Staff Policies

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Student Record Policy

Definitions

In this Student Records Policy, the following terms have the meanings set out below:

- **“Student”** means a prospective, current, or past student of Flex Academy.
- **“Parent”** means the parent, guardian, or other legal representative of a student.
- **”The School”** means Flex Academy.
- **“Student Record”** as defined in the Independent School Act and referenced in this policy, refers to a record of information in written or electronic form in respect to a student. It is the information located in a file that consists of parent and student demographics, medical concerns, discipline, and scholastic achievements.
- **“Permanent Student Record (PSR or 1704)”** means the official document that records the student’s education.
- **“Contact Information”** means the record of information from the parent(s) that includes the doctor’s contact information, medical concerns, authorized people that can pick up the student from school and authorized people for medical responses. All of this information is included in the student application.

Flex Academy prides itself on being an organization that follows the guidelines of PIPA (Privacy Information Protection Act) by protecting the confidentiality of information that flows within the school as well as information that is sent to any other organizations that are associated in the education field.

Authority

The Ministry of Education is the governing body that directs the guidelines of the storage and flow of information within the school and to other schools. Flex Academy falls within the authority of this governing body. The Ministry of Education acts as the adjudicating body for storage and transfer of student records, as per the Requirements and Best Practice Guidelines for Independent Schools.

Records

Each student digital file (in Encom) includes the following:

- Current Enrolment/Re-enrolment Form
- Legal Custody or Guardianship Documents

- Legal Residency Form
- Identification: Birth Certificate, Care Card number
- Permission & Release of Liability Form
- Permanent Student Record Card
- Current Medical documents (if any)
- Past Enrolments Forms
- Past Report Cards

Receiving of Records

A Student Records Request is used to request records from the student's previous school. Once received, records are digitized (if not already) and uploaded to Student's User Account in Encom.

Storage

All student files are located on a secure network drive. Access is restricted to only those employees who, by nature of their work, are required to see the student files. All required records will be kept for a period of not less than 55 years.

Transfer of Records

School will follow the guidelines outlined in the Best Practice Guidelines for Independent Schools, June 2012 Section IV.

Transferring of student records occurs when a request comes directly from the future institution. Confirmation from the parent or guardian must be obtained prior to the transfer.

All information in the file is transferred to the future institution with the exception of any letters, the signed form to release the records and a copy of the PSR. These items will remain in the student file at Flex Academy.

Administration Performance Evaluation Policy

Heads of School, Flex Directors and Flex School Leaders will be evaluated as they near the end of their first year of employment with Flex Academy. This evaluation will be comprised of two parts: Administrator’s Self-Evaluation and Supervisor's Evaluation. The two components will be summarized by the Supervisor and will be presented face-to-face with the Administrator.

A written summary will be submitted to be signed by both the School Leader and the Supervisor. The School Leader will keep one copy. A second copy will be placed in their HR file. School Leaders will be evaluated every second year.

School Leaders may be evaluated more frequently at the Supervisor's discretion. If concerns arise regarding their performance, the individual will be informed in writing that they will be evaluated sooner than scheduled.

Evaluation Policy

The Head of Schools, Chief Operating Officer, Flex Director, Assistant Directors, Teachers, Learning Coaches and Education Assistants are evaluated on a regular basis. Evaluations are intended to celebrate what staff are doing well, offer input and support for areas of growth, and ensure people feel seen and valued for their hard work at HCOS.

Evaluations for all positions are conducted by the staff person's direct supervisor, with the Head of Schools and Chief Operating Officer being evaluated by the KCCS Board of Directors.

School staff members are evaluated every second year. Supervisors have latitude for the timing of support staff evaluations, while school leadership positions will be generally evaluated in February and March, and teachers are evaluated in April and May (on five year cycles, after an evaluation the first year).

Recently-hired staff members who have a 90-day period review in their first year of employment do not need an additional review within the same calendar year. Their first regular evaluation can take place in their second year at HCOS, unless the supervisor feels it necessary to have one sooner.

