

TASBO 2021 **Engage**

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ANNUAL CONFERENCE

PEIMS All Boxed Up

12/14/2020

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Your Presenters

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- I have been the PEIMS Coordinator and Records Retention Officer for 6 years now in Manor ISD.

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- Records Management Officer, New Caney ISD
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- I have been working for New Caney ISD for 18 years, RMO for 7 years.



Manor ISD Overview

Austin Area School District

Enrollment: 9322

Staff: 1412

Manor ISD **Educational Facilities** Include:

(3) High Schools

(3) Middle Schools

(9) Elementary Schools

And other specialized schools and centers

New Caney ISD Overview

Houston Area School District

Enrollment: 16,310

Staff: 2309



New Caney ISD **Educational Facilities** Include:

(3) High Schools

(4) Middle Schools

(9) Elementary Schools

And Other Specialized Schools & Centers

Growth:

New Caney ISD is growing at a rate of 7% per year!

Learning Objectives

- What documents and files should you keep.
- How long should you keep the documents and files.
- How should you keep the documents and files.

What do we do with what we have?

In our offices we have lots of paper and saved files, but what are we supposed to do with it all?



First - what is a record?

- A Record can be...
 - Something on paper
 - Electronic messages
 - Content saved on
 - Websites
 - Our computers
 - Servers
 - Flash drives
 - Document Management Systems
 - Audio
 - CD's

What is not a record?

- Extra identical copies of a document
- Notes, journals, and similar documents created for personal convenience
- Blank forms

How do we know what to keep?

And how long to keep it?



TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

<https://www.tsl.texas.gov/slrn>

Training is available by TSLAC

<https://www.tsl.texas.gov/slrn/blog/>

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What retention schedules does your district follow??

New Caney ISD and Manor ISD

- Follows the TSLAC retention schedules
 - GR: Records Common to All Local Governments
 - JC: Records of Public Junior Colleges
 - PS: Records of Public Safety Agencies
 - SD: Records of Public School Districts
 - EL: Records of Elections and Voter Registration

Now that we know the rules...

- Find your district records retention officer/manager
- Find out what your district's plan/procedure is
 - If the records are on paper
 - Who keeps what, where and for how long?
 - How is it kept?
 - In filing cabinets or in boxes?
 - Where is it located?
 - Do you have any fireproof cabinets?

Doing the impossible

Physical Inventory

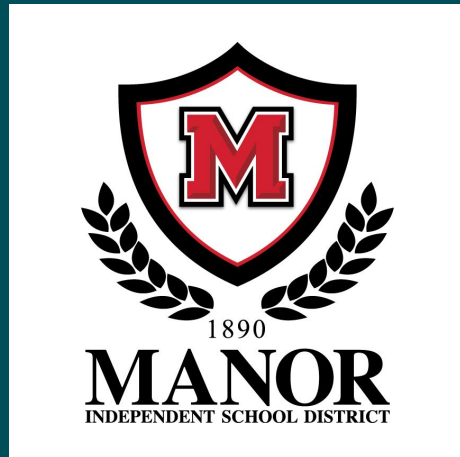
- When was the last physical inventory completed for the District?
 - Where are the boxes being stored on campus/departments
 - Did they check the attics?
 - Did they check behind the stage?
 - Did they check the mechanical room?
 - Did they check all storage rooms?
- As the RMO
 - Do a physical inventory of the entire district to find all areas where records could be stored
- <https://www.tsl.texas.gov/slrn/pubs/bulletinc#prep>

Now that we know the rules...

- If the records are electronic
 - Who takes care of the servers?
 - Who in your district manages the software?
 - If the records are stored off site, who are the vendors and contacts?
 - How can you get training and access to the records?
 - Who destroys the records electronically?
 - When and how often?
 - Do you have backups of the data
 - What security do you have?

If you are a paper and electronic district

like Manor ISD...



- Records are kept on campus for 5 school years after the school year the student withdrew.
- Records are then boxed up.
- Boxes are then sent to the district warehouse for storage, sorting, scanning, or destruction.
- Make arrangements with your vendor or district staff who do the actual sorting, scanning, and records destruction.

If you are an all electronic district

like New Caney ISD...



All Employee/Student records are stored electronically

- Advantages of being a electronic district
 - removed filing cabinets to the warehouse for to sell at auction
 - storage rooms were turned into offices and conference rooms
 - copy paper was moved to lock and key rooms
 - extra space
- Warehouse
 - Moved from 2 Records 12x12 rooms down 1/2 of a storage
 - Destroyed over 6000 boxes since 2015

If you are an all electronic district

like New Caney ISD...



- Student records are kept electronically for 5 school years after the school year the student withdrew.
- Records are purged and destroyed electronically by the RMO.
- The records that are scanned in by the registrar, attendance, nurses, etc are destroyed at the end of the year.

If you are an all electronic district

like New Caney ISD...



The process to send scanned paper records for destruction is

- Submit a disposition Log with Administrator signature to the Records department
- The box must have a storage label that matches the disposition log
- Send a work order for maintenance to pick up the boxes
- RMO handles all destruction for the district

Other things to think about.

- What are your plans when staff is moved from in office to remote overnight?
- Do you have everything required for a TREx request available electronically if you are working from home? (i.e. original HLS and parent permission form)
- Does everyone have technology and internet to do their jobs from home?
- What are your district protocols for staff using their personal devices for school business at home?

Thank you
for joining us
today.

