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2 This charge is authorized by Section 119.07(4)(d), Florida Statutes, and Department of State Rule 1-2.0031(2)(a), Florida Administrative Code, which is entitled “Public Records Requests: Special Service Charge.” ................................................................. xviii

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INTRODUCTION

The rationale for records management is to control and manage records throughout their lifecycle – from creation through active use, inactive storage, and final disposition. Benefits of these procedures include space savings, reduced expenses for filing equipment, efficient information retrieval, and protection of vital and historical records.

Purpose

Brevard Public Schools (BPS) recognizes and embraces the Public Records Law and government in the sunshine. The purpose of this manual is to provide BPS’ employees with the information necessary to understand and carry out their responsibilities and to ensure compliance with the Public Records Law and the records retention requirements established by the Florida State Archives and Records Management Program under the direction of the Division of Library and Information Services, Department of State.

Scope

These procedures apply to all BPS employees, as well as publicly created advisory boards and private organizations (e.g. Brevard Schools Foundation), that have been delegated the authority to perform some district function. These procedures apply to all public records of the district regardless of the medium in which they exist (e.g. paper, electronic, or other).

Public Records Requests

The records that Florida’s state and local government agencies keep in the course of carrying out their duties and responsibilities are public records. Public records are different from records of businesses and private organizations because Florida law requires public records to be readily accessible and available to the public upon request. Florida, which has had some form of a public records law since 1909, has one of the most open public records laws in the country.

BPS provides access to public records in accordance with Chapter 119, Florida Statutes. All employees must ensure that public records in their custody are maintained and accessible as required by Florida law. Employees and agencies do not have the authority to withhold records deemed “sensitive.” The only records that can be withheld from public disclosure are those specifically designated by the Florida Statutes as confidential or exempt. This manual provides basic information for employees on how to respond to public records requests.

Records Management Program

The District has an active records management program and utilizes State Records Retention Schedules for disposition of its records. Annually, the Director of Communications and/or the Records Management Liaison Officer prepares a compliance form, which is signed by the Superintendent and submitted to the Department of State, Bureau of Archives and Records Management.
This manual will assist District departments with conducting a records inventory, identifying a record series, determining the retention schedule, and determining final disposition of its records. Final disposition simply means the records are eventually stored, destroyed, or imaged.

Each department/division should designate a records coordinator who works with the Director of Communications and/or Records Management Liaison Officer to ensure that all public records are maintained and preserved according to Florida Statutes. Employees are required to work through their records coordinator before disposing of any records. Employees may contact the Office of District Communications; however, the first contact should be with the department/division records coordinator.

Each department senior staff member or designee is responsible for protecting the integrity of their records, ensuring that the policies and procedures in this manual are followed, and informing personnel of its content.

**Comments**

Comments, suggestions and questions about the content of this manual should be directed to the Director of Communications.

**LEGAL AUTHORITY**

**Section 119.01, Florida Statutes**

It is the policy of the state that all state, county, and municipal records are open for personal inspection and copying by any person. Providing access to public records is a duty of each agency.

**Section 257.36, Florida Statutes**

Creates a records and information management program within the Department of State, Division of Library and Information Services (“Division”). As required by Statute, the School Board of Brevard County is required to:

- Cooperate with the Division in complying with the provisions of the Statute.
- Designate a Records Management Liaison Officer.
- Establish and maintain an active and continuing program for the economical and efficient management of records.

A public record may be destroyed or otherwise disposed of only in accordance with retention schedules established by the Division.

**School Board Policy 8310 – Public Records**

The Board recognizes its responsibility to maintain the public records of this District and to make such records available for inspection and reproduction.
School Board Policy 8330 – Student Records

In order to provide appropriate educational services and programming, the Board must collect, retain, and use information about individual students. Simultaneously, the Board recognizes the need to safeguard students' privacy and restrict access to students' personally identifiable information.

School Board Policy 8350 – Confidentiality

It is the policy of the Board that when the District receives in trust from a public agency information identified as confidential (whether such information is confidential by Florida law, Common Law Privilege, Case Law, or Federal Law), the District will maintain the confidentiality of said information to the maximum extent permitted by the law.

DEFINITIONS

Public Records. The District uses the term “public records” as defined in Section 119.011, Florida Statutes:

(12) "Public records" means all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

A benchmark in defining public records is an important legal case that came before the Florida Supreme Court in 1980. In Shevin v. Byron, Harless, Schaffer, Reid and Associates, (379 So. 2d 633 Fla. 1980), the Court ruled that a public record:

...is any material prepared in connection with official agency business which is intended to perpetuate, communicate, or formalize knowledge of some type...

Therefore, any document that is intended to perpetuate, communicate or formalize knowledge is a public record regardless of whether it is in final form or is designated by the agency as a draft, working copy, or preliminary version. If an agency has circulated a “draft” document for review, comment or informational purposes, that document is a public record.

Records Management Liaison Officer. Section 257.36 of the Florida Statutes requires the Superintendent to appoint a Records Management Liaison Officer. The Director of Communications has been appointed as Brevard Public Schools Records Management Liaison Officer for all District records.

Records Management Specialist. An employee in the Office of District Communications responsible for administering the District’s records program under the direction of the Director. This person is responsible for the day to day activities,
including the in-house imaging program, guidance on use of the General Records Schedules, disposition of records, and storage/retrieval of records from the off-site storage facility.

**Records Coordinator.** Each department/division should appoint a records coordinator. This person must be knowledgeable about the records in his/her work area. The records coordinator will work with the Records Management Specialist on the inventory and disposition of that department’s or division’s records.

**Confidential.** Any public records identified in the Florida Statutes as confidential. The information in these records is not subject to inspection by the public and may be released only to persons and entities designated in the statute.

**Department of State Individual Records Schedules.** Individual retention schedules for records that are unique to the Department of State. The Department of State individual records schedules are available on the Department of State’s Intranet at [http://dlis.dos.state.fl.us/recordsmgmt/gen_records_schedules.cfm](http://dlis.dos.state.fl.us/recordsmgmt/gen_records_schedules.cfm).

**Exempt.** Public records that have been identified in Chapter 119 or other applicable Florida Statutes as exempt from public disclosure.

**GS1-SL and GS7.** The General Records Schedules for the school district are available on District Communications’ Intranet at [http://districtcommunications.brevardschools.org/RecMgt/GeneralSchedules_index.htm](http://districtcommunications.brevardschools.org/RecMgt/GeneralSchedules_index.htm).

