

Halton District School Board

Operational Policies/Procedures

NUMBER:	<i>to be determined</i>
TOPIC:	Ontario Student Records (OSRs)
EFFECTIVE:	September 2004
CROSS-REFERENCE:	N/A
REVISION DATE:	As required
RESPONSIBILITY:	Superintendent of Education (Program)

Introduction:

The Ontario Student Record (OSR) is the record of a student's educational progress through schools in Ontario. The Education Act requires that the principal of a school collect information "for inclusion in a record in respect of each pupil enrolled in the school and to establish, maintain, retain, transfer and dispose of the record". The Act also regulates access to an OSR and states that the OSR is "privileged for the information and use of supervisory officers and the principal and teachers of the school for the improvement of instruction" of the student. Each student and the parent(s) of a student who is not an adult (that is, a student who is under the age of eighteen) must be made aware of the purpose and content of, and have access to, all of the information contained in the OSR.

In 2000, the Ontario Ministry of Education released The Ontario Student Record (OSR): Guidelines (replacing 1989 Guidelines).

POLICY STATEMENT:

It is the policy of the Halton District School Board, with respect to the Ontario Student Record (OSR), to be in compliance with policies set out in the Ontario Ministry of Education's OSR Guideline, 2000.

PROCEDURES:

Procedures for the implementation of the Ontario Student Record Guideline, 2000 in the Halton District School Board are outlined in the **Ontario Student Record Guideline, 2000: Halton Procedures, 2004** (attached).

Ontario Student Record Guideline, 2000

Halton Procedures, 2004

September, 2004



Halton District School Board
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PURPOSE OF THIS MANUAL

The Halton District School Board has developed this OSR operating manual in compliance with policies set out in the Ministry of Education's OSR Guideline 2000. The manual is to be implemented in Halton DSB schools. This manual will:

- identify those who are responsible for maintaining OSRs;
- outline additional criteria and procedures for the OSR specific to the Halton District School Board schools; and
- implement mandatory changes as indicated within the guideline.

Ontario Student Records are to be maintained for all students in compliance with the Education Act, Municipal Freedom of Information and Protection of Privacy Act and all applicable regulations and guidelines of the Government of Ontario and the Halton District School Board.

Ontario Student Record (OSR) Guideline,
2000:
HALTON PROCEDURES, 2004.

2000 OSR MINISTRY GUIDELINES	HALTON PROCEDURES
INTRODUCTION	

The Ontario Student Record (OSR) is the record of a student's educational progress through schools in Ontario. The Education Act requires that the principal of a school collect information "for inclusion in a record in respect of each pupil enrolled in the school and to establish, maintain, retain, transfer and dispose of the record". The act also regulates access to an OSR and states that the OSR is "privileged for the information and use of supervisory officers and the principal and teachers of the school for the improvement of instruction" of the student. Each student and the parent(s)¹ of a student who is not an adult (that is, a student who is under the age of eighteen) must be made aware of the purpose and content of, and have access to, all of the information contained in the OSR.

This guideline sets out the policies of the Ministry of Education with regard to the establishment, maintenance, use, retention, transfer, and disposal of the OSR. It replaces the *Ontario Student Record (OSR): Guideline, 1989*.

This guideline will be revised as needed. Each page of the guideline is dated, and replacement pages will be provided with a revision date.

The contents of this guideline have been reviewed for compliance with the provincial Freedom of Information and Protection of Privacy Act and the Municipal Freedom of Information and Protection of Privacy Act. When implementing the policies contained in this guideline or set by the school board,² school staff must take into consideration the requirements of the relevant freedom of information legislation.

The OSR folder, Ontario Student Transcript, documentation file folder, and office index card are available from those vendors that are listed on the ministry's website, at <http://www.edu.gov.on.ca>. Samples of these OSR components are contained in appendices A, C, D, and E, respectively, to this guideline.

Other forms needed for the OSR are available on the ministry's website. Samples are provided in appendices F, G, H, I, J and K to this guideline. School boards and schools may wish to download and print these forms themselves, or they may have them printed by vendors of their choice. In either case, no changes of any kind may be made to the forms.

For instructions for obtaining the provincial report cards and for samples, boards and schools should refer to the *Guide to the Provincial Report Card, Grades 1–8* and the *Guide to the Provincial Report Card, Grades 9–12*. The provincial report cards are also available on the ministry's website.

1. Throughout this document, *parent(s)* is used to refer to both parent(s) and guardian(s).

2. The terms *school board* and *board* refer to district school boards and school authorities.

The Ontario Student Record (OSR) is governed by the policies of the OSR Guideline 2000 issued under Section 8 (1) (27) of the Education Act. The OSR Ministry Guideline, 2000 and the policies and procedures of the Halton District School Board will be implemented simultaneously.

The Halton District School Board policies and procedures have been outlined in the right column of this document to comply with the OSR Guideline 2000 and the Education Act. The principal must comply with the OSR Guideline 2000 and the policies and procedures set out by the board in this document.

1. ESTABLISHMENT OF THE OSR	HALTON PROCEDURES
<p>An OSR will be established for each student who enrolls in a school operated by a school board or the Ministry of Education.³ Each student and the parent(s) of a student who is not an adult must be informed of the purpose and content of the OSR at the time of enrolment.</p> <p>The OSR is an ongoing record and will be transferred, under the conditions outlined in section 6 of this guideline, if the student transfers to another school in Ontario.</p> <p>Any part or parts of the OSR may be microrecorded or recorded and stored electronically in a manner that permits the printing of a clear and legible reproduction. Provision should be made to retain original documents when it is important to keep an original signature or initial on a document. Any microrecording, electronic file, reproduction, or facsimile of an OSR is subject to the security and access requirements applicable to the original OSR.</p> <p>If an OSR folder is lost or inadvertently destroyed, a new OSR folder will be created. Previous information can be obtained from the current office index card and, if applicable, from the card(s) at the previous school(s). A notation will be made in the margin on the front of the new OSR folder that gives the date on which the new folder was created and the reason.</p> <p>The following schools in Ontario may choose to establish and maintain an OSR for their students:</p> <ul style="list-style-type: none"> • private schools • schools operated by Indian and Northern Affairs, Canada, in First Nation communities (referred to as <i>federal schools</i> in this document) • First Nation schools operated by Native education authorities <p>All schools that establish and maintain an OSR for their students must do so in accordance with this guideline.</p>	<p>The office index card must be stored in a secure location. (See also Section 3.5)</p>

2. RESPONSIBILITY FOR THE OSR

HALTON PROCEDURES

School boards are responsible for ensuring compliance with the policies set out in this guideline. Boards will specify those persons responsible for performing clerical functions with respect to the establishment and maintenance of the OSR. Boards will also develop policies for determining:

- the types of information beyond those specified in this guideline that could be considered to be conducive to the improvement of the instruction of the student;
- the uses of the information and materials contained in the OSR beyond those specified in this guideline (see [section 3.4](#));
- the relevance of the materials in the OSR, with a view to removing those no longer considered to be conducive to the improvement of the instruction of the student (see [section 9](#));
- the times other than those specified in this guideline at which it could be considered appropriate to issue report cards (see [section 3.2.3.1](#));
- the types of information beyond those required by this guideline that could be added to the office index card (see [section 3.5](#)).

