



## Office of School Counseling

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### Mass Transfer of Student Records to Middle OR High School SY23/24

The process for transferring records has been standardized. Schools should utilize the **PREPARE > COMPILER > SEND** process outlined below to complete the mass transfer of records. Please share this document with the staff responsible for preparing and receiving the student records.

#### **Step 1: Prepare**

Identify student files to transfer: eSchoolPLUS > Cognos Reporting > Folder: Next Year > Next Year Mass Transfer of Student Records – Out/In Student Files

#### **Note:**

- eSchoolPlus Geo-coding only sets Building of Residence based off current year attendance area. Be sure to double check this field in case the student address is not found in an attendance area. Make certain all information on the Next Year tab of the Registration Screen is complete and accurate. Set the next building to the correct school.
- If a student is currently on a boundary exception, but is not approved for next year, set the next building field to the school that the student would normally attend if the student were not on the boundary exception. At the termination of the boundary exception, there would be a summer withdrawal back to the home school. If you have documentation that a boundary exception has been approved for the next school year, set the next building field to the approved boundary exception school. For Override Building of Residence choose “R-Needs Review”; for Override Reason choose “BE”.

#### **Step 2: Compile Cumulative Contents**

- The sending and receiving department(s) should be clearly marked on the boxes.

#### **Step 3: Send**

- Send the folders (en masse according to folder type) using the *Mass Transfer of Records within HCPS* template (included in this document). Include the *Cognos* report checklist.

### Converted MSDE Student Record Cards

The district has completed the process of converting the MSDE hard cards into digital media and realize that it may take several years for existing hard cards to work their way out of the system through standard MSDE record retention guidelines.

1. If a student file contains MSDE hard cards that were created **prior** to the release of OSCAR on January 9, 2017, the hard cards should remain in the cumulative file and transferred to the receiving HCPS middle or high school.
2. The district has eliminated all handwritten annual updates and grade/testing label placements on the hard cards that have been converted.
3. Do not print digital cards to include in the mass transfer process to another HCPS school.
4. There is no change in practice for non-converted hard cards (SR5).

SR Card #	Converted MSDE Student Record Cards
1	Personal Data & School Attendance Data <ul style="list-style-type: none"> <li>• Verify the student's electronic address matches the current Proof of Residency on file.</li> <li>• If a physical card exists (created prior to OSCAR), the current and prior Proof of Residency documents must be clipped to the physical card.</li> <li>• If a physical SR1 does not exist (due to the digital record conversion for students enrolled after January 9, 2017), the Proof of Residency should be clipped to the HCPS Gold Registration Card.</li> </ul>
2 - Side 1	Annual Early Childhood School Performance
2 - Side 2	Annual Middle School Performance
3	Annual Secondary School Performance Data Summary
3A	Supplemental Testing
3B	Maryland High School Assessment Performance
4	Maryland State Assessments Results
7	Maryland Student Exit Record <ul style="list-style-type: none"> <li>• If a student has a prior exit, a copy of the completed SR7 is required to be kept in the cumulative folder for 3 years.</li> </ul>
	<b>Non-Converted Cards</b>
5	Health Screening (1702541 Yellow)
	HCPS Student Registration Card(s) (1702490 Gold)
<b>Additional elements to transfer:</b> <ul style="list-style-type: none"> <li>• Discipline Records - includes suspension letters (in and out-of-school), as well as other disciplinary action including, but not limited to: office referrals, bus suspensions, detentions, exclusions/removals, etc.</li> <li>• Special Education - IEP, meeting summaries/reports, assessment reports, etc.</li> <li>• Confidential information - 504 team records, psychological testing, etc.</li> <li>• SST-D Intervention Plan (include minutes)</li> <li>• Health information</li> <li>• Legal documents</li> <li>• Academic progress</li> <li>• Testing information</li> <li>• Birth certificate and social security card (copies)</li> </ul>	

### **Release of Records Information:**

Unless you have a request for records from another receiving school, forward complete and accurate student records to the feeder middle or high school. Each student has one record, even if the information is kept in separate folders, and all student records are equally confidential!

#### **Q. What should I do if a request for records is received PRIOR to the mass transfer of records?**

*If a request for records is received prior to the mass transfer of records, the current school is responsible for fulfilling the request. All records of exited students are to be maintained at the last school of attendance.*

#### **Q. What should I do if a request for records is received AFTER the folders have transferred?**

*The receiving middle or high school will be responsible for making the appropriate copies and forwarding the records to the school where the student has registered.*

*The student's records, either original or copy, along with the request for records, will then be returned to the sending school. All records of exited students are to be maintained at the last school of attendance.*

#### **Q. What should I do if a transfer is to another public school in Maryland?**

*The **Exit Package by Level** can be found on > **SharePoint** > **Student Services** > **School Counseling folder** > **OSCAR folder***

#### **Q. What should I do if a transfer is to an out-of-state school or non-public school?**

*Please refer to the **Exit Package by Level** referenced above.*

#### **Q. What elements comprise a Student Record?**

*The following elements comprise of a student record and should be forwarded when a request for records has been received:*

- Identifying information
- Enrollment information including residency, entries and exits, and attendance
- Testing information
- Health information
- Academic progress
- Discipline information
- Confidential information – 504 team records, psychological testing, etc.
- SST-D Intervention Plan (including minutes)
- Special Education – IEP, meeting summaries/reports, assessment reports, etc.
- Legal documents
- Information for English Language Learners

#### **Q. What elements are not considered part of the Student Record?**

*The following elements are not considered part of the student record and should not be sent when a request for records has been received. Additionally, these elements should not be part of the mass transfer.*

- Reportable Offense or Criminal Records
- Child Abuse and Neglect Records
- MSAP (Maryland Student Assistance Program)
- Bullying and Harassment Forms
- Reports of Gang Related Activity (Safe Schools Act 2010) if the report is created by law enforcement

#### **Q. What are the requirements for records retention?**

*School Registration Cards and all remaining MSDE student hard cards should stay in the cumulative folder until the student is twenty-one years of age. The digital SR1 and SR3 will be permanently auto-archived. Special Education/Section 504 files (IEP, meeting summaries/reports, medical assistance records, and assessment reports) must be retained for six (6) years following the student's dismissal from Special Education services.*

**Q. Should I prepare the SR7 for each student included in the mass transfer?**  
*Please refer to the chart below.*

Standard Exit	HCPS Mass Transfer of Records via Matriculation	Summer Exit (excludes Matriculation)
REQUIRED	NOT REQUIRED	REQUIRED
If the exit is within two (2) weeks from the receipt of a report card, and new exit grades do not exist, it is acceptable to write "Report Card Attached".	The SR7 is not required to be completed for this project.	In the "Current Instructional Box", write "Summer Exit".

**Please direct questions to:**  
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***End of School Year  
Mass Transfer of Records within HCPS***

Use this form to mass transfer student records within Harford County Public Schools.

	<b><i>SENDING SCHOOL</i></b>	<b><i>RECEIVING SCHOOL</i></b>
<b><i>School Name</i></b>		
<b><i>Department</i></b>		
<b><i>Phone</i></b>		

- ☐ Cumulative
- ☐ Confidential (IEP/504 team records, psychological testing, etc.)
- ☐ Health
- ☐ Psychological
- ☐ Discipline
- ☐ Special Education
- ☐ Other \_\_\_\_\_

**Sending School:** Please attach a list of student records being transferred.

**Receiving School:** Please verify that you have received all records as indicated in the attachment.

\_\_\_\_\_  
Signature (Name of person delivering records) Date

\_\_\_\_\_  
Signature (Name of person receiving records) Date