**Inactive Records.** Records which have lost some of their value or have been superseded by new records, but have not reached their specified retention. Records that are referenced less than once per month are usually considered inactive.

**Record (Master) Copy.** As defined in Rule 1B-24.001(3)(i), Florida Administrative Code, means the public records specifically designated by the custodian as the official record.

**Record Series.** As defined in Rule 1B-24.001(3)(k), Florida Administrative Code, means a group of related documents arranged under a single filing arrangement or kept together as a unit because they consist of the same form, relate to the same subject, result from the same activity, or have certain common characteristics.

**CLASSIFICATION OF PUBLIC RECORDS**

Records created or received in connection with the transaction of Brevard Public Schools business are public and may be classified as follows:

**Record Copy or Master Copy.** A public record designated as the official record. The record/master copy is the record created by the sender or initiator, or the record received by the recipient from an outside source.
The person who initiates the record or who receives the record (or file or message) has the responsibility for ensuring compliance with records retention requirements.

The following example applies to a record initiated in the District: The Board secretary prepares and distributes Board meeting minutes. The copy filed in her records is the record/master copy. The copies distributed to the various departments are considered duplicate or convenience copies.

**Duplicate or Convenience Copy.** Reproductions of the master copy, which are not designated as the official copy. Duplicate or convenience copies are transitory in nature, generally with short-term administrative value to the District.

**Precursors.** Precursors to a public record may be thought of as drafts. Precursors are not public records; however, they should not be confused with support documents. Support documents or working papers are public records. Working papers support the final intended record product, whereas drafts precede the final intended record product. In the absence of a final intended record product, drafts are public records.

For example, the Board secretary prepares draft Board meeting minutes on the computer at a Board meeting. The draft minutes are not used to perpetuate, communicate, or formalize knowledge. (They are not distributed to staff or Board members in draft format to solicit comments). In this case, the draft minutes are not considered a public record. However, the agenda package (working papers and support documents) is a public record. If the Board Secretary never prepares the final set of minutes from her draft, her draft would become the final record/public record.

Intermediate files or intermediate records relate to data processing. They are temporary records used to create, correct, reorganize, update, or derive output from master data files. Intermediate records are precursors of public records and are not public records that must be retained. Intermediate records only exist provided a final product is subsequently generated, which perpetuates, communicates, or formalizes knowledge of some type. (Intermediate files may occasionally exist for only a few seconds as magnetic code on the hard drive of a large computer or on the drive of a personal computer and their contents are rarely – if ever – reviewed by any person.)

**Non-record.** Material received by the District that is not business-related is considered a non-record and is not subject to the Public Records Law. Examples of non-records include junk mail; convenience copies; duplicates; books, magazines, and pamphlets; publications or reference materials received or acquired from outside sources such as professional organizations, conferences, seminars; blank forms; and periodicals.

**PUBLIC RECORDS REQUESTS**

The public should feel welcome in making a public records request. The District encourages public participation at all levels; therefore, it is important that every employee who works with the public is familiar with the Public Records Law.

If a record exists and it is not exempt from public inspection or targeted as being confidential, it is available for review and duplication.
The following is an excerpt from Section 119.07, Florida Statutes:

119.07. Inspection and copying of records; photographing public records; fees; exemptions.

(1)(a) Every person who has custody of a public record shall permit the record to be inspected and copied by any person desiring to do so, at any reasonable time, under reasonable conditions, and under supervision by the custodian of the public records.

Generally, all documents, regardless of physical form, produced or received in connection with the transaction of District business are considered public records. There are exceptions.

General Statement

The purpose of this section is to ensure compliance with the Public Records Law. The District’s records shall be open for personal inspection by any person (see previous definition of a public record).

The District’s records may never be “checked out” or “loaned”. All records shall stay in the possession of the District at all times.

Exempt and Confidential Records

Section 119.071, Florida Statutes, lists certain records that are exempt from public disclosure, usually for reasons of public safety, public health, law enforcement and/or personal privacy. Additional exemptions are specified elsewhere in the State Statutes. If the record is not specifically listed as being exempt, it is open for public inspection.

Examples of exemptions include: personal information (home addresses, phone numbers, etc.) for former or active law enforcement personnel, firefighters, and code enforcement officers; audit reports of an internal auditor before the audit is final; and uncirculated (draft) documents that are not used to perpetuate, communicate, or formalize knowledge. Social security numbers are confidential and exempt from public disclosure. If an employee meets the above exemption (FS 119.017(4)(d)(1)), he or she may submit a letter in writing to Human Resources requesting exemption and the reason.

Employees who provide access to or copies of public records must be knowledgeable of the records that are exempt or confidential or that contain exempt or confidential information. If questions arise as to whether or not a record or portion of a record is exempt or confidential, they should be addressed to the department records coordinator.

If it is determined that a record or part of a record is exempt from public records disclosure, staff shall state in writing to the requestor the basis of the exemption and the statutory citation to the exemption. If only a portion of a record is exempt, the exempt portion should be redacted.
**Inspection of Records**

**Special conditions may not be imposed for the inspection of records.** A requestor does not need to supply his name nor does he need to make the request in writing. However, Customer Service will request it be on the Public Records Request Form for tracking and clarification purposes, but cannot make it mandatory. **The District may not delay the request in any way** and the records must be open for public inspection during normal business hours. The Public Records Law does not contain a specific time limit for compliance with a public records request; however, the Florida Supreme Court has stated that the only delay is the reasonable time allowed for the custodian to retrieve the record and, if necessary, delete portions of the record that are exempt from public inspection.

It is the District’s policy that “reasonable time” is the time necessary for staff to retrieve the records and redact exempt information. If satisfying the request immediately would unduly interfere with the operation of a department, the Director of Communications will assist in arranging for a mutually satisfactory time for fulfilling the request with the requestor.

The nature of the request, the time involved in collecting and generating the information requested, the scope and volume of material involved, the general accessibility of the records, the personnel that will be required, and the information resources necessary to gather or generate the information will be taken into consideration.