In addition, boards will develop procedures to be followed to ensure:

- the security of the information contained in the OSR, whether it is maintained electronically or in hard copy, during both the period of use and the period of retention and storage;
- the regular review of the OSR for the removal of any material that is no longer considered to be conducive to the improvement of the instruction of the student;
- the storage of the OSR for the period specified in the retention schedule (see [section 8](#));
- the complete and confidential disposal of material removed from the OSR.

Boards will ensure that all persons that they assign to perform clerical functions with respect to the establishment and maintenance of the OSR are aware of the confidentiality provisions in the Education Act and the relevant freedom of information and protection of privacy legislation.

It is the duty of the principal of a school to:

- establish, maintain, retain, transfer, and dispose of a record for each student enrolled in the school in compliance with this guideline and the policies established by the board;
- ensure that the materials in the OSR are collected and stored in accordance with the policies in this guideline and the policies established by the board;
- ensure the security of the OSR;
- ensure that all persons specified by a board to perform clerical functions with respect to the establishment and maintenance of the OSR are aware of the confidentiality provisions in the Education Act and the relevant freedom of information and protection of privacy legislation.

“Clerical Functions” means filing, establishing, maintaining, requesting and transferring OSRs. In addition, in secondary schools, it means creating Ontario Student Transcripts, removing outdated Ontario Student Transcripts and removing duplicate report items older than 5 years except for the Student Record card and the OSOR index folder.

Persons who may be assigned clerical functions with respect to the establishment and maintenance of the OSR include:

- school personnel designated by the principal
- teachers
- **computer services support staff responsible for the technical maintenance and support of the computerized OSR information.**

Security of OSR

The principal will designate the person or persons who shall maintain the security of the student records.

- Security of the OSR must be provided for both active and inactive OSR files.
- Electronically stored OSR data must comply with the same access and security provisions as the hard copy. Unattended computer terminals should be turned off or secured in an appropriate manner.

All parts of the OSR must be stored in filing cabinets. The filing cabinets may be left unlocked during normal office hours. The files should be located in areas of restricted access. Filing cabinets will be secured at times beyond normal office hours. If possible, the filing cabinets will be kept in rooms with lockable doors.

The OSR files will remain in the school at all times except at a meeting sanctioned by a Supervisory Officer or the Principal.

If it is necessary for authorized personnel to take OSRs out of the Guidance or main office, the personnel removing the OSR will make a record (on an OSR sign-out card) indicating the student’s name, remover’s name, time and date when removed and returned. In most cases, the OSR will be returned and so recorded on the same day. If it is necessary to have OSRs away from the storage area, the OSR will be stored within the school in an area which ensures that confidentiality will be maintained. It is to be returned as soon as possible.

Office Index Cards – this information is subject

	to the same criteria regarding access and security as all other components of the OSR.
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3. COMPONENTS OF THE OSR	HALTON PROCEDURES
<p>An OSR will consist of the following components:</p> <ul style="list-style-type: none"> • an OSR folder in Form 1A or Form 1 • report cards • an Ontario Student Transcript, where applicable • a documentation file, where applicable • an office index card • additional information identified as being conducive to the improvement of the instruction of the student 	
<p>3.1 The OSR folder</p>	
<p>Principals must establish an OSR folder, Form 1A (see appendix A), for students enrolling in school for the first time after September 1, 1985. For students attending school who enrolled in school before that date, the OSR folder Form 1 must be adjusted to correspond to Form 1A (see appendix B). The folder will contain the parts set out below in sections 3.1.1 to 3.1.7.</p>	
<p>3.1.1 Biographical data: Part A</p>	
<p>The following information will be provided:</p> <ul style="list-style-type: none"> • the student’s full name and date of birth (The principal will indicate the method of verification on the folder – e.g., birth certificate, baptismal certificate, passport – and will initial and date the folder.) • a student number assigned by the school or the school board, where applicable • a Ministry Identification Number (MIN) or Ontario Education Number (OEN) assigned by the ministry, where applicable 	
<p>3.1.2 Schools attended: Part B</p>	
<p>The following information will be provided:</p> <ul style="list-style-type: none"> • the name of each school that the student has attended • the name of the board, the name of the Native education authority, or the name of the person who operated the private or federal school • the date of entry and the date of the last day of attendance in each grade • the name of a teacher contact <p>Where the student is transferring to a school from an educational institution that was not required to maintain an OSR, Part B may include any information that will complete the record of schools previously attended.</p>	<p>3.1.2 - Schools Attended: Part B - The teacher contact will be designated by the principal.</p>
<p>3.1.3 Retirement from an Ontario school: Part C of Form 1A or Parts J and K of Form 1</p>	
<p>The following information will be provided on retirement (see also section 7):</p> <ul style="list-style-type: none"> • the date of retirement • the student’s address at retirement • the student’s destination at retirement with respect to further education or employment 	
<p>3.1.4 Names of parent(s): Part D</p>	

<p>The following information will be provided:</p> <ul style="list-style-type: none"> the first name of the student’s parent(s) or the first name and surname of the student’s parent(s) when the surname of the latter differs from that of the student if applicable, the date of death of the parent(s) of a student opposite the name of the deceased 	
<p>3.1.5 Special health information: Part E</p>	
<p>A summary of a student’s special health conditions will be included when such conditions are disclosed to the principal. Entries in Part E will be dated and kept current.</p>	
<p>3.1.6 Photographs and information on school activities: Parts F and G of Form 1A or Parts F, G, and I of Form 1</p>	
<p>This information may be inserted if it satisfies the policies on inclusion set out by the board (see section 2).</p>	<p>3.1.6 - Photographs – There will be a minimum of one photograph in each of: JK/K, Primary, Junior and Intermediate Divisions.</p>
<p>3.1.7 Additional information: Part H</p>	
<p>The following information will be provided, if applicable:</p> <ul style="list-style-type: none"> the date on which the student enters a Supervised Alternative Learning for Excused Pupils (SALEP) program (Regulation 308), as well as the SALEP committee report, which is to be inserted in the OSR documentation file (see section 3.4) 	<p>3.1.7 - Third party reports received but returned to sender, should be noted in this section (e.g. doctor’s letters, discharge report).</p> <p>NOTE: No information shall disclose contravention or alleged contravention by the student of any statute or regulation to which the Youth Criminal Justice Act or Part V-A of the Provincial Offences Act applies.</p>

ADDITIONAL INFORMATION to be filed in OSR folder. (see also Halton Administration Procedures 01.05.01 – Qualifications to Attend the Halton District School Board and Guidelines for Student Registration)

- Credit status (i.e., substitute, equivalency); PLAR (see Appendix K), correspondence, Music Certificates accepted for Credits, equivalent Out of Province/Country Documentation
- French Demission Forms for Core French (grades 4 through 9) or French Immersion/Extended French-
- Grade 10 Ontario Secondary School Literacy Results
- Health information
- Suspension letters
- Truancy letters/ frequent absence letters
- Other correspondence that will enhance instruction of student

Although the Annual Education Plan (AEP) is not part of the OSR, schools are encouraged to forward the AEP when a student transfers from one school to another.

