

# Create and Manage Records like a Pro

People have a right to see records about them. All records created by District staff could be subject to a FOIP request.

Emails, PowerSchool log entries, chats and anecdotal notes are our most requested records. Does the thought of releasing some of your emails—perhaps those written in haste or anger— make you squirm? Remember, embarrassment is not an exception under the FOIP Act. Write all records as though the parent or interested party is going to read it.

## Top Tips for Creating Good Records

- Write a record quickly after an event. Your memory will fade.
- Use professional language and be prepared to justify what you write.
- Be detailed, factual and neutral.
  - Record professional observations, not personal opinions.
  - State opinions as opinions.
  - Review the record to ensure your emotions are not colouring the content.
- Choose the appropriate format for keeping information. Consider what type of information you are collecting, how it will be used, who it is being shared with, and who has access to it.
- Rewrite your record if you would be embarrassed to see it on the front page of a newspaper, or have anyone involved with the situation read it.
- If a FOIP request has been received or you think there may be a FOIP request, it is too late to edit your records.

## Reasons for Records

- Records can reveal patterns. If similar situations are happening in a student's other classes, records can provide a "big picture" view and be a step toward helping the student.
- Accurate, neutral and detailed documentation is credible, even in "he said, she said" situations. If a situation escalates, records will become important for the staff and District to respond to complaints, FOIP requests, and litigation.
- Records help ensure that critical details aren't lost, and allow others to understand events and meet their professional duties.
- Records document our work.

### Manage Your Records

- Dispose of transitory records (most drafts, working copies, notes, phone messages) when no longer useful.
- Clean up your email regularly. Transfer emails that need to be kept for business or educational purposes to another repository (e.g., administrative file).
- Do not destroy original records before the retention period and without proper authorization
- Be aware of what is a record (e.g., Google Hangouts, text messages, chats, handwritten notes).

### PowerSchool Log Entries

Log entries were designed to allow the student's teachers and school administration to be able to enter notes about the student into PowerSchool (e.g., absences, lates, discipline issues, parent contact). Log entries should not be used as an administrative file.

- Do not include reports that belong in the student record (e.g., expulsion reports, Attendance Board, etc.).
- Include only relevant content from email. Avoid copying and pasting ongoing conversations. Determine if summaries of emails from parents, leadership services, teachers and school administration need to be included (full emails and email streams should not be copied and pasted into log entries).
- Be selective when including summaries of conversations with District staff and social workers.

## Record Management Questions and Answers

**Q. I counselled a student and made notes during our conversation. The student asked that our discussion be kept confidential. The parent is now asking for a copy of the notes. What should I do?**

A. If the student has the expectation of privacy and confidentiality, we would not release the records (unless the student was at risk). We want to ensure that these records are handled appropriately and access is limited.

**Q. I manage the school office and have all these files and records that I don't know what to do with. Can you help?**

A. Call the District's Record Management Consultant at 780-497-7489 for assistance.

Learn more about the District's policies on record management by reading Administrative Regulation CN.AR: [Creation, Use and Maintenance of District Information](#).

### Contacts

District FOIP Coordinator: 780-429-8357

Central Records: 780-497-7489

District Information Management: 780-429-8350

<http://districtrecords.epsb.ca/>

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