**Fulfilling a Public Records Request**

“Public Record” as defined by section 119.011(11), Florida Statutes, means all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

**Request**

1. All requests for public records should be directed to the BPS Customer Service Center with one exception. Reviews of personnel files should be directed to the Human Resources Office.
2. A public records request is a request to either inspect or copy, or both, public records pursuant to Chapter 119, Florida Statutes.
3. There is no requirement that the request be made in person or in writing, or be in any particular form. However, the request must be clear enough to enable the district to conduct a meaningful search. Customer Service may ask questions about the request in order to clarify what is being asked so that they may facilitate the completion of the request in a timely manner. A Public Records Request Form will be used to help clarify the request and is available on the homepage at www.brevardschools.org.
4. The person making the request is not required to identify himself/herself or to provide information about the reason for the request or how the records will be used. However, a review of personnel records does require a signature.
5. For payment purposes, a name and address will be requested, however, a customer may still refuse to provide this information. In such instances, CSC will notify customer to contact them periodically to obtain payment information and estimated time of delivery.

Responding to the Request

1. Upon receipt of a request for public records, the Customer Service Representative shall send an acknowledgement of receipt of the request to the requester within two business days via email or US Mail.
2. If customer will not provide name, address or phone number, CSC will instruct the requester to call CSC periodically for invoice and ultimately pick up of information once filled.
3. The district shall respond to all public records requests in a reasonable time, taking into account the extent and nature of the request. Within five business days of receipt of the request, the district must take one of the following actions:
   a. Send an invoice to the requestor outlining the fees and the total amount due. A cover letter will also be included that requests payment in advance of receipt of requested records.
   b. Inform the requestor that the district is working on their request; give them an estimated time of completion and advise them about any specific circumstances affecting the completion of the request.
   c. Inform the requestor that the requested materials do not exist or are not in the custody of the district.
   d. Deny the request in writing.
4. Customer Service will send the public records request to the department in possession of and responsible for the requested information.
   a. **It is the responsibility of the department to satisfy the request.** If the department, in order to satisfy the record request, needs to get data from ET, the department will need to make the request of ET by sending a memo to Assistant Superintendent of Educational Technology and copy the Administrative Assistant of that department. ET will in turn send the estimate to the department.
      i. The department will send the estimate from ET combined with the department’s estimate to CSC who will in turn provide the information to the customer. CSC will also notify the customer if there will need to be any redaction fees and the cost of redacting document.
5. Upon receipt of payment, CSC will notify the department in writing to proceed with the request. The district shall provide the requested materials within 10 business days. If for any reason the materials cannot be provided within 10 business days, the district shall contact the requestor with an estimated time of completion.
   a. The responsible department will provide the requested material to CSC ready to be given to the customer (including redaction). The
Records Coordinator for the department must sign and include the Records Verification Form indicating it is ready to be given to the Customer. Included also is the final invoice.

i. If a department must ask ET to run a report to obtain requested public information, it is the duty of the requesting department and not ET to indicate that the report is allowable and ready to send to requestor.

6. Certified Copies of Public Records

a. Certification Statement: When more than five pages of certified copies are requested, a certification statement may be used, instead of certifying each page. In this statement, which is a cover page for the group of documents, the custodian certifies that the copies provided are true and correct copies of the originals.

   i. I (insert name, title, and school/department), Brevard Public Schools hereby certify that this is a true and correct copy of the record of Brevard Public Schools.

   Certified this (date) day of (month), (year)

   _______________________________Signature

b. Page Certification: When each page of the record is requested to be certified, the following statement shall be typed on each page, either on the bottom or on the back of the page, depending on where space is available, and signed by the custodian of records:

   i. I (insert name, title, and school/department), Brevard Public Schools hereby certify that this is a true and correct copy of the record of Brevard Public Schools.

   Certified this (date) day of (month), (year)

   _______________________________Signature

7. The district may not delay production of records. Records must be produced within the time reasonably required to identify, collect, and copy them for the requesting party. The district must make a good faith effort to satisfy the request promptly, consistent with available resources and other priorities.

8. The Public Records Law does not require the district to generate or create records not already in the district’s custody in response to a public records request. Records that are responsive to the public records request that are available as of the date the request is fulfilled must be provided, even if such records did not exist as of the date the request was received.
9. Confidential or exempt records:
   
a. If the requested records are confidential or exempt from public disclosure by statute, the records may not be disclosed. The district must inform the requestor that the records are exempt from disclosure and cite the applicable statute establishing the exemption.

b. If only part of the record is confidential or exempt, the district must redact that information and provide the remaining record to the requestor. The most efficient method should be used to redact information. One method of redacting is to 1) black out the exempt information on a copy of the original, 2) photcopying the marked copy and 3) providing the final photcopy to the requestor. The marked copy may be destroyed. Other methods are acceptable and may be used as long as the confidential or exempt information is not released to the requestor.

c. For questions or guidance regarding records exempt from disclosure, contact the District Communications office at ext. 796.

10. The Customer Service Center is responsible for responding to the request, shall maintain the request, acknowledgement, response, invoice, materials produced, or a record of what was produced; any related correspondence; and receipt of payment.

11. The district shall not dispose of requested records for a period of 30 days after the date on which a request for records was made. This requirement is in addition to, and does not lessen, the obligation of the district to retain records pursuant to the otherwise required records retention schedules.

**Fees**

Public records must be open for *inspection* without charge. The District may not sell copies of a public record to generate revenue. If the duplication cost for the Student Progression Plan, including tabs, is $98.00, the District may not sell the plan for $175.00.

Fees may be paid by cash, check, or money order made payable to School Board of Brevard County. As of the date of this document, the uniform fee for copies to be charged by all departments is as follows, unless otherwise provided by law:

1. Paper Copies
   a. 11x8.5 or less – one-sided $0.15
   b. 11x8.5 or less – two-sided $0.20
   c. 14x8.5 or less – one-sided $0.15
   d. 14x8.5 or less – two-sided $0.20
   e. 11x17 $0.25
   f. An unusually large volume of copying requiring the documents to be sent to a copy service for reproduction are to be billed to the requestor based on the actual cost to the District.

2. Certified copies
a. Shall be furnished upon payment of the fees listed below:
b. Per page certification. A charge of $1 per page shall be assessed for each individually certified page. (Section 119.07(4), Florida Statutes)
c. Certification Statement. Charge of $5 for the certification statement plus any fees for copies.
d. The district shall furnish certified copies in accordance with sections 608.452 and 620.1109, Florida Statutes.

3. Postage
a. The cost of mailing or shipping the requested material may also be added if the requestor asks that the requested material be delivered (instead of the requestor picking up the material in person).