Note: All letters being filed in the OSR shall contain a notation to that effect (i.e. copy: OSR)

3.2 REPORT CARDS	HALTON PROCEDURES
3.2.1 The Provincial Report Card, Grades 1-8	
3.2.1.1 Use and Completion	
<p>All school boards will use the Provincial Report Card, Grades 1–8, in all their elementary schools at least three times a year.</p> <p>A completed Provincial Report Card, Grades 1–8 (all three pages), or an exact copy of it, will be filed in the OSR folder for each student who has been enrolled in the school for more than six weeks from the commencement of the reporting period:</p> <ul style="list-style-type: none"> • at the time of his or her transfer to another school; or • at the time of his or her retirement from school; or • at the end of each of three reporting periods, the first to occur during the fall. <p>The Provincial Report Card, Grades 1–8, or an exact copy of it, will be forwarded to the parent(s) of a student who is not an adult or to the student if he or she is an adult.</p>	<p>Report cards shall be filed in reverse chronological order. (i.e., most recent on top.)</p>
3.2.1.2 Content	HALTON PROCEDURES
<p>See the Guide to the Provincial Report Card, Grades 1–8 for available versions and information about the content.</p>	
3.2.1.3 Quality of paper	
<p>The paper used to produce the report card must be suitable for long-term storage.</p>	
3.2.1.4 Electronic format	
<p>School boards may use an electronic format of the Provincial Report Card, Grades 1–8, to facilitate completion and use. However, a completed Provincial Report Card, Grades 1–8, or an exact copy of the report card, must be filed in the OSR as a hard copy.</p>	

3.2.2 The Provincial Report Card, 9-12	HALTON PROCEDURES
3.2.2.1 Use and Completion	
<p>Beginning with the 1999-2000 school year, boards will use the Provincial Report Card, Grades 9-12, for students in Grade 9 in all their secondary schools. Boards will use the Provincial Report Card, Grades 9-12 for students in Grades 9 and 10 in the 2000-2001 school year; for students in Grades 9, 10, and 11 in the 2001-2 school year; and for students in Grades 9 to 12 in the 2002-3 school year and thereafter.</p> <p>A completed Provincial Report Card, Grades 9-12 (all three pages), or an exact copy of it, will be filed in the OSR folder for each student who has been enrolled in the school for more than six weeks from the commencement of the reporting period:</p> <ul style="list-style-type: none"> • at the time of his or her transfer to another school; or • at the time of his or her retirement from school; or • two times in each semester for semestered schools, the first to occur during the fall; or • at the end of each of three reporting periods, the first to occur during the fall, for non-semestered schools. <p>The Provincial Report Card, Grades 9–12, or an exact copy of it, will be forwarded to the parent(s) of a student who is not an adult or to the student if he or she is an adult.</p>	
3.2.2.2 Content	HALTON PROCEDURES
See the Guide to the Provincial Report Card, Grades 9–12 for available versions and information about the content.	
3.2.2.3 Quality of paper	HALTON PROCEDURES
See section 3.2.1.3 .	
3.2.2.4 Electronic format	HALTON PROCEDURES
School boards may use an electronic format of the Provincial Report Card, Grades 9–12, to facilitate completion and use. However, a completed Provincial Report Card, Grades 9–12, or an exact copy of the report card, must be filed in the OSR as a hard copy.	

3.2.3 Board report cards	HALTON PROCEDURES
3.2.3.1 Use and Completion	
<p>Boards may develop and use their own report cards for students in Junior Kindergarten and Kindergarten. They will use their own report cards for students in Grades 10, 11, and 12 until required to use the Provincial Report Card, Grades 9–12, as indicated in section 3.2.2.1. In addition, they may use their own report cards for students with an Individual Education Plan (IEP), as indicated in the <i>Guide to the Provincial Report Card, Grades 1–8</i> and the <i>Guide to the Provincial Report Card, Grades 9–12</i> under “IEP”.</p> <p>Boards that have more reporting periods than those stipulated in section 3.2.1.1 and section 3.2.2.1 may use board-developed reports at such times.</p> <p>A report card will be completed and filed in the OSR folder for each student who has been enrolled in the school for more than six weeks from the commencement of the reporting period:</p> <ul style="list-style-type: none"> • at the time of his or her transfer to another school; or • at the time of his or her retirement from school; or • at the end of the school year; or • at the end of each semester, if the school is organized on a semester plan; or • at such other times that the board may stipulate. <p>The report card or an exact copy of it will be forwarded to the parent(s) of a student who is not an adult or to the student if he or she is an adult.</p>	<p>For students in grades 1 through 8 who are not receiving a provincial report card, the only alternate report card is the IEP, accompanied by page 3 of the Provincial Report Card.</p> <p>For students in grades 9 through school leaving who are not receiving a provincial report card, the only alternate report card is the IEP, accompanied by page 3 of the Provincial Report Card.</p> <p>For students in JK/SK who are not receiving the regular board report card, the individualized kindergarten report or the student’s Individual Education Plan (IEP) are the only alternate report cards. They must be filed in the OSR.</p> <p>English as a Second Language reports, Special Support Teacher reports and Learning Centre reports should be included in the OSR in the Documentation File.</p>
3.2.3.2 Content	HALTON PROCEDURES
<p>For those grades where there is no provincial report card, and under the conditions indicated in section 3.2.3.1, a school board will approve, for use in its schools, report cards that will include the following:</p> <ul style="list-style-type: none"> • the full name of the student, as recorded on the OSR folder • the name and address of the school and any other particulars that may be required to identify the school • the name of the principal • the signature of the teacher • the signature of the principal • the record of attendance of the student at school • the date the report card is issued • for all courses taken, the student’s level of achievement (indicated by an anecdotal description, a percentage grade, or a letter grade) or a statement that there has been insufficient time to assess the achievement of the student. 	

- the grade in which the student is placed or to which he or she is promoted
- for each secondary school course, the title and common course code of the course
- for each secondary school course taken for credit, the value of the credit(s) assigned to the course (expressed as a whole number or a number with up to two decimal places), or for a course for which a credit is not given, the words “non-credit course”
- space for comment by the parent(s) of a student who is not an adult or the student if he or she is an adult
- the following statement to parents and students:

To Parents and Students

This copy of the report card should be retained for reference. The original or an exact copy has been placed in the student’s Ontario Student Record (OSR) folder and will be retained for five (5) years after the student leaves school.

