



Montessori in Delta Society

STUDENT RECORDS AND BEST PRACTICES POLICY

Policy Rationale & Purpose

Independent school authorities are well served by policies and practices regarding student records. Such policies and practices will benefit independent school students, parents, office staff, administrators, and authorities by providing guidance for the collection of information and its storage, use, transfer, and protection. Legal and public expectations regarding the confidentiality, disclosure and transfer of school student records are increasing, as are societal concerns regarding school record keeping and storage. The legal framework for the development of this policy is provided by Section 6.1 of the *Independent School Act*, Sections 9 and 10 of the *Independent School Regulation* (the Regulation), the *Student Records Order* (I 1/07) (the Order), and the *Personal Information Protection Act* (PIPA). Section 9(2) of the Regulation obliges independent school authorities to, subject to the requirements of the Order, (a) establish written procedures regarding the storage, retrieval and appropriate use of student records, and (b) ensure confidentiality of the information contained in the student records and ensure privacy for students and their families.

In addition to the above, the Office of the Inspector of Independent Schools and FISA BC have collaborated in producing the *Student Records Requirements and Best Practice Guidelines for Independent Schools*, Ministry of Education, June 2012, which serves as a guide for independent school policy development in this area.

The School Authority may add, modify, or remove portions of this policy when it is considered appropriate to do so, if it is not in conflict with legal requirements and government policy.

Boundary Bay Montessori School is committed to ensuring that student records are handled in accordance with all legal requirements.

The purpose of this policy is to establish procedures for the collection of student information and its storage, use, disclosure, transfer, and protection.



Scope

This Policy applies to all families registering their children (Kindergarten-Year &) to attend Boundary Bay Montessori School.

Policy Statement

The following policy statements are provided to inform all parties who collect, store, use, disclose, transfer, and protect student information.

Boundary Bay Montessori School will undertake the following.

- Ensure that the Academic Director is responsible for the establishment, security and maintenance of the Student Record and Student File (as defined in this policy) for each student registered in the school according to the procedures defined in this policy.
- Only collect, use or disclose personal information with the consent of the individual student or legal guardian, unless otherwise authorized under PIPA.
- On or before collecting personal information, disclose to the individual student verbally or in writing the purposes for the collection of personal information.
- Only collect, use or disclose personal information for purposes that a reasonable person would consider appropriate in the circumstances and that fulfill the purposes disclosed by the school or are otherwise permitted under PIPA.
- Secure student records and student files with access within the School Authority restricted to the Academic Director, administrative staff, the student's teachers, and support staff who, by the nature of their work, are required to have access to the student's information.
- Provide access to personal information about an individual student to the individual student (if capable of exercising PIPA rights), and to a parent or legal guardian of the individual student during school hours and under the supervision of the Academic Director or designate.
- Subject to legal requirements, ensure that personal information will be retained only for the period of time required to fulfill the purpose for which it was



collected.

- Inform parents that concerns, complaints, and questions about personal information handling policies and practices of the School Authority may be directed to the Academic Director or Montessori in Delta Society President by calling the school office.

1) Definitions and Student Record Components

The following elements comprise the student record:

- the Permanent Student Record (PSR), as defined in the Students Records Order (1/07):
 - Form 1704, PSB 048 (revised 1997) completed according to the Permanent Student Record Instructions that are effective at the time of completion; and
 - Student Progress Reports for the two most recent years or an official transcript of grades;
- all documents listed as inclusions on Form 1704 (see 21.4.2 below);
- a copy of the student's current Student Learning Plan, if any; and
- a copy of the student's current Individual Education Plan (IEP), if any.