4. CD / DVD/ VHS/ Audio Tapes
a. Duplication of CD’s and DVD’s will include the actual cost of the disk and the sleeve. Actual mailing costs must be charges rather than a flat fee. Mailing costs include jewel case and padded mailing envelope, subtracting the sleeve cost, plus postage.

5. Extensive Use of Information Technology
a. If the nature or volume of the public records requested to be inspected or copied is such that it requires extensive use of information technology resources or extensive clerical or supervisory assistance by personnel or both, in addition to the actual cost of duplication, a special service charge may be assessed. This charge shall be reasonable and shall be based on the actual cost of the clerical and supervisory personnel providing the service. (Section 119.08 (4)(d), Florida Statutes)
b. Rule 1-2.0031, Florida Administrative Code, Public Records Requests: Special Service Charge, provides:
   i. “(1) When a public records request is of the nature described in Section 119.07(4)(d), F.S., the following will apply:
      • The term extensive means more than 15 minutes expended by personnel to complete all tasks defined in paragraphs (2) and (3) below.
      • The term “clerical or supervisory assistance” includes searching for and or locating the requested record, reviewing for statutorily exempt information, deletion of statutorily exempt information, and preparing, copying and re-filing of the requested record.
      • The term “use of information technology resources” includes the setup and implementation of information technology defined in Section 282.0041(10), F.S.
   ii. The department will determine which personnel are appropriate to provide assistance in fulfilling the request. The special service charge will be computed to the nearest quarter of an hour exceeding 15 minutes based on the cost of wages and benefits of the lowest paid personnel who, in the discretion of the department head has the necessary skill and training to perform the request. The special service charge shall be in addition to the duplication charge as provided in Sections 119.07(4)(a) and (b), F.S., and will be assessed
regardless of the number of individual copies made. Payment for special services shall also be imposed where extensive use of personnel or information technology is necessary to determine whether the public record exists or is exempt from public disclosure.

iii. The requestor shall be required to pay any estimated special services charges in advance, as determined by the department prior to personnel rendering such services. District Communications will refund to the requestor any monies deposited in excess of the actual costs incurred to fulfill a request, or, in the alternative, the requestor shall be required to remit additional monies to pay for any costs in excess of the deposit. In the event the requestor fails to remit additional monies to cover costs in excess of the monies deposited, Customer Service shall withhold releasing any public records identified pursuant to that request until those amounts are paid in full.

6. The wage expense portion of public records special service charges\(^1\) shall be calculated based on the following formulas\(^2\):
   a. Public Records Special Service Charge =
      - \((\text{Hourly Base Rate of Pay} + \text{Hourly Value of Benefits}) \times \text{Number of Hours Worked}\)\(^1\)
      - \text{Hourly Base Rate of Pay} = \text{AS400 Screen H517}
      - \text{Annual Base Rate of Pay and Hourly Value of Benefits}\(^2\)
      - Upon receipt of payment, fees will be processed according to the revenue receipt procedures of the district.

7. Redaction Services for records request is as follows:
   a. The cost of calculating wage of person redacting document will follow the formula set in # 6
   b. For email redaction the formula for time is as follows:
      - 3 minutes per email \(\times\) # of emails = time spent
      - Time spent \(\times\) wage of person redacting document = redaction cost

8. Notwithstanding what is stated herein, no charges will be assessed against the requestor if the cost of production is less than $5.00.

**Format**

The District must provide a copy of a record in the medium requested if the record is maintained in that medium. The District is generally not required to:

- reformat its records to meet a requestor’s particular needs; or
- produce a record that does not exist.

**Information from Public Records**

An employee is not required to verbally provide information or to prepare a “report” from records. The statutory obligation of the District is to provide access to or copies of public records.
Copyrighted Documents

(Reference Government-in-the-Sunshine Manual/Copyrighted Material Obtained by Agencies) Some records within the District may be copyrighted. Examples include building codes, plans, and books. Federal copyright regulations supersede Florida’s public records law. If a document in the District’s possession is copyrighted (and not otherwise example or confidential), the District may permit the public to review the document; however, the District may not copy copyrighted material for distribution to the public without the express written consent of the copyright holder.

Minutes

(Reference AGO 91-26) The minutes from Board meetings are public records when the clerk or recording secretary has performed his or her duty to prepare the minutes, even though they have not yet been sent to the Board members and have not been officially approved by the Board.

DETERMINING IF AN AGENCY IS SUBJECT TO THE PUBLIC RECORDS LAW

Occasionally, the Brevard Public Schools will receive an inquiry about whether an organization the District is associated with is subject to the Public Records Law. Examples include a contractor performing work for the District, Brevard Schools Foundation, and an auditor.

Section 119.011(2), Florida Statutes, defines “agency” for the purposes of the Public Records Law to include a “private agency, person, partnership, corporation, or business entity acting on behalf of any public agency.” The Florida Supreme Court listed a “totality of factors” test in News and Sun-Sentinel Company v. Schwab, Twitty & Hanser Architectural Group, Inc., 596 So. 2d 1029 (Fla. 1992) as follows:

1. the level of public funding;
2. commingling of funds;
3. whether the activity was conducted on publicly owned property;
4. whether services contracted for are an integral part of the public agency’s chosen decision-making process;
5. whether the private entity is performing a governmental function or a function which the public agency would otherwise perform;
6. the extent of the public agency’s involvement with, regulation of, or control over the private entity;
7. whether the private entity was created by the public agency;
8. whether the public agency has a substantial financial interest in the private entity; and
9. for whose benefit the private entity is functioning.

If you receive an inquiry about whether an agency working with the District is subject to the Public Records Law, have your Department Director send a written inquiry to the Office of Risk Management.
DESIGNATING A RECORDS COORDINATOR

Every Department Director or School is responsible for designating a records coordinator. This person should be familiar with the records created and maintained in each department or school.

When a records coordinator leaves a department or school, the Department Director or Principal is responsible for designating a new coordinator and notifying the Director of Communications.

The records coordinator will be responsible for:

- Maintaining an inventory of records.
- Maintaining an inventory of records stored off-site and records previously filmed, microfiched, or imaged.
- Coordinating with the Records Management Specialist on the disposition of records (store, destroy, or image).
- Initiating requests from CSC for public records requests to retrieve records from the off-site storage facility.