Steps:

1. Staff member completes a self-evaluation
2. Supervisor completes a staff evaluation
3. A face to face meeting (on Zoom or in person) occurs, with accompanying notes documented and comments added if applicable
4. Evaluation meeting summary form is completed and signed by the supervisor and staff person
5. Evaluation forms are submitted to HR
6. Tracking spreadsheet is checked off signifying that the evaluation is complete

Supervisors may initiate an evaluation outside of the regular scheduled frequency at the Supervisor's discretion. The Head of Schools and/or Chief Operating Officer should be made aware of circumstances that may warrant an additional evaluation, and provide approval to ensure unbiased decision making. If so, the staff person will be informed in writing that they will be evaluated sooner than scheduled.

Personal Information Privacy Policy for Employees and Volunteers

The School’s Commitment to You

Safeguarding the personal information of employees and volunteers is a fundamental concern of Flex Academy. The school is committed to meeting or exceeding the privacy standards established by British Columbia’s Personal Information Protection Act (PIPA) and any other applicable legislation.

This Personal Information Privacy Policy describes the policies and practices of Flex Academy regarding the collection, use and disclosure of personal information about employees and volunteers, including the steps the school has taken to ensure personal and financial information is handled appropriately and securely.

Flex Academy may add, modify or remove portions of this Personal Information Privacy Policy when it is considered appropriate to do so, and any such changes will be effective upon giving notice of the revised policy. This Personal Information Privacy Policy may be supplemented or modified from time to time.

Ten Privacy Principles

As part of Flex Academy’s commitment, the Ten Privacy Principles govern the actions of the school as they relate to the use of personal information. This Personal Information Privacy Policy describes the Ten Privacy Principles and provides further details regarding Flex Academy’s compliance with the principles.

Definition

In this Personal Information Privacy Policy, the following term has the meaning set out below.

> “personal information” means any information about an identifiable individual, as further defined under British Columbia’s Personal Information Protection Act or other applicable laws. Personal information excludes the name, position name or title, business telephone number, business address, business email, and

> business fax number of an individual, as well as any publicly available information as designated under applicable laws, such as information available from a public telephone directory or from a public registry.

Principle 1 - Accountability

Flex Academy is responsible for maintaining and protecting the personal information under its control. In fulfilling this mandate, the school designates (an) individual(s) who is(are) accountable for the school's compliance with the Ten Privacy Principles. This individual is the Privacy Officer of the school.

You may contact our Privacy Officer as follows:

Flex Academy	
Attention:	Privacy Officer
Address:	905 Badke Road, Kelowna, BC V1X5Z5
Phone:	1-877-862-2375
Fax:	250-762-9277
Email:	privacy@flex.academy

Principle 2 - Identifying Purposes

What Information is Collected, Used and Disclosed?

Employees

Flex Academy collects, uses and discloses personal information about employees in order to establish, manage and terminate the employment relationship and for other purposes identified when the information is collected. Set out below are some examples of personal information about employees collected, used and disclosed by Flex Academy:

- personal information collected, used and disclosed in the hiring process, including information on resumes and application forms (contact information, personal and professional history, qualifications, emergency contact information) results of criminal records checks, information collected from references;
- payroll and related information including, social insurance number, rate of pay, hours of work, deductions, bank account information, any court orders;

- benefit information including social insurance number, premiums or contributions, coverage information, date of birth, marital status, dependent information, medical information;
- performance information, including work history, performance reviews, discipline and related notes and memorandums, documentation related to job qualifications (professional or technical qualifications), internal competition information;
- other personal information as required or permitted by law.