3.2.3.3 Quality of paper	HALTON PROCEDURES
See section 3.2.1.3 .	
3.3 The Ontario Student Transcript	HALTON PROCEDURES
<p>The requirements for the OST are outlined in the Ontario Student Transcript (OST): Manual, 1999. Beginning with the 1999–2000 school year, the OST will be a cumulative and continuous record of a student’s successful completion of Grade 9 and 10 courses, successful and unsuccessful attempts at completing Grade 11 and 12 courses and Ontario Academic Courses, and completion of other diploma requirements. The OST is part of the OSR. When it is maintained as a hard copy, it should be filed in the OSR folder. When it is maintained electronically, a hard copy must be produced and maintained in accordance with the Ontario Student Transcript (OST): Manual, 1999. For a sample of the OST form, see appendix C to this guideline.</p>	<p>An official copy of the OST will be filed in the OSR upon –</p> <ul style="list-style-type: none"> • Graduation • Transfer • Retirement <p>At all other times the OST will be maintained as an electronic file. Students may require a copy of their Ontario Student Transcript (OST) upon</p> <ul style="list-style-type: none"> • Transferring to another secondary school • Applying to a private post-secondary training program, college or university • Transferring to a school outside of Ontario • Graduating • Leaving school • Applying for a scholarship or bursary, or • Applying for a job • OSTs will be provided to retired students on request for a fee of \$5.
3.4 The Documentation File	HALTON PROCEDURES
<p>When a documentation file is required, it will be kept in the OSR folder. A documentation file will be established when the following information is required:</p> <ul style="list-style-type: none"> • verification of a custody order • verification of a change of surname (see section 10) • a written request to be named by repute (see section 10.1) • the statement of decision of an Identification, Placement, and Review Committee (IPRC); the recommendation of an appeal board and the decision of the school board regarding identification and/or placement, where applicable; and a tribunal’s decision regarding identification and/or placement, where applicable • an Individual Education Plan (IEP) for a student receiving special education programs and services • educational, psychological, and health assessments • an Intensive Support Amount (ISA) status form • the report of a Supervised Alternative Learning for Excused Pupils (SALEP) committee 	<p>The following shall also be included in the Documentation File: (See HDSB Appendix 1 – Storage and Disposition of OSR and Contents)</p> <ul style="list-style-type: none"> • The description of results of performance in the Grade 4 gifted screening process for students who meet the Halton criteria for gifted identification based solely on the Otis Lennon School Ability Test and the Ross Test of Higher Cognitive Abilities • English as a Second Language reports, Special Support Teacher reports and Learning Centre reports. • All IEPs and IEP parent contact records • All Letters of Invitation to IPRC (copy)

<ul style="list-style-type: none"> • letters of request for a correction to, or a deletion from, the record where the request has not been granted (see section 9) • other reports and/or information identified in accordance with the policies established by the school board (see section 2) • a Violent Incident Form (see appendix J)⁴ <p>A sample documentation file folder is provided in appendix D.</p> <p>When a report is requested from a professional, paraprofessional, or other relevant person, that person should be advised that the report will be filed in the OSR and will be subject to the access provisions governing the OSR.</p> <p>As with other material included in an OSR, these reports should only be included if, in the principal's opinion, they are conducive to the improvement of the instruction of the student.</p> <p>4. See the ministry's publication Violence-Free Schools Policy, 1994, Part Two, Section V, "Record Keeping of Violent Incidents Leading to Suspension/Expulsion and Reports to the Police", pp.m 39-40, for details on the keeping of records on violent incidents.</p>	<ul style="list-style-type: none"> • All IPRC Waiver Letters (copy) • The School Psychological Services Memo notifying the school that an assessment has been completed. If a parent has refused permission for an assessment recommended by the SRT, the Principal will indicate this in a letter to the parent with a copy to the OSR (c. OSR – Documentation File) • A copy of the Behaviour Action Team Consent Form • EQAO exemption permission letters • Behaviour Management Plans • Suspension Letters attached to a Violent Incident Form
<p>3.5 The office index card</p>	<p>HALTON PROCEDURES</p>
<p>The office index card provides the school with immediate access to information about a student. It will remain at the school during the period in which the student is enrolled at the school. The card is not filed in the OSR folder and is not transferred with the OSR when the student transfers from the school. A sample office index card is provided in appendix E.</p> <p>The office index card will record the following information:</p> <ul style="list-style-type: none"> • the full name of the student, as recorded on the OSR folder • the number assigned to the student by the school or school board, where applicable • a Ministry Identification Number (MIN) or Ontario Education Number (OEN) assigned by the ministry, where applicable • the gender of the student • the student's date of birth (year, month, day) • the name(s) of the student's parent(s) • if applicable, the name(s) of the individual(s) who has (have) custody of the student • the student's current address and home telephone number, as well as an emergency number if one has been provided • the dates (year, month, day) on which the student enrolls in the school, transfers from the school, and/or retires from school • the name and address of the school to which the student transfers and the date on which the OSR is transferred • the student's address on the date of transfer or retirement • the name and address or some other means of identification of the school from which the student is transferring or retiring 	<p>The Office Index Card may also include the following information:</p> <ul style="list-style-type: none"> • Ontario Health Number • Doctor's name and phone number • critical health factors as agreed to in writing by parent/guardian • parent/guardian business contact • number of siblings in the same school • person with whom student resides • additional information supplied by parent for inclusion • homeroom class/teacher adviser • current grade • previous school and board • citizenship, date of entry, tuition fees • enrolment in French Immersion in current year • information specified by school use indicator • school may include additional information provided by the parent for the safety and well-being of the student <p>The Official Index Card is stored separately from the folder.</p> <p>NOTE that all security, storage and disposal procedures apply equally to the office index card as well as to the OSR folder.</p>

<ul style="list-style-type: none"> • other information that is identified in accordance with the policies established by the school board (see section 2) <p>When a student transfers to another school, or to a private, federal, or First Nation school, or retires from school, the office index card will be stored at the sending school or at a central record office provided by the board.</p>	<p>The office index card is always retained by the sending school upon transferring the OSR file. Each school must maintain active and inactive Office Index Files.</p>
<p>3.6 Student record of accumulated instruction in French as a second language in elementary school</p>	<p>HALTON PROCEDURES</p>
<p>An individual record of accumulated instruction in French as a second language will be established and maintained for each student enrolled in an elementary school. The record will be kept on a card that is identical to the one in appendix E, and will include all of the information required for each entry. An entry will be made on the record:</p> <ul style="list-style-type: none"> • at the end of a school year, semester, or summer course; and • when a student transfers to another school, including a private, federal, or First Nation school; and • when a student retires from school. <p>If a student has had previous instruction in French but no record is available, the entries on the card must be started at least from the date of enrolment in an Ontario school. A note will be made on the first lines of the instruction card indicating what is known about a student's previous instruction in French as a second language and in other subjects taught in French. If the number of accumulated hours must be estimated, an annotation must indicate that the figure is approximate.</p>	<p>If a student is demitted from French, the demission form is to be filed in the OSR.</p>

3.7 Prior Learning Assessment And Recognition (PLAR) challenge for credit: cumulative tracking record	HALTON PROCEDURES
<p>If a secondary school student challenges for credit for a Grade 10, 11, or 12 course through the Prior Learning Assessment and Recognition (PLAR) challenge process, a record of all credits earned and attempted will be established and will be maintained in the student's OSR. This record will be kept on the form entitled "PLAR Challenge for Credit: Cumulative Tracking Record" (see appendix K). The student's passing percentage grade, failing percentage grade, or withdrawal from the challenge process must be entered on this form. (If it is necessary to use more than one "Cumulative Tracking Record" form to record a student's attempts to challenge for credit, the additional form(s) should be attached to the original form.)</p> <p>As stated in Policy/Program Memorandum No. 129, "Prior Learning Assessment and Recognition (PLAR): Implementation in Ontario Secondary Schools", issued July 6, 2001, there are two possible tracking forms – the "Cumulative Tracking Record" and the "Interim Tracking Record". Only the "Cumulative Tracking Record" form will be maintained in the student's OSR. If a student earns a credit through the challenge process in a school outside his or her regular school (the regular school is the school that maintains the student's OSR), the principal of the school outside the student's regular school will use the "Interim Tracking Record" form (provided in the memorandum) to communicate the results of the student's challenges for credit to the school that maintains the OSR. The principal of the student's regular school will enter the information onto the "Cumulative Tracking Record" form in the student's OSR.</p>	<p>See Appendix K (Ontario Student Record (OSR) Guidelines, 2000) and Halton Procedures for PLAR.</p>