USING THE GENERAL RECORDS SCHEDULES TO CONDUCT AN INVENTORY

General Records Schedules

Before beginning an inventory of the records in your office, become familiar with the general records schedule applicable to your area. There are two types of retention schedules: 1) general records schedules published by the Florida Department of State; and 2) individual agency (District) record schedules. Retention schedules establish minimum periods of time for which the records must be retained based on the records' administrative, fiscal, legal, and historical values. The content of the document – not the format – determines the retention period.

The District uses the following general records schedules:

- GS1-SL State and Local Government Agencies
- GS7 Public Schools PreK-12, Adult & Vocational/Technical

All records schedules can be viewed and/or printed from the State’s website:

http://dlis.dos.state.fl.us/recordsmgmt/gen_records_schedules.cfm

The GS1-SL schedule provides retention periods for the most common administrative records such as routine correspondence and personnel, payroll, financial and legal records. The remaining schedules are applicable to program records of specific functional areas (PreK-12, Adult & Vocational/Technical).
Retention periods are defined as:

Anniversary years – from a specific date. If a record has a three-year retention, the eligibility date would be three years after the ending date of the record series.

Calendar – January 1 through December 31. If a record has a three-calendar-year retention, the eligibility date would be three years after the end of the calendar year of the last record in the series.

Fiscal – July 1 through June 30. If a record has a three-fiscal-year retention, the eligibility date would be three years after the end of the fiscal year of the last record in the series.

OSA – retain until obsolete, superseded, or administrative value is lost. With this retention, a record is eligible for destruction whenever it is no longer of any use or value. The retention could vary from one day to any length of time thereafter. The District is not required to document the disposition of records with a retention of OSA.

Triggering event – records become eligible for destruction on or after a specific triggering event. For example, retain for life of the structure; retain for three years after final audit.

Estimating Volume:

The quantity of records in each record series is usually expressed in terms of cubic feet. Records volume conversion to cubic foot measurements:

- Letter size drawer or box 1.5 cu. ft.
- Legal size drawer or box 2.0 cu. ft.
- Letter size 36” shelf 2.0 cu. ft.
- Legal size 36” shelf 2.5 cu. ft.
- Magnetic tapes (12) 1.0 cu. ft.
- Cassette tapes (200) 1.0 cu. ft.

(Use quarter increments when describing the volume - .50 cu. ft., .75 cu. ft., 1.0 cu. ft., 1.25 cu. ft., etc.)

Conducting an Inventory

The inventory should identify and describe each record series created and maintained in your work area. A record series is defined as a group of related documents arranged under a single filing arrangement or kept together as a unit because they consist of the same form, relate to the same subject, result from the same activity, or have certain common characteristics. If the records were initiated by your department/division, you are responsible for their retention and disposition. For example, the annual Comprehensive Annual Financial Report is generated by the Financial Services Department. That department copies departments when the final report is issued. The
responsibility to retain and properly dispose of the report rests with Financial Services, not the departments. Simply copying another department on a transmittal does not change where the record was initiated or the status of the record copy.

When conducting your inventory, if you do not see a record from your work area listed on one of the general records schedules, it may be included on the District’s individual agency record schedules. Contact the District Communications for assistance.

Electronic records must also be included in your inventory. Remember, a public record is a public record regardless of its physical form.

The form, “Records Inventory Worksheet,” has been included in Appendix A. Use this form to complete your inventory.

The following information should be included on the worksheet for each record series:

**Record series title and item number.** Use the appropriate records schedule referenced above and insert the exact title and item number from the schedule. For example: Correspondence and Memoranda: Administrative Item #17.

**Description.** Describe the record series’ purpose and function with regard to the District’s operation. For example: Board and Superintendent correspondence or correspondence with vehicle for hire companies.

**Retention period.** The retention periods set forth in the general records schedules are based on federal and state laws and regulations, general administrative practices, and fiscal management principles. The schedules establish minimum retention periods. The District may opt to retain certain records longer. For example, certain accreditation committees have standards, which require longer retention periods. **If you choose to retain a record series longer than the minimum period, note this on the inventory worksheet for future reference.**

**Inclusive dates.** List the beginning and ending date of the record series. This is used to determine when the records are eligible for disposition under the appropriate retention schedule.

**Notes.** This is the area where you should add any special notes relating to the record series in your office.

While conducting the inventory, you may not dispose of any records unless they fall within the non-records category. Even those records that presently have retention schedules must be approved for destruction by the Director of Communications.

**DETERMINING THE VALUE OF A RECORD**

Retention schedules establish minimum periods of time for which the records must be retained based on the records’ administrative, fiscal, legal, and historical values. The following standards are used in making that determination:
**Administrative.** Administrative or operational value refers to the usefulness of records to the District in its ongoing activities. These records are normally made or received in connection with the performance of the functions and responsibilities of an office, and they have administrative value as long as they are needed to document the activity to which they are related. Their administrative value may diminish when the transactions to which they relate have been completed.

**Fiscal.** These records document the accounting of public funds and property. Records of local activities funded partially by state and federal funds may require retention periods established by those levels of government. Usually, the value of the record declines after the records have been audited.

**Legal.** Records of this nature contain evidence of legally enforceable rights or obligations. Examples include contracts, leases, titles, and minutes of meetings of administrative and quasi-judicial bodies.

**Historical or Archival.** These records have enduring historic, administrative, or fiscal value that may be eligible for permanent preservation. Some records that do not have a permanent retention might have enduring value to the District as evidence of the interactions between government and citizens and as sources of information about the District, its society and culture.

The earliest records of the District (or a new department or function) are relatively more important than their counterparts for later years because they constitute virtually the entire documentation of the formative years. Care must be taken to avoid allowing age to become a dominant factor in determining historical/archival value.

**FACTORS THAT INFLUENCE THE DISPOSITION OF RECORDS**

**Litigation.** When the District has been placed on notice that a potential cause of action is pending or underway, records related to that cause MAY NOT be disposed of in any manner.

**Public Records Requests.** Section 119.07(1)(f), Florida Statutes, provides that the District may not dispose of a public record for a period of 30 days after the date on which a request to inspect or copy the record was made.

**Accreditation Standards.** Certain departments may receive national or statewide accreditation or certification by professional societies, organizations, and associations. These groups may place more stringent record-keeping requirements on the District than those mandated under state or federal law. The District’s records management program uses retention schedules with minimum legal retention periods. Departments may choose to maintain their records longer to meet accreditation standards.