Volunteers

Flex Academy collects, uses and discloses personal information about volunteers for the purposes of recruiting volunteers and establishing and managing an effective volunteer program and for other purposes identified when the information is collected. Set out below are some examples of personal information about volunteers collected, used and disclosed by Flex Academy:

- information collected, used and disclosed in the recruiting process including information on resumes and application forms (contact information, personal and professional history, qualifications) and information collected from any references;
- information related to the volunteer's services, including availability, schedule, duties, reviews, and related notes and memorandums and documentation related to volunteer qualifications (professional or technical qualifications);

Principle 3 - Consent

Requirements for consent to collection, use or disclosure of personal information vary depending on circumstances and on the type of personal information that is intended to be collected, used or disclosed. In determining whether consent is required and, if so, what form of consent is appropriate, Flex Academy will take into account both the sensitivity of the personal information and the purposes for which Flex Academy will use the information. Consent may be express, implied (including through use of "opt-out" consent where appropriate), or deemed.

Most personal information is collected, used and disclosed for the purposes of establishing, managing and terminating the employment or volunteer relationship. In most cases, consent is not required. In other cases, consent will be sought or implied where it is reasonable to do so.

From time to time, Flex Academy may advise employees and volunteers of other purposes for which it will collect, use or disclose personal information, in which case the school will, if appropriate, obtain consent for collection, use or disclosure of that personal information.

Principle 4 - Limiting Collection

Flex Academy will limit the personal information collected to that information necessary for the purposes identified by the school.

Principle 5 - Use, Disclosure and Retention

Flex Academy will only use, disclose and retain personal information for the purpose for which it was collected unless the individual has otherwise consented or when its use, disclosure or retention is required or permitted by law.

How is Information Used?

Personal information about employees and volunteers is used for the purposes identified under Principle 2.

If for any reason personal information is required to fulfill another purpose, the school will notify the employee or volunteer of that purpose.

Flex Academy may use anonymous information, such as information collected through surveys or statistical information about employees and volunteers to improve the school's operations.

When May Information be Disclosed?

Flex Academy may disclose an individual's personal information to others in connection with the purpose for which it was collected, as consented to by the individual, or as required or permitted by law. Personal information about employees is disclosed to third parties for purposes related to the employment relationship, including to:

- government departments, bodies and agencies such as Canada Customs and Revenue Agency, Workers Compensation Board, Ministry of Education;
- payroll outsourcers; - financial institutions for payroll related purposes;
- insurance companies, benefit, group RRSP and pension plan administrators for enrollment in and administration of benefits, plans and claims;
- teacher certification information as per form I-2001 filed with the Ministry of Education;
- advisors to Flex Academy including accountants, lawyers and consultants;
- KCCS, the charitable society that oversees Flex Academy as reasonably required by the operations of Flex Academy and KCCS - when required or permitted by law.

Personal information about volunteers may be disclosed for the purposes of establishing and managing an effective volunteer program and for other purposes identified when the information is collected. Information may also be disclosed when required or permitted by law.

The school does not sell, lease or trade information about employees and volunteers to other parties.

Outside Service Suppliers

At Flex Academy, the school sometimes contacts outside organizations to perform specialized services such as printing, payroll services, market research or data processing. For example, the school gives its yearbook publisher the information required to produce the annual yearbook. Suppliers of specialized services are given only the information necessary to perform those services, and Flex Academy takes appropriate steps to ensure that such information is securely transferred and stored and is used only to fulfill the purposes for which it was disclosed to the

service provider.

Restricting Sharing Information

If an individual wishes to limit the sharing of personal information as permitted by law, the individual must submit to the Privacy Officer a written letter specifying which items of personal information are to be limited and to whom these items are to be restricted. The Privacy Officer will advise the individual whether the requested information can be restricted in the manner requested.

How Long Is Personal Information Retained?

Personal information will only be retained for the period of time required to fulfill the purpose for which it was collected. Once the personal information is no longer required to be retained to fulfill the purposes for which it was collected and is no longer required or permitted to be retained for legal or business purposes, it will be destroyed or made anonymous.

Principle 6 – Accuracy

Flex Academy will take appropriate steps to ensure that personal information collected by Flex Academy is as accurate and complete as is reasonably required in connection with the purposes for which it was collected, used or disclosed. Employees and volunteers are responsible for providing up-to-date personal information to the school.

How May I Update Outdated or Incorrect Information?