4. ACCESS TO THE OSR	HALTON PROCEDURES
<p>Access to an OSR means the right of those persons authorized by the Education Act or other legislation to examine the contents of the OSR. In addition, municipal and provincial freedom of information legislation permits persons who have the right to have access to personal information to receive copies of the information. This provision applies during both the period of use of the OSR and the period of retention and storage.</p> <p>Both the Municipal Freedom of Information and Protection of Privacy Act, which applies to schools operated by school boards, and the Freedom of Information and Protection of Privacy Act, which applies to Provincial and Demonstration Schools, prohibit institutions from releasing personal information in their custody or under their control to anyone other than the person to whom the information relates, except in certain circumstances. These circumstances are defined in the legislation, and it is up to the head of an institution to decide whether or not to grant access to personal information in such circumstances. School boards should therefore consult with their freedom of information coordinators to determine whether they should develop policies on access to OSRs. Any such policies must be developed in accordance with the legislation.</p> <p>Boards should develop their own consent forms, which they must use where the consent of the parent(s) or adult student is required for the release of information from the OSR. It is not acceptable to use Form 14 for this purpose; Form 14 should only be used for the release of clinical records under the Mental Health Act.</p>	<p>4. Access to the OSR The following personnel have the right to examine the contents of the OSR:</p> <ul style="list-style-type: none"> • the student • the student’s parent(s) or guardian(s) if the student is under 18 years of age • for students who are under 18 years of age and for whom Family and Children’s Services has a supervision order, the agency is the official guardian, therefore, the parent/guardian access is limited to the Family and Children’s Services social worker; • supervisory officers, the principal, and teachers of the school (those who hold a valid certificate of qualification or a letter of standing as a teacher in an elementary or secondary school in Ontario and who are assigned to the school by the Board – includes itinerant teachers, coordinators and consultants who are certified teachers) for the purpose of improving the instruction of the student. • access to OSR by Professional Support Services Personnel requires signed parent permission • access to the OSR by students and/or their parents or guardians occurs in the presence of the school principal or designate
4.1 Students	HALTON PROCEDURES
<p>Every student has the right to have access to his or her OSR.</p>	<p>4.1 Students Although the non-adult student has access to the OSR the non-adult student does not have the right to request that information be withdrawn, corrected or placed in the OSR. The right of “consent” remains with the parent/guardian until the student reaches 18 years of age.</p>
4.2 Parents	HALTON PROCEDURES
<p>The parents of a student have the right to have access to the student’s OSR, until the student becomes an adult (age eighteen). Under both the Children’s Law Reform Act and the Divorce Act, 1985, the legal right of a non-custodial parent to have access to a child includes the right to make inquiries and to be given information concerning the child’s health, education, and welfare.</p>	<p>4.2 Parents A non-custodial parent has access to the record unless access is denied by a court order, divorce decree or some other legal document.</p>
4.3 Educational personnel	HALTON PROCEDURES
<p>Under the Education Act, only supervisory officers and the principal and teachers of the school have access to the OSR for the purpose of improving the instruction of the student. As noted above, additional access may be permitted under municipal and provincial freedom of information legislation, under specified and limited circumstances.</p>	<p>Additional Ministry and Board educational personnel may access the OSR only as directed by the Principal/Designate.</p>
4.4 Ministry and school boards	HALTON PROCEDURES
<p>The Education Act permits the compiling and delivery of information contained in an OSR if it is required by the Minister of Education or the school board. In instances where ministry staff members are seeking to collect information from OSRs, students who are adults and parents of students who are not adults will be notified.</p>	

4.5 Courts/law enforcement agencies	HALTON PROCEDURES
<p>Subsection 266(2) of the Education Act states that the OSR will not be produced in the course of any legal proceedings. There may be occasions, however, when access to the OSR of current students or former students will be sought. In such cases, boards should obtain legal advice from their lawyers in order to deal with such issues as the following:</p> <ul style="list-style-type: none"> • whether the Education Act in fact prevents the production of the OSR • whether the OSR in question is relevant to the proceedings • if the OSR is relevant to the proceedings, whether a copy, rather than the original, may be submitted to the court <p>All of these issues are relevant in both civil and criminal cases (see section 4.5.1 and section 4.5.2).</p> <p>Both the municipal and provincial freedom of information acts permit disclosure of personal information for the purposes of law enforcement. The conditions for disclosure and the definition of “law enforcement” are contained in the legislation. School boards should consult with their freedom of information coordinators and their legal counsel to determine whether they should develop policies on the disclosure of personal information in an OSR to courts and law enforcement agencies.</p> <p>In court proceedings, subject to an appeal, the judge’s order must be followed. If a principal receives a court order requiring the release of an OSR, the principal should contact the board’s legal counsel. Although court orders must be followed, the principal should obtain legal advice about the issues listed above.</p>	<p>Surrendering an OSR: There are restrictions placed on the use of the Ontario Student Record (OSR) in court proceedings (Subsection 266(2) of the Education Act). If an OSR must be surrendered and/or removed from the school as a result of a search warrant, subpoena or court order, the principal shall follow the procedures in section 4.5 and ensure that:</p> <ul style="list-style-type: none"> • in all cases, the principal shall contact the appropriate Superintendent of Education and FOI Coordinator to determine whether to seek a legal opinion from the Board’s solicitor before taking action. • the individual requesting the OSR does hold the position of authority that is claimed and • the action taken is documented and includes the signature of the official receiving the OSR;
4.5.1 Civil suits	HALTON PROCEDURES
<p>A principal may be served with a subpoena requiring that he or she appear in court on a particular date and bring part or all of an OSR. If a principal receives a subpoena, he or she must comply with it, but should obtain legal advice from the board’s legal counsel about the issues in section 4.5 above.</p> <p>As a general rule, the principal should go to court with both the original OSR and a complete and exact photocopy of it, and should propose to the judge that the photocopy be submitted instead of the original. The principal should also inform the judge that the subpoena is inconsistent with subsection 266(2) of the Education Act. The principal must, however, relinquish the documents if ordered to do so by the judge.</p>	
4.5.2 Cases involving the criminal code	HALTON PROCEDURES
<p>The Criminal Code is federal legislation; where there is a conflict between it and provincial legislation, it takes precedence. Therefore, if a principal is served with a search warrant under the Criminal Code requiring the surrender of an OSR to the police, or is served with a subpoena requiring his or her appearance at court with the OSR, he or she is obliged to comply with the search warrant or the subpoena. In both cases, the principal should obtain legal advice from the board’s legal counsel about any relevant issues, including those in section 4.5. The principal should also inform the relevant authority (i.e., the police or the judge) that the use of any part(s) of the OSR as evidence in court proceedings is inconsistent with subsection 266(2) of the Education Act. The principal should present the police or the judge with both the original OSR and a complete and exact photocopy of it, and should propose that the photocopy be submitted instead of the original.</p>	
4.5.3 Provisions under the Child and Family Services Act	HALTON PROCEDURES
Under the Child and Family Services Act, R.S.O. 1990, c. C.11, it is possible for	

a court to order a principal of a school to produce a student's OSR for inspection and copying. A court may make such an order if it is satisfied that (a) a record contains information that may be relevant to a consideration of whether a child is suffering abuse or likely to suffer abuse, and (b) the person in control of the record has refused to permit a Children's Aid Society director to inspect it. If a principal receives a court order under the Child and Family Services Act, he or she should seek legal advice about how to comply with it.