2) Permanent Student Record (Form 1704) Inclusions

The following inclusions must be listed on Form 1704, including document date, title and expiry date or date rescinded (if applicable), and copies of the documents listed must be filed with the PSR:

- health services information as indicated by the medical alert checkbox, such as diabetes, epilepsy, anaphylaxis producing allergies, and any other condition which may require emergency care;
- court orders as indicated by the legal alert checkbox;
- other legal documents (e.g. name change or immigration document);
- support services information (e.g. psychometric testing, speech and hearing tests, adjudication requirements for completing assessment activities);
- current IEP and/or Case Management Plan (CMP) where applicable; and
- notification of a student being home schooled.

3) Student File

Additional items must (see Table 5, Column A) or may (see Table 5, Column B) be included in the school’s Student Records as part of the Student File. As of January 2018, all newly received items will be date stamped and listed on the student’s Form 1704 under “Student Record Inclusions” before they are placed in the Student File. These items include the following (Table 5).

Table 5. Information to be Included in Student File	
Column A (Must be Included)	Column B¹ (May be Included)
legal name of child – verify the original and file a photocopy or scanned copy of birth certificate or similar legitimate identification document	Care Card number
	emergency contact numbers of parents, guardians and designated alternates
official name(s) of parent(s) or guardian(s) with home and work contact information	doctor’s and dentist’ name and contact information
	previous Student Progress Reports (other than the two most recent years required in the PSR)
Form A: Verification that parent/guardian is legally admitted to Canada and a resident of BC and student is for funding (see Appendix)	serious discipline reports resulting in suspension or expulsion, or when sharing information of the disciplinary concern will benefit the needs and support of the student in his/her new school (e.g. copies of letters to parents/guardians regarding discipline matters and corrective actions taken)
	reports of important meetings/discussions relating to the student
	standardized test scores, records of information which an educator deems relevant and important to the educational program of the student

¹ At Boundary Bay Montessori School, the following information is collected from enrolled students. This information is part of the Student File, but will not be forwarded to other schools as part of the Student Record, except as noted in reports of important meetings/discussions relating to the student, standardized test scores, records of information which an educator deems relevant and important to the educational program of the student.



4) Sensitive Student Information

Sensitive student information may include information which by its nature requires that school staff observe a high level of confidentiality. Examples include:

- psychiatric reports;
- family assessments;
- referrals to, or reports from, school arranged counselling services; or
- record of a school-initiated report of alleged sexual or physical abuse made to a child protection social worker under the CFCS (Section 14).

Documents falling under the Sensitive Student Information category must be handled using the following practices.

- Documents may only be forwarded after written, dated and signed consent has been obtained from parents for the collection, use and disclosure of psychiatric reports or family assessments.
- Documents must be stored in the locked filing cabinet holding Student Files in the Academic Director's office. Only the Academic Director and the student's teacher may view the document, unless permission for others to view is obtained from parents in writing.
- Records will not be disclosed or transferred to a new school as part of the school record without written, dated and signed consent being obtained from parents.
- Reports under Section 14 of the CFCSA will NOT be disclosed to third parties or transferred to other schools.
- Reports made under Section 14 of the CFCSA will be sealed in an envelope and placed in a specific confidential file in the Academic Director's office. No other staff, other than the individual who initiated the report and the Academic Director, shall have access to any Section 14 report.

5) Procedures

The Academic Director or designate will be responsible for the following.

- Updating Form 1704 as information changes and the student progresses through the system.



6) Student Record and Student File Retention

The required inclusions are to be included in the PSR. Refer to Table 6 below for a summary of Student Record and Student File Retention requirements

