

IRVING

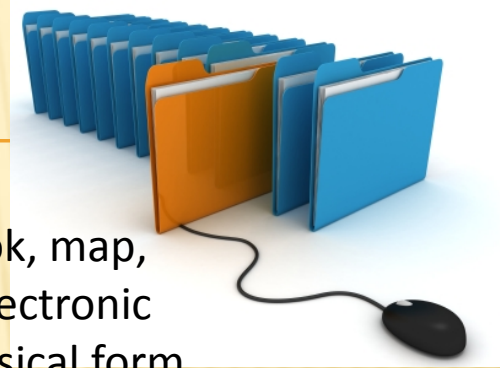
Independent School District

A Brief Overview - Campus

RECORDS MANAGEMENT 101



WHAT IS A DISTRICT RECORD?



"Local government record" means any document, paper, letter, book, map, photograph, sound or video recording, microfilm, magnetic tape, electronic medium, or other information recording medium, regardless of physical form or characteristic and regardless of whether public access to it is open or restricted under the laws of the state, created or received by the District or any of its officers or employee pursuant to law, including an ordinance, or in the transaction of public business. The term does not include:

- extra identical copies of documents created only for convenience of reference or re-search by officers or employees of the local government;
- notes, journals, diaries, and similar documents created by an officer or employee of the local government for the officer's or employee's personal convenience;
- blank forms;
- stocks of publications;
- library and museum materials acquired solely for the purposes of reference or display;
- copies of documents in any media furnished to members of the public to which they are entitled under Chapter 552, Government Code or other state law;
- any records, correspondence, notes, memoranda, or documents, other than a final written agreement described by Section 2009.054(c), Government Code, associated with a matter conducted under an alternative dispute resolution procedure in which personnel of a state department or institution, local government, special district, or other political subdivision of the state participated as a party, facilitated as an impartial third party, or facilitated as the administrator of a dispute resolution system or organization.

ARE YOU RESPONSIBLE FOR DISTRICT RECORDS?

“**Custodian**” means the appointed or elected public officer who by the state constitution, state law, ordinance, or administrative policy is in charge of an office that creates or receives local government records. *Local Gov’t Code 201.003(2)*



Custodian of Record

Maintain the records in their care and carry out the preservation, microfilming, destruction, or other disposition of the records in accordance with the policies and procedures of the District’s records management program. *CPC(Legal)*

The principal is custodian of records for active enrolled students. *FFL(Local)*

Penalty: Destruction or Alienation of Record

An officer or employee of a local government commits an offense if the officer or employee knowingly or intentionally violates this subtitle or rules adopted under it by destroying or alienating a local government record in contravention of this subtitle or by intentionally failing to deliver records to a successor in office as provided by Section 201.006(a). An offense under this section is a Class A misdemeanor. *Local Gov’t Code 202.008*

OTHER DEFINITIONS

Source or Official Record: A document possessing public records status, created or received by a district employee, while conducting district business and serving in an official capacity. This document type may be referred to as the source or primary copy or the matter of record copy and must follow the records management requirements. Official records may be disposed of only upon approval by the custodian of record and records manager, after the district has assured the records have met state records retention requirements.

Convenience Copy : a record that is provided as a courtesy copy or duplicate; that holds no record value to the holder and can be disposed of without any loss to official or business transaction.

Transitory Record: A document that has no administrative, operational, financial, legal or historic value in relation to public records requirements. Must confirm and designate as a non-official document, prior to their disposal.

Active Record: A record used on a daily, weekly, or monthly basis.

Inactive Record: A record rarely used, but must be retained for occasional reference or to meet audit or legal obligations.

Classification: The process of identifying and arranging records into categories according to logically structured conventions, methods and procedural rules.