5. USE AND MAINTENANCE OF THE OSR

HALTON PROCEDURES

Information from an OSR may be used to assist in the preparation of a report required under the Education Act or the regulations made under it. Information from an OSR may also be used in the preparation of a report for an application for further education or an application for employment, if a written request for such a report is made by an adult student, a former student, or the parent(s) of a student.

The freedom of information legislation sets out criteria for the use of personal information. The purposes for which personal information in a student's OSR is being used must be consistent with the policies in this guideline and with school board policies. Students who are adults and parents of students who are not adults should be informed of the uses of personal information at the time that that information is collected for inclusion in an OSR.

The contents of the OSR should be reviewed on a regular basis according to the policies established by the school board to ensure that they remain conducive to the improvement of the instruction of the student. Any such review must comply with the provisions of section 9 of this guideline.

See HDSB Appendix 2, OSR Maintenance Checklist)

The principal is responsible for the use and maintenance of the OSR and for assigning tasks related to that function to appropriate staff.

The organization of OSR contents outlined below is intended to be from the front to the back of the OSR:

1. most recent OST
2. report cards – organized chronologically with the most recent at the front
3. any other documentation
4. Documentation File

Note: All materials in the OSR should be dated

Review Procedures:

If certain information or material in an OSR folder is determined to be no longer conducive to the improvement of the instruction of the student, the principal may authorize the removal of the item(s).

The removal of information included in the OSR should be judged case by case:

- is the information accurate?
- is the information current?
- will the information assist in the improvement of instruction?
- is the student (or parent, where the student is not an adult) informed of the inclusion of the information?

Security for information contained in the OSR must be provided during the period of use, retention or storage.

The OSR should be reviewed by the principal, or the principal's designate. This will help ensure that the information is relevant, accurate and conducive to the student's education.

The OSR is reviewed by the principal, or the principal's designate, when the student transfers or retires from the school. See HDSB, Appendix 1, Storage and Disposition of OSR and Contents. A person designated by the principal is to be a member of the instructional staff who has received the required instruction and criteria for conducting the review.



No documentation related to the IPRC process, including IEPs, should be removed from the Documentation File. See HDSB, Appendix 1, Storage and Disposition of OSR and Contents.

<p>6. TRANSFER OF THE OSR</p> <p>The transfer of the OSR means the transfer of all parts of the OSR other than the office index card (see section 3.5 for information on the index card). Subject to the conditions outlined below, the original OSR is transferable only to schools in Ontario.</p> <p>When a student transfers to another school in Ontario, the receiving school must be sent written notification of the student’s transfer (see form in appendix G) indicating that the student’s OSR will be sent upon receipt of an official written request (see form in appendix H or I). When a student transfers to another school outside Ontario, only a copy of the student’s OSR may be sent upon receipt of an official written request from the receiving school. See sections 6.1 to 6.3.</p> <p>If the original OSR is being transferred between schools operated by the same school board, it may be transferred by a delivery service provided by the board.</p> <p>If the original OSR is being transferred to a school in another board, to a private, federal, or First Nation school, or to a Provincial or Demonstration School, it must be transferred by Priority Post or an equivalent delivery method that is approved by the board and that maintains confidentiality and guarantees prompt delivery.</p> <p>If some or all of the information in the OSR has been microrecorded or stored electronically and if the receiving school is capable of receiving this information in microrecorded form or electronically in such a way that the OSR can be effectively reproduced or viewed, the information may be transmitted to the receiving school either as a microrecording or by electronic transmission in advance of the paper parts of the OSR.</p> <p>If a school is transmitting OSR information electronically or by means of facsimile, arrangements must be made to ensure the secure and confidential transfer of the information.</p>	<p>HALTON PROCEDURES</p> <p>See HDSB, Appendix 1, Storage and Disposition of OSR and Contents</p> <ol style="list-style-type: none"> 1. Review the OSR record and remove information that is no longer conducive for the improvement of instruction of the student. The principal is responsible for making certain that the removal of this information complies with the OSR Guideline and policies set by the Board. 2. All letters requesting the transfer of OSR records from Halton DSB schools will be filed in a binder and retained for one full school year beyond the year the OSR was transferred. These letters of request will be filed in the Office Index Binder of Secondary Schools and retained for one year.
<p>6.1 Transfer to a school in another board or to a provincial or demonstration school in Ontario</p>	<p>HALTON PROCEDURES</p>
<p>Before a principal transfers an original OSR to a school operated by another school board in Ontario, or to a Provincial or Demonstration School in Ontario, the principal must receive a written request for the information from the principal of the receiving school. A sample form for indicating this official request for information is provided in appendix H</p>	
<p>6.2 Transfer to a private, federal, or first nation school in Ontario</p>	<p>HALTON PROCEDURES</p>
<p>Before a principal transfers an original OSR to an inspected private school, a non-inspected private school, or a federal or First Nation school in Ontario, the principal must have received:</p> <ul style="list-style-type: none"> • a written request for the information from the receiving school, in which the school agrees to accept responsibility for the OSR and to maintain, retain, transfer, and dispose of the OSR in accordance with this guideline (see appendix I); and • a written statement indicating consent to the transfer, which is signed by the parent(s) of the student if he or she is not an adult, or by the student if he or she is an adult. 	
<p>6.3 Transfer to an educational institution outside Ontario</p>	<p>HALTON PROCEDURES</p>
<p>An original OSR may not be transferred outside Ontario. Only an exact copy of the OSR may be sent to the principal of an educational institution outside Ontario after the principal who is responsible for the OSR has received:</p>	<p>The original OSR will be retired and stored at the sending school.</p>

<ul style="list-style-type: none"> • a written request for the information from the principal of the educational institution outside Ontario; and • a written statement indicating consent to the transfer, which is signed by the parent(s) of the student if he or she is not an adult, or by the student if he or she is an adult. 	
7. RETIREMENT OF A STUDENT	HALTON PROCEDURES
<p>A student retires from school when he or she ceases to be enrolled in school. A student is not considered to have retired if he or she (a) withdraws for a temporary period with the written consent of the principal, or (b) transfers to another school in Ontario.</p> <p>When a student retires from the school that maintained an OSR for the student, the principal will give the following to the parent(s) of the student if he or she is not an adult, or to the student if he or she is an adult:</p> <ul style="list-style-type: none"> • an up-to-date copy of the student’s OST, if applicable • the information and materials stored in the OSR folder that are not required to be retained under the retention schedule provided in section 8 	<p>See HDSB Appendix 1 Storage and Distribution of OSR and Contents.</p>