Table 6. Summary of Student Record and Student File Retention			
Student Records		Student Files	
Active	Inactive	Active	Inactive
Student Records are locked in the fireproof cabinet in the Academic Director's office. Access is restricted to those employees (the Administrative Assistant, teachers and tutors) who, by the nature of their work, are required to have access.	Unless another school requests a Student Record (see section 6 below), the School Authority archives Student Records for 55 years after a student has withdrawn and not enrolled in another K-12 school, or graduated from the school.	Student Files are locked in the fireproof filing cabinet in the Academic Director's office. Access is restricted to those employees (such as the Academic Director, the Administrative Assistant, teachers, and tutors) who, by the nature of their work, are required to have access.	The School Authority archives Student Records for 55 years after the student has withdrawn or graduated from the school.
The School Authority protects personal information from unauthorized access, collection, use, disclosure, copying, modification, or disposal, or similar risks. Procedures for such protection are outlined below.	The archived Student Records are stored securely and in a manner that ensures their preservation from calamity (fire, flood, etc.) Access is limited to the Academic Director or the Administrative Assistant.	The School Authority protects personal information from unauthorized access, collection, use, disclosure, copying, modification, or disposal, or similar risks. Procedures for such protection are outlined below.	The archived Student Records are stored securely and in a manner that ensures their preservation from calamity (fire, flood, etc.) Access is limited to the administration or designate.
The Academic Director or designate will regularly review Student Records to ensure that the information is current and complies with legal requirements.	The Administrative Assistant keeps a record of Student Records that are destroyed (shredded) after 55 years.	The Academic Director or designate will regularly review Student Files to ensure that the information is relevant and important to the educational program of the student.	The Academic Director or designate is responsible for determining the relevancy of the contents in Student Records before being archived.



7) Currency of Student Records

Student eligibility information (see Appendix – Form A) will be updated during student registration each year. As stated above, the Academic Director or designate will regularly review Student Records and Student Files to ensure that the information is current and complies with legal requirements.

8) Security of Student Information Off Campus

The Academic Director is responsible for ensuring that personal information taken off campus is safely stored and that personal information is protected.

9) Handling of Sensitive Student Information

Access to Sensitive Student Information is restricted to the Academic Director or a person or persons authorized by the Academic Director to access such information defined in the section titled “Sensitive Student Information” in this policy.

10) Use of Student Personal Information

The Montessori in Delta Society and Boundary Bay Montessori School will use a student’s personal information for the following purposes.

- To communicate with the student and/or the student’s parent or legal guardian, to process a student’s application, and to provide a student with the educational services and co-curricular programs provided by Boundary Bay Montessori School.
- To enable the Montessori in Delta Society to operate its administrative function, including payment of fees and maintenance of ancillary school programs such as the PAC and fundraising activities.
- To provide specialized services in areas of health, psychological or legal support, or as adjunct information in delivering educational services that are in the best interests of the student.

11) Access to and Disclosure of Student Records

A student (capable of exercising PIPA rights) and a parent/legal guardian of a student is permitted (unless restricted by a court order) to do the following.



- Examine the Student Record and Student File kept by Boundary Bay Montessori School/Montessori in Delta Society pertaining to that student, while accompanied by the Academic Director or designate to interpret the records.
- Receive a copy of any student record upon request. The Montessori in Delta Society reserves the right to recover the direct cost of copying records. An entitled person may access and verify personal information in the Student Record and Student File pertaining to the particular student with a minimum of one week's notice during the school year (September to June) to the school administration. Access will be provided during school hours. During summer hours, access to Student Records and Student Files may be made by appointment and is subject to availability of the Academic Director or designate.

12) Disclosure for Delivery of Health Services, Social Services, or other Support Services

Access to a Student Record or Student File will only be granted, upon assurance of confidentiality (with consent), to professionals who are planning for or delivering education, health, social or other support services to that student. Consent will be obtained in writing, listing the name and date of birth of the student, the name and signature of the parent/guardian, and the date of the request.

In the case of a request for personal student information from separated or divorced parents, the Montessori in Delta Society will be guided by the legal custody agreement, a copy of which should be provided to the Academic Director. In cases where the Academic Director is unsure if the non- custodial parent is entitled to access personal student information, the school's legal counsel will be consulted for a recommendation.

13) Transfer of Student Records

On receipt of a request for student records from a school, a Board of Education, or an Independent School Authority from within British Columbia where the student is (or will be) enrolled, the Montessori in Delta Society will first obtain written, dated and signed notice of transfer from the student's parent, and will then transfer that student's PSR (including declared inclusions), the current Student Learning Plan (if any), and the current IEP (if any) to the requesting institution.