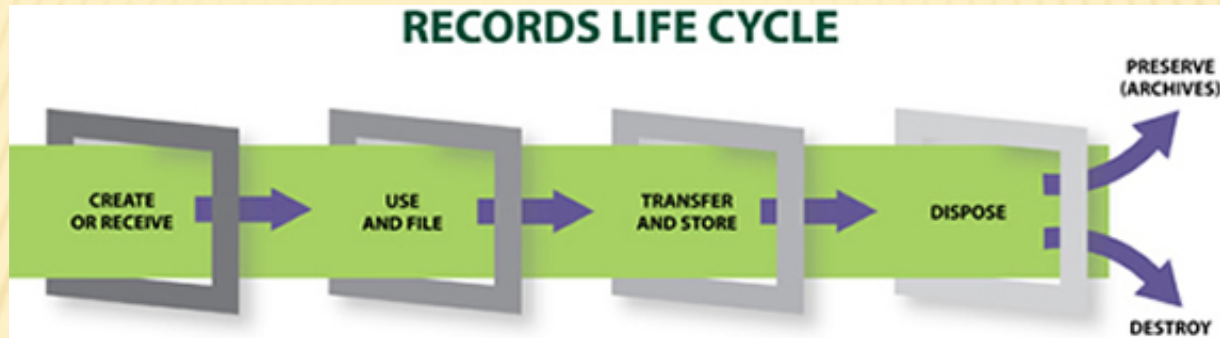
Disposal: The actions taken to fulfill the requirements outlined in appraisal reports and retention and disposal schedules to retain, destroy or transfer records. Note: that disposal is not synonymous with destruction, though destruction may be one disposal option.

Disposition: The disposal action taken regarding records no longer needed for current district business. Includes transfer to a storage facility, transfer to another department or agency, transfer to permanent archives, or destruction.

Records Schedule: Instructions for what to do with public records that are no longer needed for current district business. Also called a records retention and disposition schedule, it provides a minimum period of time that a specific type of record must be preserved.

Records series: a single record-type or group of related records that as a stand-alone or combined collection of documents represent a business function or process that documents that official business and its transactions.

IISD'S RECORDS MANAGEMENT PROGRAM

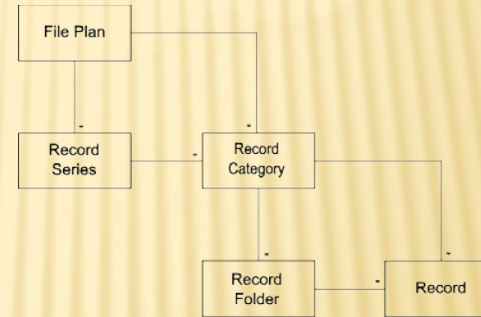


Best Practices:

1. Maintain all required records for the appropriate retention period (create a Quick List or request record series classification with Records Management). See *CPC (Legal & Local)*.
2. Develop internal record retention guidelines (in compliance with the district program procedures) and ensure communication of these guidelines to all employees. Records Management has tools to assist you, [Records Management](#).
 - Inform user that district records (paper or electronic including email), may be subject to disclosure under open record laws.
 - Ensure all work-related electronic data is archived and backed up.
 - Implement storing and purging information to appropriate staff.
 - Avoid keeping unnecessary records.
 - Ensure security of all records by limiting access to those who have a job-related need-to-know (for student records an "educational interest").

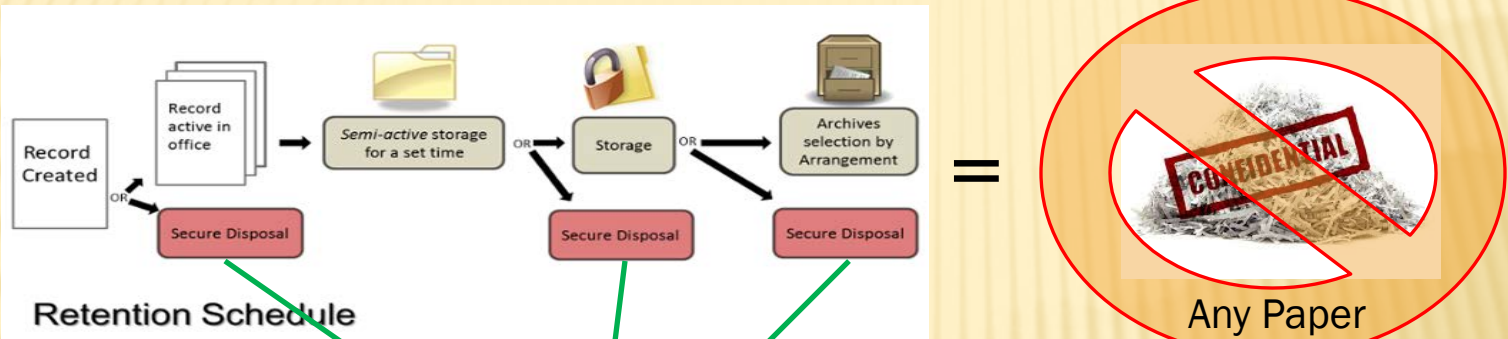
CLASSIFYING & IDENTIFYING DISTRICT RECORDS