8. RETENTION, STORAGE, AND DESTRUCTION OF INFORMATION IN THE OSR	HALTON PROCEDURES
<p>Regulations under freedom of information legislation require that personal information that has been used by an institution be retained by the institution for at least one year after use, unless the individual to whom the information relates consents in writing to its earlier disposal. Therefore, any personal information placed in an OSR should be retained by the school for at least one year after use, unless the principal receives written consent to its earlier disposal.</p> <p>The following components of the OSR will be retained for five years after a student retires from school:</p> <ul style="list-style-type: none"> • report cards • the documentation file, where applicable • additional information that is identified by the school board as appropriate for retention <p>The following components of the OSR will be retained for fifty-five years after a student retires from school:</p> <ul style="list-style-type: none"> • the OSR folder • the OST • the office index card <p>The destruction of all or any part of the OSR when its retention is no longer required under this guideline will be effected under conditions that ensure the complete and confidential disposal of the record.</p>	<p>See HDSB Appendix 1 – Storage and Disposition of OSR and Contents.</p> <p><u>DISPOSAL OF OSR MATERIALS</u></p> <ul style="list-style-type: none"> • As materials are removed from OSR and are no longer conducive to the improvement of instruction: <ul style="list-style-type: none"> ○ Elementary Schools shall forward these materials to the J.W. Singleton Centre in a package clearly marked “For Shredding” ○ Secondary Schools shall contact the current shredding company contracted by the Halton District School Board to arrange for disposal of these materials. • It is recommended that a box be maintained at the school for this purpose. • Materials removed for shredding shall be kept secure from invasion of privacy at all times. • All materials removed from the OSR shall be destroyed under conditions that ensure the complete and confidential disposal of the record, or returned to the sender. <p><u>STORAGE OF OSR</u></p> <p>When a school is closed, records of retired students shall be moved to the school receiving the majority of the affected students.</p>

9. CORRECTION OR REMOVAL OF INFORMATION IN THE OSR	HALTON PROCEDURES
<p>If certain information or material in an OSR folder is determined, according to the board's policies, to be no longer conducive to the improvement of the instruction of the student, the principal will have the information or material removed from the OSR folder. Such information will be given to the parent(s) of a student who is not an adult or to the student if the student is an adult, or it will be destroyed (see section 8).</p> <p>If the parent(s) or adult student is (are) of the opinion that the information contained in the student's OSR is inaccurately recorded or that it is not conducive to the improvement of the instruction of the student, the parent(s) or adult student may request in writing that the principal correct the alleged inaccuracy or remove the information from the record. If the principal complies with the request, the material will be corrected or will be removed from the file and destroyed or returned to the parent(s) or the adult student, and no record of the request will be retained in the OSR.</p> <p>If the principal refuses to comply with the request, the parent(s) or the adult student may request in writing that the principal refer the request to the appropriate supervisory officer. The supervisory officer will either (a) require that the principal comply with the request, or (b) submit the OSR and the request to a person designated by the Minister of Education. If the supervisory officer requires that the principal comply with the request, no record of the request will be retained in the OSR. If the supervisory officer submits the request to a person designated by the Minister, that person will hold a hearing, which the principal and the person(s) who made the request will attend. After the hearing, the person designated by the Minister will make a decision on the matter. This decision will be final and binding. If the person designated by the Minister requires that the principal comply with the request, no record of the request will be retained in the OSR. If the person designated by the Minister denies the request, the original request, including the date on which it was made, and the statement of this final decision will be retained in the documentation file.</p> <p>Freedom of information legislation also permits persons to request that recorded personal information be corrected.</p> <p>Every principal will ensure that no OSR discloses (a) the contravention or alleged contravention by a student of any statute or regulation to which the Young Offenders Act (to be superseded Youth Criminal Justice Act) by or Part V- A of the Provincial Offences Act applies, or (b) the disposition of any proceedings brought under those statutes or regulations. If an entry in an OSR does disclose such information, the principal of the school in which the student is enrolled will ensure that the entry is altered appropriately or deleted from the OSR.</p>	<p>The principal may consult with the Superintendent or FOI Coordinator regarding such requests to determine if there is any need to seek advice from the Board's solicitor.</p>

10. CHANGE OF SURNAME	
10.1 Change by repute	HALTON PROCEDURES
<p>When a principal receives a written request from an adult student or the parent(s) of a student who is not an adult that the student be identified by a surname other than the legal surname of the student and when (a) the student is known by a surname other than his or her legal surname, (b) the surname is a name obtained by repute, and (c) the use of the surname is in the student’s best interests, the principal will record the requested surname in Part A of the OSR folder in addition to the legal surname of the student, and the requested surname will be used henceforth. In this case, the legal surname will be enclosed in brackets. The written request will be stored in the documentation file (see section 3.4).</p>	<p>If a student’s name changes by repute, the OSR will be filed under the requested name and a card will be placed in the sequence where the legal name would appear.</p> <p>10.1 Change of Name by Repute</p> <ul style="list-style-type: none"> • The legal name must always be retained on the hard copy and electronic copy of the OSR. • Change by Repute refers to the change of a <u>student’s surname only</u>. • Secondary schools must be careful to register all new grade 9 students from the OSR file in order to make certain that the electronic file contains the legal name. • “Repute” is defined in the Webster’s International Dictionary as – “commonly ascribed to, being favorably known or spoken of; according to reputation or popular belief”. • The principal will record the requested surname by repute in Part A of the OSR folder in addition to the legal surname that will be enclosed in brackets.
10.2 Change by marriage	
<p>When a principal receives a document that establishes that a student for whom the principal maintains an OSR has had his or her surname changed by marriage, the principal will file the document, a copy of the document, or a verification of his or her knowledge of the document in the documentation file, and will change the surname of the student on all current and future components of the OSR.</p>	
10.3 Change by law	
<p>When a principal receives a document that establishes that a student for whom the principal maintains an OSR has had his or her surname changed in accordance with the law of the province, state, or country in which the document was made, the principal will file the document, a copy of the document, or a verification of his or her knowledge of the document in the documentation file, and, on request, will change the surname of the student on all components of the OSR so that the record will appear as if originally established in the new surname.</p>	

11. CONTINUING EDUCATION RECORDS	HALTON PROCEDURES
<p>For each student enrolled in a school board continuing education course or program for the purpose of achieving an Ontario secondary school credit or credits, the principal of the continuing education course or program will establish an office index card, which will contain the following information:</p> <ul style="list-style-type: none"> • the full name of the student • the number assigned to the student by the school or school board, where applicable • a Ministry Identification Number (MIN) or Ontario Education Number (OEN) assigned by the ministry, where applicable • the gender of the student • the student’s date of birth (year, month, day) and the source used to verify the date • if applicable, the name(s) of the individual(s) who has (have) custody of the student and for whom verification of the custody order is included in the documentation file • the student’s current address and home telephone number, as well as an emergency number if one has been provided • the dates (year, month, day) on which the student enrolls in the program, transfers from the program, and/or retires from the program • the name and address of the school to which the student transfers and the date • the student’s address on the date of transfer or retirement • the name and address or some other means of identification of the continuing education program from which the student is transferring or retiring • other information that is identified in accordance with the policies established by the school board (see section 2) <p>The OST will be maintained by the principal of the continuing education program. If, however, the student is also enrolled in a day school program, the principal of the continuing education program will forward information on credits earned to the principal of the day school program for inclusion in the student’s OST.</p>	<p>See HDSB Appendix 3 (Storage and Disposition of Documentation for Students Enrolled in Adult Day School and Alternative Education Programs).</p>

