



Administrative Directive 2.50.021-AD

Education Records Management

I. Student Education Records

- (A) Student education records are those records that are directly related to a student and maintained by the District, including academic, attendance, discipline, counseling, special education and accommodation records.

The following are not considered “student records”:

- (1) Records of instructional, supervisory and administrative personnel and educational personnel ancillary to those persons that are kept in the sole possession of the maker of the record and are not accessible or revealed to any other person except a temporary substitute for the maker of the record;
- (2) Records relating to an individual who is employed by the District that are made and maintained in the normal course of business, that relate exclusively to the individual in that individual’s capacity as an employee and that are not available for use for any other purpose. Records relating to an individual in attendance at the District who is employed as a result of their status as a student are education records and are not excepted under this section;
- (3) Records relating to a student who is 18 years of age or older, or is attending an institution of postsecondary education, that are:
 - (a) Made or maintained by a physician, psychiatrist, psychologist or other recognized professional paraprofessional acting in his/her professional capacity;
 - (b) Made, maintained or used only in connection with treatment of the student; and
 - (c) Disclosed only to individuals providing the treatment. For purposes of this definition, “treatment” does not include remedial educational activities or activities that are part of the program of instruction at the District.
- (4) Medical or nursing records that are made or maintained separately and solely by a licensed health care professional and which are not used for education purposes or planning.
- (5) Emails and text messages from District staff.

In addition to the administrative directive and the accompanying policy, students with disabilities and their parents have additional rights under federal and state law with regard to student education records. Those rights and procedures are included in the Special Education Manual located on the District website.



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- (B) The District shall keep and maintain a permanent record on each student which includes the
 - (1) Name and address of the educational agency or institution;
 - (2) Full legal name of the student;
 - (3) Student birth date and place of birth;
 - (4) Name of parent(s) and/or guardians(s);
 - (5) Date of entry in school;
 - (6) Name of school(s) previously attended;
 - (7) Courses of study and marks received;
 - (8) Data documenting a student's progress toward graduation;
 - (9) Credits earned;
 - (10) Attendance;
 - (11) Date of withdrawal from school; and
 - (12) Such additional information as the District may prescribe.
- (C) The District shall retain permanent records in accordance with state and federal law.

II. Rights of Parents and Eligible Students

- (A) The District shall annually notify parents and eligible students through the student registration form or any other means that are reasonably likely to inform the parents or eligible students of their rights. This notification shall state that the parent(s) or eligible student has a right to:
 - (1) Inspect and review the student's education records;
 - (2) Request the amendment of the student's education records to ensure that they are not inaccurate, misleading or otherwise in violation of the student's privacy or other rights;
 - (3) Consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that the applicable state or federal law authorizes disclosure without consent;
 - (4) Pursuant to OAR 581-021-0410, file with the United States Department of Education a complaint under 34 CFR Section 99.64 concerning alleged failures by the District to comply with the requirements of federal law; and
 - (5) Obtain a copy of the District policy with regard to student education records.



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- (B) The notification shall also inform parents or eligible students who have transferred out of the District that the District forwards education records requested by the new educational agency or school district within 10 business days of receiving the request. The notification shall also indicate where copies of the District policy are located and how copies may be obtained.
- (C) If the eligible student or the student's parent/guardian(s) has a primary or home language other than English, the District shall provide effective notice in the stated language.
- (D) These rights shall be given to all legal parents/guardians unless the District has been provided with specific written evidence that there is a court order, state statute or legally binding document relating to such matters as divorce, separation or custody that specifically revokes these rights.
- (E) When a student becomes an eligible student, which is defined as a student who (1) has reached 18 years of age or (2) is attending only an institution of postsecondary education and is not enrolled in a secondary school, the rights accorded to, and the consent required of, the parents/guardians transfer to the student.
- (F) Students who are eligible for McKinney-Vento services assume educational rights to access their educational records. [4.10.014-P](#)

III. Parent/Guardian's or Eligible Student's Right to Inspect and Review Records

- (A) The District shall permit an eligible student or student's parent/guardian(s) or a representative of a parent or eligible student, if authorized in writing by the eligible student or student's parent(s), to inspect and review the education records of the student unless the education records of a student contain information on more than one student. In that case, the eligible student or student's parent/guardian(s) may inspect, review, or be informed of only the specific information about the student.
- (B) The District shall comply with a request for access to a student's education record within a reasonable period of time, but in no case more than 45 days after it has received the request. Requests for special education and early intervention services records shall be provided within 10 business days.
- (C) The District shall respond to reasonable requests for explanations and interpretations of the student's education report.
- (D) The District shall not destroy any education record if there is an outstanding request to inspect and review the education record.



