Yes
Behavior Records, Minor	Infractions which do not result in suspension, expulsion or in referral for special educational services.	End of school year	166-400-0060 (5)	Cum file or Attendance file	Yes
Behavior Records, Major	Records document infractions which result in suspension or expulsion.	Age 21 **	166-400-0060 (4)	Cum file or Attendance file	Yes
Compulsory Attendance Excuse Records	Records document the formal excuse of a student under age 16 from compulsory school attendance.	Age 21 **	166-400-0060 (11)	Cum file	No
Grade Records	Teacher grade books, grade change records, final grade rosters, tests, assignments and homework scores.	6 years *	166-400-0060 (13)	Cum file and various school locations	Partial
Grade Reports	Document grades received by students in a variety of reports organized by school, class, special program or other grouping. May include administrative reports, counselors' reports, grade point average reports, honor roll reports, etc..	3 years *	166-400-0060 (14)	School Office	Partial
Guidance & Counseling Records	Education planning records, post-high school plans, career goals, college & scholarship applications.	3 years *	166-400-0060 (16)	Counselor file	No
Health Log Records	Document the daily activities of and visits to the Health Room/Nurses Office.	6 years *	166-400-0010 (17)	Cum file (Health)	No
Health Records or Student Health Records	Document health care responsibilities & activities performed by school or district health professionals or non-health staff. Medication administration records, assessment records and health plans.	Age 21 **	166-400-0060 (29)	Cum file (Health)	No
Health Screening Records	Document the health screening status of students and mandated certifications of health. Include vision and hearing screening results, CIS status, TB Clearance Certificate.	Age 21 **	166-400-0060 (30)	Cum file (Health)	No
Immunization Records	Document the immunization status of an individual student. CIS and records tracking susceptibility documents. Note: CIS is not available in SIS.	Age 21 **	166-400-0060 (31)	Cum file (Health)	Yes

Record Type	Example of record type	Minimum Retention Period	OAR Reference	Location	Available in SIS?
Oregon Student Record or Permanent Record	Document containing a core set of information about an individual student.	75 years	166-400-0060 (32) 166-400-0010 (25)	Cum file AND District office	Yes
Parent-Teacher Conference Records	Document a teacher's report to parents or guardians of student's progress prior to end of grading period.	3 years *	166-400-0060 (22)	Cum file	No
Parental/Custodial Delegation Records	Court records such as restraining orders, specification of rights and related documents.	Age 21 **	166-400-0060 (23)	Cum file (Confidential)	No
Permission Slips	Documents permission to attend activities, participate on field trips, etc.	3 years *	District requirement	Cum file or Attendance file	No
Programs Student Records	Document the placement & participation of students in educational programs. May include TAG, Early Childhood, School To Work, Cooperative Work Experience.	3 years * Federal Prog: 5 yrs*	166-400-0060 (12)	Cum file	Partial
Records Request	Request to transfer records.	5 years *	166-400-0030 (11)	Cum file or School Office	No
Registration Records	Enrollment or registration forms.	3 years *	166-400-0060 (26)	Cum file	No
Report Cards, Elementary	Report card grades are NOT stored on the Oregon Student Record. Report cards are stored in the SIS. Report cards are placed in the cum file at withdrawal.	75 years	166-400-0060 (27)	Cum file AND District office	Yes
Report Cards, Middle & High	Report card grades are NOT stored on the Oregon Student Record. Report card grades (final) are stored on the official transcript in the SIS. Report cards or transcripts are placed in the cum file at withdrawal.	6 years *	166-400-0060 (27)	Cum file	Yes
Special Education Student Records	Document students participating in special education programs.	6 years *	166-400-0060 (28)	Cum file (SPED)	Partial
Test Administration Records	Document the administration of assessment, placement, diagnostic, credit by exam, and other tests. Records may include but are not limited to rosters of test takers; testing rules and regulations; test administration records; payment records; placement and test results; summary reports of results; and related correspondence and documentation.	3 years *	166-400-0010 (46)	Cum file and various locations (EasyCBM, ODE, MIM, school)	Partial
Transcript	Transcript of final grades, credits and diploma requirements.	75 years	166-400-0060 (27)	Cum file AND School office/district office	Yes
Truancy Records	Document non-attendance or truancy of students. Notices of non-attendance, staff reports, hearing records, suspension notifications.	3 years *	166-400-0060 (34)	Cum file or Attendance file	Partial

Location Storage

Cumulative File & Folders	<p>Records stored in a student's cumulative file.</p> <ul style="list-style-type: none"> • Are sent or transitioned to a new school. • Original documents are maintained by the student's current school. • Copies are not required when transferring a student cumulative file. • Folders within the cumulative file may include: <ul style="list-style-type: none"> ○ Health, Confidential, Special Education (SPED) 	<p>Recommendation:</p> <ul style="list-style-type: none"> • See the document titled "Student Cumulative File Contents & Retention Schedule". • Create folders within the file to group records.
Attendance / Behavior File	<p>Records stored in a student's attendance file.</p> <ul style="list-style-type: none"> • Includes behavior records (major and minor), permission slips, attendance records and notes. • Major behavior records are required to be stored until the age of 21. • SIS reports containing behavior information and current year attendance are placed in a student's cumulative file at withdrawal. 	<p>Recommendation:</p> <ul style="list-style-type: none"> • When transferring a student's cumulative file, make sure the major behavior record types are included.
Athletic File	<p>Records stored in a student's athletic file:</p> <ul style="list-style-type: none"> • Includes eligibility documents, physical examination records, consent forms, etc.. • Athletic records have a 5 year retention requirement. • Are not sent or transitioned to a new school. • SIS reports containing extra-curricular participation may be placed in the student's cumulative file at withdrawal (not a requirement). 	<p>Recommendation:</p> <ul style="list-style-type: none"> • These can be store in the student's cumulative file or in the athletic office.
Counselors File	<p>Records stored in a student's counselor file:</p> <ul style="list-style-type: none"> • Includes placement information, scholarship documents, etc.. • Are not sent or transitioned to a new school unless requested. • SIS reports such as current course schedule, current grades and transcript will be placed in a student's cumulative file at withdrawal. 	<p>Recommendation:</p> <ul style="list-style-type: none"> • Inactive student records (graduates) are pulled at the end of every year and stored with recorded date that meets the end of the retention period (3 years).
District Office	<p>The district office will:</p> <ul style="list-style-type: none"> • Store SIS reports that meet the 75 year retention period. This includes the Student Permanent Record, Elementary Report Cards, Middle and High School Transcripts. • SPED district department will maintain student SPED folders beyond the 21 year age retention. 	
School Office	<p>The school office will:</p> <ul style="list-style-type: none"> • Store and maintain student cumulative files and folders, attendance file, athletic file and counselor's file. • Forward student SPED folders to the SPED district department prior to shredding a student's cumulative file. • Retain all record requests for student's files for the required retention period (5 year). Record requests are not required to be stored in a student's cumulative file. • Maintain and meet retention period requirements for all 'Grade Records' and 'Grade Reports' as described above (6 years). 	<p>Recommendation:</p> <ul style="list-style-type: none"> • Store record requests in binders for the retention period. • Scan and store record requests on CD.