HALTON DISTRICT SCHOOL BOARD

Appendix 1

Storage and Disposition of O.S.R. and Contents

Description	Storage	Duration	Disposition	
			transfer within HDSB	transfer to another Ont. Bd.
O.S.R. (Ontario Student Record)	• locked filing cabinets	55 years after student retires from school	• to new school • not packaged with other materials • clearly labeled as OSR(s)	• upon written request • send via courier
Office Index Cards	• secure cabinets	retain most recent copy	• no	• no
O.S.T. Ontario Student Transcript	• O.S.R.	55 years after student retires from school	• in O.S.R.	• in O.S.R.
Alternate Report Card (Kindergarten report card or I.E.P.)	• O.S.R.	5 years after student retires from school	• yes	• yes
Assessment (Psych., Speech/Language, Health, Behaviour)	• with parental permission • O.S.R. - Documentation File	5 years after student retires from school	• yes	• no – remove and return to Education Centre
Principal letter of response to parent refusal of permission for recommended assessment	• O.S.R. – Documentation File	5 years after student retires from school	• yes	• yes
Behaviour Action Team Consent Form	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Behaviour Management Plans	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• no
Credit Status (substitute credits, equivalency, PLAR)	• O.S.R.	5 years after student retires from school	• yes	• yes
Custody order verification	• O.S.R. – Documentation File	Until student's 18 th birthday	• yes	• yes
Demission/Exemption Forms (French, EQAO)	• O.S.R.	5 years after student retires from school	• yes	• yes
ESL Reports	• O.S.R. – Documentation File	5 years after student retires from school	• yes	• yes
Expulsion Letters	• O.S.R.	Minimum 5 years	• yes	• yes
Gifted Screening Results, Grade 4 – if based solely on OLSAT/Ross	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Grade 10 OSS Literacy Test	• O.S.R.	5 years after student retires from school	• yes	• yes
Health Information	• O.S.R.	Principal's discretion	• Principal's discretion	• Principal's discretion
I.E.P.'s (Individual Education Plans) and Parent Contact Records	• O.S.R. - Documentation File	All I.E.P.'s and Contact Records for 5 years after student retires from school	• yes	• yes
I.P.R.C. Invitation Letters	• O.S.R. - Documentation File (copy)	5 years after student retires from school	• yes	• yes

Description	Storage	Duration	Disposition	
			transfer within HDSB	transfer to another Ont. Bd.
I.P.R.C. Waiver Letters	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
I.P.R.C. Statement of Decision	• O.S.R. - Documentation File (copy)	5 years after student retires from school	• yes	• yes
I.P.R.C. Parental letter of request for meeting, discussion or appeal and Principal's Response Letter	• O.S.R. – Documentation File • copy to I.P.R.C. manager at J.W.S.	5 years after student retires from school	• yes	• yes
I.S.A. Status Form	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Learning Centre Program Report	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Letter requesting credit substitute	• O.S.R.	5 years after student retires from school	• yes	• yes
Report Card	• O.S.R.	5 years after student retires from school	• in O.S.R.	• in O.S.R.
Record of French Instruction	• O.S.R.	5 years after student retires from school	• in O.S.R.	• in O.S.R.
Request for name by repute	• O.S.R. – Documentation File	5 years after student retires from school	• yes	• yes
Requests for deletion/correction where request not granted	• O.S.R. – Documentation File	5 years after student retires from school	• yes	• yes
SALEP Reports	• O.S.R. – Documentation File	5 years after student retires from school	• yes	• yes
School Psychological Services Memo	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Special Support Program Report	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Surname change verification	• O.S.R. – Documentation File	5 years after student retires from school	• yes	• yes
Suspension Letter	• O.S.R.	• minimum of 1 year (may be removed at Principal's discretion) • 5 years after student retires from school	• yes	• yes
Suspension Letter with Violent Incident Form	• O.S.R. - Documentation File	5 years after student retires from school	• yes	• yes
Truancy/Frequent Absence Letters	• O.S.R.	Minimum 5 years	• yes	• yes
Violent Incident Form	• O.S.R. - Documentation File	Minimum 3years, additional incidents 5 years	• yes	• yes

OSR MAINTENANCE CHECKLIST

Elementary Schools – the following information can be used as a checklist:

- each student has an OSR
 - each student has a Halton student number and an Ontario Education Number (O.E.N.). These numbers are recorded on the OSR.
 - Part B of the OSR is completed
 - update Parts D, E, F, G, H and I, as necessary
 - all original copies or exact copies of the Provincial Report Cards for the school year are stapled together (final term on top) and placed into the OSR
 - once, for each division, an up-to-date student picture is dated and glued onto Part F of the OSR folder
 - a Documentation File has been established and the appropriate dated documents have been inserted. These inserts are to be organized chronologically with the most recent at the front. The following legal documents must be included:
 - Letters of Invitation to IPRC
 - IPRC Waiver Letters
 - IPRC Statements of Decision
 - ISA Status Form
 - IEP's and Parent Contact Forms
- Other appropriate dated documents to be filed in the Documentation File include:
- Educational, psychological and health assessments
 - Violent Incident Forms
 - Suspension Letters (if related to a Violent Incident Form)
 - Verification of change of surname
 - Verification of custody order
- a Student Record of Accumulated Instruction in French as a Second Language card has been established and updated for each student
 - items that are not conducive to the improvement of instruction are removed from the OSR, at the principal's discretion and shredded
 - name changes (refer to Section 10 of these procedures)
 - all items in OSR are dated
 - proof of age is verified and initialed
 - the OSR contents are filed in the recommended order

OSR MAINTENANCE CHECKLIST

Secondary Schools – the following information is used as a checklist when reviewing OSRs:

- each student has an OSR
- each student has a Halton student number and an Ontario Education Number (O.E.N.). These numbers are recorded on the OSR.
- Part B of the OSR is completed
- update Parts D, E, F, G, H, and I, as necessary
- all original copies or exact copies of the Provincial and Board Report Cards for the school year are filed together (final term on top) and placed into the OSR
- at least one photograph is dated and glued onto Part F of the OSR folder
- a Documentation File has been established and the appropriate dated documents have been inserted. These inserts are to be organized chronologically with the most recent at the front. The following legal documents must be included:
 - Letters of Invitation to IPRC
 - IPRC Waiver Letters
 - IPRC Statements of Decision
 - ISA Status Form
 - IEP's and Parent Contact Forms
- Other appropriate dated documents to be filed in the Documentation File include:
 - Educational, psychological and health assessments
 - Violent Incident Forms
 - Suspension Letters (if related to a Violent Incident Form)
 - Verification of change of surname
 - Verification of custody order
- items that are not conducive to the improvement of instruction are removed from the OSR, at the principal's discretion and shredded
- name changes (refer to Section 10 of these procedures)
- all items in OSR are dated
- proof of age is verified and initialed
- the OST is included, updated and filed at the beginning of the OSR
- the OSR contents are filed in the recommended order

Storage and Disposition of Documentation for Students Enrolled in Adult Day School and Alternative Education Programs

For students taking credit course at Summer School or Continuing education day school:

- **The OSR will remain in the last day school in which the student was registered**
- OIC information for all programs is stored electronically
- Summer School and Night School results are transferred to the last day school in which the student was registered if within the Halton board. Otherwise, the report card is distributed to the student who is responsible for delivery to their last day school to ensure that their OST is updated
- Upon graduation from one of these programs, ACE request the OSR from the day school. The records are updated and the OSR is stored in the ACE Administration secure area

For students who request a PLAR (Prior Learning Assessment and Recognition) a process for mature students is being developed.

Day School students who register in Summer School or Night School credit courses:

- The OSR will remain in the day school
- ACE will issue and send a report card to the day school. OST is updated electronically.

Ontario Student Record (OSR) Guideline, 2000

<http://www.edu.gov.on.ca/eng/document/curricul/osr/osr.html>