In the event that a parent notice has not been returned by the parent within a reasonable time frame (i.e. one month into the new school year), the Montessori in Delta Society will



transfer the student's PSR (including declared inclusions), the current Student Learning Plan (if any), and the current IEP (if any) to the requesting institution. The Montessori in Delta Society will notify the parent by letter that this transfer has taken place.

The Montessori in Delta Society will retain a copy of the PSR, indicating the school where the records have been sent and the date of the student record transfer.

If the requesting institution is outside British Columbia, a photocopy of the PSR will be sent (including declared inclusions), along with the current Student Learning Plan (if any), and the current IEP (if any).

Requests for a student's record from a public school require that the public school administration provide a copy of the PSR (including declared inclusions) and current Student Learning Plan (if applicable) and IEP (if applicable) to the Independent School Authority. The original PSR must be retained by the public school.

The School Authority will only transfer sensitive, confidential information (e.g. psychiatric assessments) after dated and signed parent/guardian consent has been obtained.

The School Authority will not transfer a record of a Section 14 *Child, Family and Community Service Act* report of alleged sexual or physical abuse made to a child protection social worker.

A summary of a former student's school progress may be provided to prospective employers, at the written request of a former student. The School Authority reserves the right to assess a fee for this service.

A Student Record will be reviewed when a student transfers. The Academic Director will ensure that the documents listed as inclusions are still required inclusions (e.g. not expired or rescinded) or still deemed to be relevant and important to the educational program of the student. Expired, rescinded, or irrelevant inclusions will be removed from the Student Record and the documents themselves will be shredded.

14) Additional Resources

Refer to Student Records Acts, Regulations, and Guidelines for the following:

- information on student record legislation;
- student record requirements and guidelines; and
- relevant acts and regulations.

APPENDIX – FORM A: STATUS OF PARENT/GUARDIAN (ADMISSION TO CANADA AND RESIDENCY)



Ministry of Education
Office of the Inspector of
Independent Schools

*Independent School Student Records
Requirements and Best Practices Guidelines*

APPENDIX II

The following are suggested formats for Student Registration Forms to verify parental/legal guardian lawful admission to Canada and residency in British Columbia. This information must be included in the student records.

STATUS OF PARENT/GUARDIAN (ADMISSION TO CANADA AND RESIDENCY) - FORM A
(if parents are deceased, use Form B)

To be completed and signed by a parent or legal (court-appointed) guardian. (If legal guardian, attach copy of court order appointing you as legal guardian).

(Lawfully Admitted into Canada)

1. I am (please X one):

- A Canadian citizen (if not born in Canada, please attach a photocopy of citizenship paper/card)
- A Permanent Resident (landed immigrant) (attach photocopy of landed immigrant status paper or PR card)
- Lawfully admitted into Canada under the Immigration and Refugee Protection Act (Canada) with one of the following documents (please mark the appropriate box below and attach photocopy of document):
 - Admission as a refugee or refugee claimant
 - Valid student permit for two or more years (or issued for one year but anticipated to be renewed for one or more additional years)
 - Valid employment authorization (work permit) for two or more years (or issued for one year but anticipated to be renewed for one or more additional years)
- A person carrying out official duties under the authority of the Visiting Forces Act or as an accredited diplomatic agent, preclearance officer, consular officer or official representative in Canada of a foreign government with a consular post in British Columbia.
- Other - Document description: (must be cleared with Citizenship and Immigration Canada)

(Residency in British Columbia)

2. I am a resident of British Columbia (please X one):

- Yes Residency address: _____
- _____
- No I am not a resident of British Columbia

Confirming signatures:

3. Parent/Legal Guardian's name: _____

Parent/Legal Guardian's signature: _____

Date: _____