An individual may, upon written request to Flex Academy, request that Flex Academy correct an error or omission in any personal information that is under Flex Academy's control and Flex Academy will, as appropriate, amend the information as requested and send the corrected personal information to each third party to which it has disclosed the information during the preceding year.

Principle 7- Safeguarding Personal Information

Flex Academy will protect personal information by security safeguards that are appropriate to the sensitivity level of the information.

Employees and volunteers will be appropriately educated about the importance of privacy and they are required to follow the school's policies and procedures regarding handling of personal information.

An employee's failure to abide by school policies may result in discipline, up to and including termination of employment. A volunteer's failure to do so may result in termination of the volunteer relationship.

Employee Files

Employee files are stored in secured filing cabinets. Access to personal information is restricted to authorized employees who have a legitimate reason for accessing it.

Electronic Security

The school manages electronic files appropriately with passwords and security measures that limit access by unauthorized personnel. The school's security practices are reviewed periodically to ensure that the privacy of personal information is not compromised.

Principle 8 - Openness

Flex Academy will make information available to individuals concerning the policies and practices that apply to the management of personal information. Individuals may direct any questions or enquiries with respect to the school's privacy policies or practices to the Privacy Officer of Flex Academy.

Principle 9 - Individual Access

Flex Academy will inform an individual, upon the individual's request, of the existence, use and disclosure of the individual's personal information, and shall give the individual access to it in accordance with the law.

How May I Access My Personal Information?

An employee or volunteer may access and verify any personal information with appropriate notice so that the office is able to supply the information required.

Principle 10 - Complaint Process

Individuals may question compliance with the above principles.

Questions, Concerns and Complaints

Questions, concerns and complaints about privacy, confidentiality and personal information handling policies and practices of the school should be directed to the school's Privacy Officer as referenced above.

> For more information please see the Conflict Resolution and Appeal Policy.

Professional Development Policy

Flex Academy teachers and administrators are encouraged to participate in professional development on a yearly basis.

All teachers and staff are required to attend the RenewED Conference the week before the start of the school year.

In April, Flex Academy will host a professional development day (HCOS Connect) following the April Regional Teacher Meeting. Teachers are required to attend some or all of the afternoon and evening Connect events for families, primarily to engage with parents.

All teachers are also required to attend three school authority-wide Regional Team Meetings each year. Two are in person (November and April), and one is held online via Zoom (February). Regular staff meetings and professional development days will communicated by the Director of Flex Academy.

In addition, teachers may apply to attend various conferences and workshops in their area. If the sessions are relevant and applicable, registration funds may be provided.

Teacher Education Delivery and Services Evaluation Policy

New teachers will have their Education Delivery & Services evaluated as they near the end of their first year of teaching with Flex Academy. This evaluation will comprise teacher self-reflection, administration evaluation, and (if applicable) family observations.

Teacher evaluations occur annually on a first-year, fifth-year, and tenth-year basis.

> The Flex Academy Directors will summarize these components and will present them to the teacher.

A teacher's education delivery and services may be evaluated at the administration’s discretion. If concerns arise regarding the education delivery of a teacher, then that teacher will be informed in writing that their services will be evaluated that school year. Teachers may also request that their education delivery and services be evaluated.

Student Records Requirements and Best Practices Policy

> Note: For the purpose of this policy, the lead administrator in Flex Academy is the Head of Schools and/or Chief Operating Officer

HCOS is committed to ensuring that student records are handled in accordance with all legal requirements.

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

Policy Statements

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

HCOS will:

1.1 Ensure that the lead administrator 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.

1.2 Only collect, use or disclose personal information with the consent of the individual student or legal guardian, unless otherwise authorized under PIPA.

1.3 On or before collecting personal information, disclose to the individual student verbally or in writing the purposes for the collection of personal information.

1.4 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.

1.5 Secure Student Records and Student Files with access within the school authority restricted to those individuals who, by the nature of their work, are required to have access to the information.

1.6 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 lead administrator or designate.

1.7 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.

1.8 Inform parents that concerns, complaints and questions about personal information handling policies and practices of the school authority may be directed to the school's Privacy Officer by calling the school office.