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- (E) While the District is not required to give an eligible student or student's parent(s) access to treatment records under the definition of "education records" in OAR 581-021-0220 (6)(b)(D), the eligible student or student's parent(s) may, at their expense, have those records reviewed by a physician or other appropriate professional of their choice.
- (F) If an eligible student or student's parent(s) so requests, the District shall give the eligible student or student's parent/guardian (s) a copy of the student education record. The District may recover a fee for providing a copy of the record, but only for the actual costs of reproducing the record. The District shall not provide the eligible student or student's parent/guardian(s) with a copy of test protocols, test questions and answers, or other documents described in Oregon Revised Statutes (ORS) 192.501(4), unless required by federal law.
- (G) The copying of student records may only be done by District staff on the premises of a District facility. The District may deny a request for a copy or copies of the education record when the District believes that a legitimate cause exists for such a denial, including but not limited to, a request to copy the education record that would require the original education record to be copied off District property or copied by an individual other than District personnel.
- (H) Fees for copies of education records may be charged unless the imposition of a fee effectively prevents a parent/guardian or eligible student from exercising the right to inspect and review the student education records. Any such fees will be established by the District to reasonably reimburse the District for actual costs of making copies of the education records. No fee will be charged to search for or retrieve the education records of a student.
- (I) The District will maintain a list of the types and locations of education records maintained by the District and the titles and addresses of officials responsible for the records.
- (J) All student education records will be maintained by the District's Records Management Department.

IV. Records Access: Non-Custodial Parent

- (A) When the school receives a request from a non-custodial parent to see their child's school records or obtain information from the records, and the school does not have prior knowledge regarding the identity of the person or whether there is a court order prohibiting them from receiving the information, release of information should be delayed to obtain confirmation of the noncustodial parent's identity and right to access the



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information. The school should inform the custodial parent:

- (1) Of the request;
 - (2) The date set for reviewing the record with the non-custodial parent;
 - (3) The fact that a parent by law has a right to review the records with the school.
- (B) Unless prohibited by court order, the District is required to release the educational record information to the non-custodial parent. In the event the staff has reason to believe that compliance with the request will be detrimental to the child or family member, the principal should seek further guidance from their supervisor and the District's legal counsel.
- (C) The fact of the record review and the communication with the custodial parent may be noted in the student's record.

V. Records Access: Department of Human Services (DHS)

- (A) Department of Human Services (DHS) is entitled to access and copies of student records as follows:
- (1) When a minor is declared a ward of the court, DHS is normally appointed the "legal custodian" and the caseworker issues a "Letter of Notification" to the school that the minor attends. This "Letter of Notification" is the school's authorization to release student records and information to an authorized representative of DHS as "guardian;"
 - (2) DHS Investigations Before Court Action. When investigating the circumstances of a child for whom DHS has not been appointed guardian, DHS may obtain regular and special education information and records for use in court by obtaining parent or surrogate consent or, in the absence of such consent, a subpoena or an order from the court.
 - (a) If the District receives a subpoena for records (subpoena duces tecum), the records are copied and the copy is sent to the court – not DHS. If the District receives a court order directing disclosure of records to DHS, the records will be copied and the copies sent to DHS.
 - (b) If a subpoena is received for the testimony of a staff member, staff should phone the DHS caseworker or the Deputy District Attorney to determine if there is anything that will be helpful and to get an exact date and time for appearance in court. Testimony is to be given in court – not



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to the DHS caseworker or the attorney.

- (c) District staff should notify the General Counsel's office when a subpoena requesting staff appearance is received. The principal may wish to seek help from the District's General Counsel's office in reducing or controlling the staff time used by the appearance.