1. You will need to inventory and categorize each of the records you retain to determine if you are in control of a source or convenience record. Then these records can be classified by their record series identified in the retention schedule(s). If you need assistance, contact Records Management to schedule a consultation or to establish a file plan.



2. The trigger of the record series determines when it becomes inactive and the beginning of the retention period. The trigger is a specific event or period of time (ie. date of termination, date of withdrawn, school year, calendar year, etc.)
3. Filing systems and archival boxes should be filed by record series and/or triggers (retention periods).
4. Once your records are inactive they can be scheduled for disposition, see additional slides.

DISTRICT SHREDDING PROGRAM



Welcome Irving ISD Work Order Request Page
To submit your request complete the following form.

See next page for additional details.



OR



**Boxes must clearly be marked "SHRED" or the approved disposition log must be attached to each box.

DOCUMENT WORK ORDER

Work Request

Welcome Irving ISD Work Order Request Page
To submit your request complete the following form.

Step 1 Please be yourself, click [here](#) if you are not Rosa Miranda Smith

First Name **Last Name** **Email**

Phone **Pager** **Mobile Phone**

Step 2 **Location**

Building

Area **Area/Room Number**

Yes, remember my area entries for my next new request entry.

Step 3 **Select Problem Type:**

Maintenance Help Desk:

Click [here](#) for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

Audio/Visual	Boiler	Carpentry	Construction
Custodial	Custodial Equipment Repair	Delivery	Document Management
Electrical	Electronic Door Access	Elevators	Energy Management System
Equipment Maintenance	Filters	Fire Alarm System	Food Services
General Maintenance	Glass/Window Repairs	Grounds	Grounds Equipment Repair
Heating/Ventilation /Air Conditioning	Indoor Air Quality	Key and Lock	Kitchen Equipment
Operations	P/A System	Painting	Pest Control
Plumbing	Process Management	Risk Management	Roof
Security	Security Camera	Sprinkler System	Supplies
Surplus	Telephone Service	Training	Utilities
Vehicle Maintenance	Warehouse		

Step 4 Please describe your problem or request.

Provide a detailed description (ie. empty console, pick-up #___ of shred boxes, disposition log attached, transfer log attached, etc.)

Step 7 Attachment
Attach New File (Maximum allowed is two attachments with a size of 3MB or less per file.)

Source records require approval (prior to SY2017 - Form 701-007).

- Form 769-007.1 – Disposition Log
- Form 769-007.2 – Transfer Log

BENEFITS OF PROPER RECORDS MANAGEMENT

Save Space



Remove records that have passed their retention date from storage areas and archives (on/off campus, in all media) and recycle, shred, or destroy them. Move records not required for daily operations or frequent reference, but which have not reached their disposition date, out of offices to storage areas and out of active electronic mailboxes to electronic archives.

Save Money

Avoid purchasing equipment, supplies, and disk space to file unneeded records. Use less expensive storage facilities for inactive records and release surplus filing equipment and space for reuse.



Save Time

Easily locate active records by removing inactive material from paper and electronic files.

Protect the District

Ensure that all legal, historical, fiscal, and administrative requirements are satisfied before records are destroyed.