**DISPOSITION OF RECORDS**

Generally, you must maintain the current year plus one prior year in your office before forwarding to the Records Management Specialist for disposition. Disposition may be by physical destruction, off-site storage, or electronic imaging.
Physical Destruction. This method is recommended for records that have a relatively short retention period and administrative value is gone or diminished. When records are destroyed, they may either be recycled or shredded.

If the records contain any sensitive information (personnel information, bank account or credit card numbers, social security numbers, etc.) they must be shredded. The District has several options available to recycle and shred documents. Current information is available from the Records Management Specialist.

Electronic Imaging. Imaging is reserved for vital records or records that have a longer or permanent retention schedule (e.g. student records). The following criteria will be used when determining if a record is eligible for imaging:

- Are the records considered a “public record” as defined by State Statute?
- Do the records have a minimum retention period assigned by the State Bureau of Archives and Records Management of 10-plus years?
- Are the records considered the District’s record/master copy?
- Is the information contained in the records unique to the District and no other copies or sources for the information exist?
- Are the records inactive?
- Are the records considered complete and need no documents to be added in the future?

The Records Management Specialist and the Director of Communications shall determine how long records of the District could be stored before the cost of storage under their retention period would exceed the cost of imaging. Imaging is sometimes viewed as “the answer” for a department’s records; however, it is an expensive process that should only be used under the criteria outlined.

Imaging or storing records comes with a corresponding obligation to maintain and make accessible. Keeping a record that has met its retention period “just in case” is a long term, expensive proposition.

Records Disposition Process

A) Each school or department in the district must systematically dispose of public records that have met their retention requirements and are no longer needed.
- The record holder or custodian must properly document disposition of these records. A records disposition document form is available from the District Communications website at http://districtcommunications.brevardschools.org/RecMgt/Forms/Disposition.pdf.
Records Management Procedure

Brevard Public Schools

- The Records Management Liaison Officer or Records Coordinator must permanently retain the completed disposition form.
- Records with retention of “retain until obsolete, superseded, or administrative value is lost” (OSA) do not have to be documented when disposed, except for records that have been microfilmed or scanned where the microfilm or electronic version will serve as the record copy.
- Records determined by the State Archives of Florida to have archival value shall be transferred to the Archives in accordance with Archives procedures.

STUDENT RECORDS PROCEDURES (TRANSCRIPTS)

With the exclusion of exceptional education records, District Communication’s Customer Service Center is the main processing hub for transcripts/records for the district. However, high schools have the ability to provide transcripts/records from 1996 to the present. Any individual seeking records/transcripts who attended Brevard Public Schools prior to 1996 must make the request for to the Customer Service Center.

What types of records are available?

1. **Transcripts** – Includes grades, total credits, class rank and standing, GPA, graduation and withdrawal date.
2. **Immunization records** – After the year of 2000 “if” your immunizations records were sent to our office, they were permanently recorded. Anyone prior to 2000 will not have immunization records.
3. **Diplomas** – The district does not retain copies of diplomas. Copies can be ordered by Herff Jones at 1-800-635-5670.
4. **Verification of Graduation** – Only a yes or no is provided.
5. **GED** – The district does not retain copies of GEDs. Copies can be ordered through the state of Florida at [http://ace.brevard.k12.fl.us/gedreq%20FORM.pdf](http://ace.brevard.k12.fl.us/gedreq%20FORM.pdf).

How are records ordered?

1. All transcripts/records must be ordered by completing the district’s Student Transcript/Records Request form located at [http://www.brevardschools.org/forms/pdf/Transcript%20Request%20Form.pdf](http://www.brevardschools.org/forms/pdf/Transcript%20Request%20Form.pdf).
2. The form must be filled out, signed and returned with appropriate fee and legal photo ID to either the Customer Service Center or high school.

What information is needed to locate records (including for birth certificate reasons)?

1. Names of all BPS schools attended
2. Years attended and years left each school
3. Any other names student was listed under while in school
4. Date of birth
5. In some cases, the Social Security number
What will it cost?

1. Transcripts and/or Immunization Records
   a. Currently Enrolled Students (plus one year after graduation)
      i. First one free
      ii. $1.00 – each additional
   b. Non-enrolled student (over one year after graduation)
      i. $5.00 per transcript/record

How long does it take?

1. Records will be processed within five business days and can be picked-up in person or mailed to appropriate address.

Is identification required when ordering a transcript?

1. Yes, a legal photo ID that must be displayed at the time the record is ordered.
   a. Cases of persons requesting transcripts in order to obtain a legal photo ID will be handled on a case by case basis.
2. District personnel may make a copy of the picture ID and attach it to the completed request form for record audit purposes or verify in writing that a legal photo ID has been provided.

How long will records be held for pick up once they have been requested and processed?

1. Records are held for ten business days after notification. Requests for copies are then destroyed and a new request and payment must be made. Monies for original request are non-refundable and should deposited when received.

Can someone else pick up records for another individual?

1. Yes, but the student must authorize in writing on the request form giving permission for someone other than the student to pick/up and/or receive the record.
2. The individual the student has authorized to receive/pick-up records must present an unexpired OFFICIAL picture ID which will be copied and attached to the request form for audit purposes.

VERIFICATION OF GRADUATION PROCEDURES

The district may provide graduation status to prospective employers and colleges in the form of a simple yes or no and the date of graduation if applicable. This does not require proof of identification or a fee. Schools may provide this information upon request if the student graduated after 1996. Requests for graduation status of students who graduated prior to 1996 would need to be directed to the Customer Service Center in Viera.


**ESE RECORDS PROCEDURES**

Exceptional Student Education (ESE) records are housed by schools in an orange-colored Audit File for each ESE student.

ESE records are considered to be Category B records but have a longer retention period than other Category B records.

For purposes of records retention the Audit Files, for students who are solely-gifted, are considered ESE records.

Parents are notified regarding the retention time of ESE records through the elementary student handbook, the secondary student handbook, and through the IDEA Procedural Safeguards Notice.

Schools are responsible for storing the ESE Audit File until the date it can be destroyed and for annually selecting and destroying the ESE records in compliance with established timelines.