2. Definitions and Student Record Components

2.1 Elements of the Student Record

1. The Permanent Student Record (PSR), as defined in the Students Records Order (I 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;
2. All documents listed as inclusions on Form 1704 (see 2.2 below);
3. Form A, verifying the information about the student's parent or guardian in respect of students eligible for funding (see Appendix I);
4. A copy of the student's current Student Learning Plan, if any; and
5. A copy of the student's current Individual Education Plan (IEP), if any.

2.2 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:

1. 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;
2. Court orders as indicated by the legal alert checkbox;
3. Other legal documents, e.g. name change or immigration document;
4. Support services information (e.g. psychometric testing, speech and hearing tests, adjudication requirements for completing assessment activities)
5. Current IEP and/or Case Management Plan (CMP) where applicable; and
6. Notification of a student being home schooled.

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

1. Records of information which an educator deems relevant and important to the educational program of the student;
2. Award information; and
3. Standardized test scores (if deemed relevant and important to the educational program of the student).

If the above optional inclusions are NOT listed on PSR Form 1704, then they may be included in the Student File (see section 2.3, viii below).

2.3 Student File

Additional items must (see i below) or may (see ii – viii below) be included in the school's student records as part of the Student File. These items include:

1. Student eligibility information (required):
   - Legal name of child – verify the original and file a photocopy or scanned copy of birth certificate or similar legitimate identification document;
   - Official name(s) of parent(s) or guardian(s) with home and work contact information; and
   - Verification that parent/guardian is legally admitted to Canada and a resident of BC (see Appendix I, Form A, used to collect this information);
2. Care Card number;
3. Emergency contact numbers;
4. Doctor's name and contact information;
5. Previous Student Progress Reports (other than the two most recent years required in the PSR)
6. Serious discipline reports (e.g. copies of letters to parents/guardians regarding discipline matters and corrective actions taken);
7. Reports of important meetings/discussions relating to the student; and
8. Standardized test scores, records of information which an educator deems relevant and important to the educational program of the student, and award information IF NOT listed as inclusions on the PSR (see section 2.2 above).

2.4 Sensitive Student Information

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

1. Psychiatric reports;
2. Family assessments;
3. Referrals to or reports from school arranged counselling services; or
4. Record of a school-initiated report of alleged sexual or physical abuse made to a child protection social worker under section 14 of the Child, Family and Community Service Act.

Procedures

3.1 The lead administrator or designate will be responsible for:

1. Updating the PSR Form 1704 as information changes and the student progresses through the system;
2. Ensuring that electronic copies of documents are stored on a server in a physically secure location. If information is accessed through the Internet, an encrypted connection (https://) must be established before authenticating. Access is restricted to those

employees (such as designated records clerks, administration, teachers, and counsellors) who, by the nature of their work, are required to have access; and
3. Ensuring that the school authority takes necessary precautions to safeguard against deprecated or obsolete forms of storage. The electronic storage of PSRs and other personal information requires the school authority to have an adequate backup plan and recovery strategy for potential hardware failure and database corruption.

3.2 Student Record and Student File Retention:

1. Student Records – Active Students
   - Original Student Records are locked in cabinets. All student records are scanned and digitized with back-ups stored off site. Access is restricted to those employees (such as designated records clerks, administrators, teachers, and counsellors) who, by the nature of their work, are required to have access.
   - 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 in sections 5 and 6 below.
   - The lead administrator or designate will regularly review Student Records to ensure that the information is current and complies with legal requirements. Required inclusions must be listed on the PSR – see section 2.2 above.
2. Student Records – Inactive Students
   - 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.
   - The archived Student Records are stored digitally and in a manner that ensures their preservation from calamity (fire, flood, etc.) Access is limited to the lead administrator or designate.
   - The designated records clerk keeps a record of Student Records that are destroyed (shredded) after 55 years.
3. Student Files – Active Students
   - Student Files are locked in cabinets in each school. Access is restricted to those employees (such as designated records clerks, administrators, teachers, and counsellors) who, by the nature of their work, are required to have access.
   - 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 in sections 5 and 6 below.
   - The lead administrator or designate will regularly review Student Files to ensure that the information is relevant and important to the educational program of the student.
4. Student Files – Inactive Students
   - The school authority archives Student Records for 55 years after the student has withdrawn and not enrolled in another K-12 school, or graduated from the school.
   - The archived Student Records are stored digitally and securely and in a manner that ensures their preservation from calamity (fire, flood, etc.) Access is limited to the administration or designate.
   - The lead administrator or designate is responsible for determining the relevancy of the contents in Student Records before being archived.