VI. Release of Personally Identifiable Information

- (A) Personally identifiable information shall not be released without signed and dated consent of the eligible student or student's parent/guardian(s) except in the following cases:
 - (1) The disclosure is to other school officials, including teachers, within the District who have a legitimate educational interest. As used in this section, those having a "legitimate educational interest" means:
 - (a) A licensed staff member having the student in class, the student's counselor or other licensed or non-licensed staff due to special referral or participating in staffing, programming or case review of a specifically named student;
 - (b) Selected agency personnel contracting with the District for services to students, and their families, but only if the contract specifically limits the use of records and information and requires that the confidentiality be maintained according to federal and state law pertaining to confidentiality of student education records.
 - (2) The disclosure is to officials of another school within the District;
 - (3) The disclosure is to authorized representatives of:
 - (a) The Comptroller General of the United States;
 - (b) The Attorney General of the United States;
 - (c) The Secretary of the United States Department of Education;
 - (d) State or local educational authorities; or
 - (e) The Oregon Secretary of State's Audit Division.
 - (4) The disclosure is in connection with financial aid for which the student has applied or which the student has received, if the information is necessary for such purposes as to:
 - (a) Determine eligibility for aid;



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- (b) Determine the amount of aid;
 - (c) Determine the conditions for the aid; or
 - (d) Enforce the terms and condition of the aid.
 - (e) As used in this section “financial aid” means any payment of funds provided to an individual that is conditioned on the individual’s attendance at an educational agency or institution.
- (5) The disclosure is to organizations conducting studies for, or on behalf of the District to:
- (a) Develop, validate or administer predictive tests;
 - (b) Administer student aid programs; or
 - (c) Improve instruction.
 - (d) The District may disclose information under this section only if:
 - (i) The study is conducted in a manner that does not permit personal identification of parents or students by individuals other than representatives of the organization that have legitimate interests in the information; and
 - (ii) The information is destroyed when no longer needed for the purposes for which the study was conducted.
 - (iii) For the purposes of this section, the term “organization” includes, but is not limited to, federal, state and local agencies, and independent organizations.
- (6) The disclosure is to accrediting organizations to carry out their accrediting functions;
- (7) The disclosure is to comply with a judicial order or lawfully issued subpoena. The District may disclose information under this section only if the District makes a reasonable effort to notify the eligible student or student’s parent(s) of the order or subpoena in advance of compliance;
- (8) The disclosure is to the parent(s) of a dependent student, as defined in Section 152 of the Internal Revenue Code of 1986;
- (9) The disclosure is in connection with a health or safety emergency. The District shall disclose personally identifiable information from an education record to law enforcement, child protective services, and health care professionals, and other appropriate parties in



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connection with a health and safety emergency if knowledge of the information is necessary to protect the health and safety of a student or other individuals.

- (a) As used in this section, a “health or safety emergency” includes, but is not limited to, law enforcement efforts to locate a child who may be a victim of kidnap, abduction or custodial interference and law enforcement or child protective services efforts to respond to a report of child abuse or neglect pursuant to applicable state law.
- (10) The disclosure is to the parent(s) of a student who is not an eligible student or to an eligible student;
- (11) The disclosure is to officials of another school, school system, institution of post-secondary education, an education service District (ESD), state regional program or other educational agency that has requested the records and in which the student seeks or intends to enroll or is enrolled or in which the student receives services. The term “receives services” includes, but is not limited to, an evaluation or re-evaluation for purposes of determining whether a student has a disability; or
- (12) The disclosure is to the Board during an executive session pursuant to ORS 332.061.

VII. Release of Directory Information

- (A) Directory information is defined by the Family Educational Rights and Privacy Act (FERPA) as information contained within an education record of a student that would not be generally considered harmful or an invasion of privacy if disclosed. Under this Act, the District may disclose designated directory information without parental or eligible student consent. The District is not required to release directory information.
- (B) The District has designated the following as Directory information: student name, major field of study, participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, degrees and awards received, and the most recent previous school attended.
- (C) Before disclosure of Directory Information, the parents will be given notice of the categories of information to be released under this provision and be advised of their or the eligible student’s right to prohibit, in writing, the release of such information until the student reaches the age of 21. Notice may be included on the Student Registration Form, the Annual Verification Form, or the Handbook on Student Responsibilities, Rights and Discipline.