ESE records are retained for five calendar years after the student’s transfer out of the ESE program, parental refusal of admittance to the ESE program, graduation with a standard diploma, or withdrawal of the student from the school district. Withdrawal from the school district means that student is no longer enrolled in any elementary or secondary school in Brevard County (including all private schools and including students that live in Brevard County who are enrolled in a home education/home school program).

**Retain ESE records until the student attains the age of 27 when:**

- The student graduates with a special diploma
- The student withdraws before graduation and whereabouts are unknown
- The student attended private school and graduation status is unknown
- The student enrolled in a home education/home school program and graduation status is unknown.

**Destroy ESE records after retaining for five years from**

- The date the student graduated with a standard diploma
- The date the student moved out of Brevard County
- The date the student was dismissed from all ESE programs
- The date an eligibility staffing was held and the parent refused to give permission for the student to be determined eligible for an ESE program

ESE Audit Files are never sent to the ESE Records Office at the Educational Services Facility (ESF). Each school is the custodian of the ESE record for students who attend/attended that school until the record can be permanently destroyed with the above timelines.
**EMAIL / ELECTRONIC MAIL**

Email is considered a public record; however, electronic mail (email) is not a record series – it is simply a means of communication. The retention period of an email is determined by the content of the email. Retention periods are set based on legal, fiscal, administrative, and historical values, regardless of the format of the record. There is no single retention period that applies to all of the District’s emails.

If an email is prepared in connection with official business of the District and it is intended to perpetuate, communicate, or formalize knowledge, then it should be printed and filed in the appropriate file or moved to the appropriate electronic file.

In State v. City of Clearwater (2003), the Florida Supreme Court ruled that private email stored in a government computer does not automatically become a public record by virtue of that storage. **It is important to note that this decision does not address the appropriateness of using a public email system for non-public business.**

When email is used as a transitory message (a means of informal communication), its retention period is OSA (retain until obsolete, superseded, or administrative value is lost). Examples of transitory email:

- “Please send me a copy of the student handbook.”
- “Call me so we can review our schedules and set a meeting date.”

When email is used as formal communication (used to perpetuate, communicate, or formalize knowledge), it is no longer considered a transitory message and must be retained in accordance with the record series of its subject. Examples include:

<table>
<thead>
<tr>
<th>Subject of the Email</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel action report for an employee</td>
<td>25 fiscal years after separation or termination if the employee is enrolled in FRS. All others – 50 years</td>
</tr>
<tr>
<td>Establishment of a policy</td>
<td>2 years after superseded or becoming obsolete</td>
</tr>
<tr>
<td>Budget records (supporting documents)</td>
<td>3 fiscal years provided all audits have been released</td>
</tr>
<tr>
<td>Citizen complaint</td>
<td>1 anniversary year after the complaint has been resolved</td>
</tr>
</tbody>
</table>

The District’s email system is not intended for long-term records retention. Each email user in the District must take responsibility for deleting transitory messages and printing/filing emails used as formal communication in the relevant file.

**The initiator of an internal message and the recipient of an external message is the person responsible for ensuring compliance with the records retention requirements.** The Information Technology Division will assist in retrieving specific emails in response to a public records request.
**ELECTRONIC RECORDS**

A record is a record regardless of its physical form, characteristics, or means of transmission, made or received in connection with the transaction of official District business. An electronic record is any information that is recorded in machine readable form. Electronic records may include numeric, graphic, audio, video, and textual information that is recorded or transmitted in analog or digital form. Examples include electronic spreadsheets, word processing files, databases, electronic mail, instant messages, scanned images, digital photographs, and multimedia files.

Electronic records should be included in every department’s inventory. The general records schedules will be used to determine the final disposition (retention period) of the District’s electronic records. The content of the record, not the format of the record, determines its retention period. Electronic records are subject to the same records retention, access, and disposition requirements as traditional paper records.

The Director of Communications and the Information Technology Assistant Superintendent will work together to ensure that electronic records are retained, made available, and disposed of according to state guidelines and laws. Records management requirements must be addressed before new or enhanced systems are developed and implemented.

Before new automated systems are put into place, the following will be considered:

- What is the retention period of the information?
- Is there confidential or exempt information that must be protected?
- How will public access to the records be provided?
- How will disposition be carried out?

**Public Records Requirements**

Each department is required to include electronic records in its department inventory. Electronic records will follow the same retention schedules used by each department. Active records stored in electronic format in each department are available for public records requests.

**General Requirements**

Maintenance and disposal of electronic records, as determined by the content, are the responsibility of the initiator of the record. The record copy or master copy is the record created by and filed with the initiator. The same disposition process outlined in this manual for paper and other records also applies to electronic records.

**Information Technology Backup**

The General Records Schedule provides that “there is no retention schedule for backup tapes or other forms of data backup. A backup tape or drive should be just that: a data/records backup kept solely as a security precaution but not intended to serve as the record copy or as a records retention tool.” In the District, the Information Services
Department performs regular backup of the District’s network drives. Backups are used for system restoration purposes only.

**IT's Role**

The Information Technology Services is responsible for building the District’s system, maintaining the server and backups. IT is not responsible for managing the content of the District’s electronic records. Information Technology will work with departments to ensure compliance with records retention requirements for electronic records.

**Social Media**

(Facebook, Twitter, blogs, forums, instant messaging, etc.) These are considered to be public records if they contain communications that are connected with the transaction of official business. Retention shall be based on the content of the communication. Just like email and other forms of electronic communication, no single retention period would apply to all the postings.

These records may qualify as duplicates if the record copy is maintained elsewhere in the District. If the messages are considered transitory, they would carry a retention period of OSA (retain until obsolete, superseded, or administrative value is lost).

**Storage Media**

Portable storage media (USB flash drive, diskettes) are considered transport mechanisms and are not to be used for storage of official records. Confidential or sensitive information shall not be stored on any portable storage media devices.

**Disposition**

The retention and disposition of all electronic records shall be scheduled in accordance with Rule 1B-24, Florida Administrative Code. Prior to the destruction of an electronic record, the requestor must complete a Records Transmittal Form and submit to the Records Management Specialist. Electronic records may not be destroyed until written authorization is provided by the Records Management Specialist.

**Duplicate or Convenience Copies**

Duplicate or convenience copies of electronic records may be destroyed/deleted at any time. Disposition documentation is not required for these records.