3.3 Currency of Student Records

Student eligibility information (see Appendix I) will be updated during student registration each year.

As stated above, the lead administrator or designate will regularly review Student Records and Student Files to ensure that the information is current and complies with legal requirements.

3.4 Security of Student Information Off Campus

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

3.5 Handling of Sensitive Student Information

Access to Sensitive Student Information is restricted to the lead administrator or a person or persons authorized by the lead administrator to access such information defined in section 2.4 of this policy.

The lead administrator or designate will obtain parental consent (written, dated and signed) for the collection, use and disclosure of Sensitive Student Information, including psychiatric reports and family assessments, and will store these as highly confidential documents with restricted access.

Sensitive Student Information will only be disclosed or transferred in accordance with the law.

The lead administrator is responsible for ensuring that school initiated reports under section 14 of the Child, Family and Community Service Act are retained only for the purpose of child protection proceedings and that information is not disclosed to third parties or transferred to other schools. Such reports are strictly confidential and should only be stored where the lead administrator or designate can access them.

4. Use of Student Personal Information

The school authority may use an individual student’s personal information for the following purposes, assuming that the school has disclosed such purposes to the individual student verbally or in writing on or before collecting the personal information:

4.1 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 the school authority.
4.2 To enable the authority to operate its administrative function, including payment of fees and maintenance of ancillary school programs such as parent voluntary groups and fundraising activities.
4.3 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.

5. Access to and Disclosure of Student Records

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

- Examine the Student Record and Student File kept by a school authority pertaining to that student, while accompanied by the lead administrator or designate to interpret the records; and
- Receive a copy of any student record upon request. The school authority 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 appropriate notice to the school administration. Access will be provided during school hours.

2. When applicable, graduating students will be provided with interim and/or final transcripts for Grades 10, 11 and 12 courses when graduating, and upon future request of the graduate. Copies will be mailed directly to institutions of higher learning or as requested by the graduate. The school authority reserves the right to assess a reasonable fee for transcript requests.

3. In the case of a request for personal student information from separated or divorced parents, the school authority will be guided by the legal custody agreement, a copy of which should be provided to the lead administrator. In cases where the lead administrator 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.

4. In addition to parents/guardians and students, access to student records should only be granted, upon assurance of confidentiality to:

a. professionals who are planning for, or delivering education, health, social or other support services to that student (consent not required for record access);
b. school authority's insurer to defend any claim/potential claim (consent for record access required).

6. Transfer of Student Records

1. 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 school authority will 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. The school authority will retain a copy of the PSR, indicating the school where the records have been sent and the date of the student record transfer.
2. 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).
3. 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.

4. The school authority will only transfer sensitive, confidential information (e.g. psychiatric 10 assessments) after dated and signed parent/guardian consent has been obtained.
5. 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.
6. 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.
7. A Student Record will be reviewed when a student transfers. The lead administrator will ensure that the documents listed as inclusions are still required inclusions (eg. 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.

List of Appendices

1. Appendix 1: Form A – Status of Parent/Guardian (Admission to Canada and Residency)
2. Appendix 2: Links to information on Student Record legislation:
   - PIPA
   - Independent School Act [RSBC 1996] Chapter 216
   - Independent School Regulation
   - Student Records Order
3. Appendix 3: Links to Student Record Policy:

   Student Records – Requirements and Best Practice Guidelines for Independent Schools, June 2012
4. Appendix 4: Link to the Child, Family and Community Service Act