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VIII. Record Keeping Requirements

- (A) The District shall maintain a record of each request for access to and each disclosure of personally identifiable information from the education records of each student. Exceptions to the record keeping requirements shall include the parent, eligible student, school official or his/her assistant responsible for custody of the records, parties authorized by state and federal law for auditing purposes and other persons or organizations for whom prior written consent is not required for disclosure. The District shall maintain the record with education records of the student as long as the records are maintained. For each request or disclosure, the record must include:
 - (1) The party or parties who have requested or received personally identifiable information from the education records; and
 - (2) The date access was given; and
 - (3) The legitimate interests the parties had in requesting or obtaining the information.
- (B) The following parties may inspect the record of request for access and disclosure to a student's personally identifiable information:
 - (1) The parent(s) or eligible student;
 - (2) The school official having a legitimate educational purpose for access to the records;
 - (3) Those parties authorized by state or federal law for purposes of auditing the record keeping procedures of the District.

IX. Request for Amendment of Student's Education Record

- (A) If an eligible student or student's parent/guardian(s) believes the education records relating to the student contain information that is inaccurate, misleading or in violation of the student's rights of privacy or other rights, he/she may request in writing that the building level principal or administrator where the record is maintained to amend the record.
- (B) The administrator shall decide, after consulting with the necessary staff, whether to amend the record as requested within a reasonable time after the request to amend has been made.
- (C) The request to amend the student's education record shall become a permanent part of the student's education record.
- (D) If the administrator decides not to amend the record as requested, the eligible student or the student's parent/guardian(s) shall be informed of the decision and of their right to appeal the decision by requesting a



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hearing. The eligible student or student's parent/ guardian(s) has the right to insert written comments or explanations into the student's education record regarding the disputed material.

X. Hearing Rights of Parents or Eligible Students

- (A) If the building level administrator decides not to amend the education record of a student as requested by the eligible student or the student's parent /guardian(s), the eligible student or student's parent/ guardian(s) may request a hearing for the purpose of challenging information in the education record as inaccurate, misleading or in violation of the privacy or other rights of the student. The District shall appoint a hearings officer to conduct the hearing requested by the eligible student or student's parent/ guardian(s). The hearings officer will establish a date, time and location for the hearing. The hearing will be held within 10 working days of receiving a written request for the hearing.
- (B) The parent/ guardian(s) or eligible student may, at their own expense, be assisted or represented by one or more individuals of their own choice, including an attorney. The hearings officer shall make a determination after hearing the evidence and make its recommendation in writing within 10 business days following the close of the hearing. The findings shall be rendered in writing not more than 10 business days following the close of the hearing and submitted to all parties.
- (C) If, as a result of the hearing, the decision is that the information in the education record is not inaccurate, misleading or otherwise in violation of the privacy or other rights of the student, the hearings officer shall inform the eligible student or the student's parent/ guardian(s) of the right to place a statement in the record commenting on the contested information in the record or stating why they disagree with the decision of the hearings officer. If a statement is placed in an education record, the District will ensure that the statement:
 - (1) is maintained as a part of the student's records as long as the record or contested portion is maintained by the District; and
 - (2) is disclosed by the District to any party to whom the students' records or the contested portion are disclosed.
- (D) If, as a result of the hearing, the decision is that the information is inaccurate, misleading or otherwise in violation of the privacy or other rights of the student, it shall:
 - (1) Amend the record accordingly; and
 - (2) Inform the eligible student or the student's parent(s) of the amendment in writing.



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XI. Duties and Responsibilities When Requesting Education Records

- (A) The District shall, within 10 business days of a student seeking initial enrollment in or services from the District, notify the public or private school, ESD, institution, agency, detention facility or youth care center in which the student was formerly enrolled and shall request the student's education records.

XII. Duties and Responsibilities When Transferring Education Records

- (A) The District shall, subject to ORS 339.260, transfer copies of all requested student education records, including any ESD records, relating to the particular student to the new educational agency when a request to transfer the education records is made to the District. The transfer shall be made no later than 10 business days after receipt of the request. Readable copies of the following documents shall be retained:
 - (1) The student's permanent records, for one year;
 - (2) Such special education records are necessary to document compliance with state and federal audits, for five years after the end of the school year in which the original was created. In the case of records documenting speech pathology and physical therapy services, until the student reaches age 26 or five years after last seen, whichever is longer.

XIII. Retention of Records

All records will be scheduled and minimum retention periods met before they are destroyed. Questions regarding the retention of records not included in Oregon's Records Retention Schedule should be directed to the District's Records Management Department.

Policy and Legal Reference: [2.50.020-P](#) Education Records

FERPA 34 CFR Part 99; ORS 192.501; ORS 326.575; ORS 332.061; OAR 581-021-0220; OAR 581-021-0225; OAR 581-021-0250; OAR 581-021-0410;

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