**SOCIAL SECURITY NUMBERS**

Social security numbers are confidential and exempt from disclosure under the Public Records Law (Sec. 119.071(5)). Please refer to that statute for the specific conditions by which a social security number may be released.
IDENTIFYING VITAL RECORDS PRIOR TO A DISASTER AND DAMAGED RECORDS DISCOVERY

Identification of Vital Records

A vital record is a record generated by your department that is critical to the continuation of your department’s normal operations in a post-emergency situation. Vital records contain information that is not available from any other source and their loss would severely impact essential services to the population and/or revenue to the District.

Departmental Records Coordinators

Each department/division should designate a records coordinator who is familiar with the vital records in their area.

Departments are responsible for identifying their vital records for quick access during an emergency. Vital records should not be stored on the floor, bottom drawer of a filing cabinet, or near a potential water source.

If there is warning in advance of an emergency (hurricane, for example), departments that indicated records would need to be moved to a safe facility will be responsible for boxing, labeling, and transferring the records to the predetermined location indicated on their vital records inventory and in accordance with the District’s Emergency Plan.

Discovery of Damaged Records

Reprinted from the U.S. National Archives and Records Administration:

Many record materials will respond well to simple air drying as long as minor physical distortion is acceptable. Small quantities may be spread out on top of clean blotting material (paper towels) in a cool dry location with plenty of air circulation.

As long as materials are not too densely packed and active drying conditions are maintained, mold growth should be mitigated. While high heat and harsh sunlight will dry records quickly, they may permanently damage record materials and should be avoided.

Quantities too large to handle within the first 48 hours should be frozen either for defrosting and air drying at a later date, or for referral to a commercial drying vendor or preservation professional.

If you discover water-damaged records when you re-enter your work area, do not open/close wet files or books or attempt to separate pages. This will cause irreparable damage. If it is determined that restoration will be delayed, the District will arrange for your vital records to be frozen until the recovery procedure can begin.
**RECORDS MANAGEMENT LIAISON OFFICER AND RECORDS COORDINATOR**

The district's Records Management Liaison Officer (RMLO) is designated by the Superintendent and serves as the district’s contact for records management. In addition, each school/department shall appoint a Records Coordinator who will be the RMLO’s records contact for that school/department. The Records Coordinator will complete the Verification Form. Address all questions, issues, or concerns relating to records in the district to the RMLO or Records Coordinator.

**VIOLATION**

Violation of Florida State Statutes and/ School Board policies and procedures concerning public records may leave the district open to legal actions. Disciplinary measures may result to employees who defy these policies and procedures.
APPENDIX
Public Records Request Form

Brevard Public Schools
Customer Service Center
2700 Judge Fran Jamieson Way
Viera, FL 32940
Telephone: 321-633-1000 ext. 500
FAX: 321-617-7779
Email: csc@brevardschools.org

Request for Public Records of Brevard Public Schools
REQUESTOR INFORMATION (PLEASE TYPE OR PRINT)

Name (Last, First, Middle Initial) ____________________________
Company Name (If Applicable) ____________________________

Street Address ____________________________
City ____________________________ State __________________ ZIP Code ____________

Primary Phone Number ____________________________ Other Phone Number __________________ E-mail address __________________

Description of Records Requested: To expedite the retrieval of records, please be as specific as possible as to the public records you desire. Attach a second page if necessary. [Note: Under public records law, the district is not obliged to create a new document or record in response to a request for public records.]

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

To assist us with processing your request, please check one of the following:

☐ Personal Use ☐ Commercial Use ☐ Legal
☐ Media ☐ Higher Education ☐ Union

If you checked Commercial Use, please state the purpose: __________________________________________

Delivery Method (check one):

☐ Email ☐ Review Record in Person ☐ US Mail ☐ Pick Up

Format (check as applicable)

☐ Electronic ☐ DVD/CD ☐ Duplicated copies

Fees for the cost of reproducing public records will be assessed as follows:
$0.15-Single Side Copy $0.20-Double Side Copy $5.00 – DVD/CD $1.00-Certified Copy

The actual cost of duplication will be collected for copies of district public records in a form other than a duplicated copy (includes reproduction of maps).

The actual labor cost of the personnel providing the service will be collected as permitted by State law if it requires more than fifteen minutes of clerical or supervisory assistance by District personnel including reduction services.

A special service charge attributable to the extensive use of information technology resources and/or labor cost of the personnel providing the service as permitted by State law.

Requestor Signature ____________________________ Date ____________________________

If the form is being sent electronically, typed initials are acceptable in place of signature.

Initial box if sending via email

This form may be returned via email, US Mail or in person to the addresses at the top.
Letter of Acknowledgement to Customer

(Date)

(Requestor’s Name)
(Requestor’s Address)

RE: Acknowledgement of Public Records Request
Heat Ticket ID# (Heat Ticket #)

We have received your public records request. To assist us with meeting your needs, please clarify your request by filling out the attached Request for Public Records form. Once we receive further clarification, your request will be processed in accordance with the Florida Public Records Law.

We have received your public records request. Your request will be processed in accordance with the Florida Public Records Law.

Please be advised there are fees to cover the cost of reproduction, including copier expenses, supplies and staff time associated with all requests. You will be advised as soon as possible regarding estimated costs. Payment will be due in advance by check or money order made payable to School Board of Brevard County. If the actual cost is more than the estimate, your records will be released when payment in full has been received. If actual cost is less than the estimate, a check for reimbursement will be requested and mailed to you.

You will be notified if records are exempt from public disclosure. Under public records laws, the district is not obliged to create a new document or records in response to a request for public records. Likewise, the district will not acquire computer software for the sole purpose of providing access or delivery of public records that are accessible by other means.

If you have any questions, you may contact me at (321) 633-1000, Ext. 500 or by e-mail at csc@brevardschools.org.

Sincerely,

Name, Customer Service Representative
School Board of Brevard County
Office of District Communications
2700 Judge Fran Jamieson Way
Viera, FL 32940-6601
(321) 633-1000 ext. 500
**Department Verification Form**

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
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<tbody>
<tr>
<td><strong>AUTHORIZATION:</strong>&lt;br&gt;Department Record Coordinator Name: ________________________________&lt;br&gt;Name(s) of Employee(s)/Departments Filling Request: ________________________________&lt;br&gt;</td>
<td><strong>DETERMINATION:</strong> (Department determines if information requested is public. If department can fill, go to step 3. If a report is required from ET, the responsible department sends a memo to Gino Butto and copy to Kelly Chiniski. ET will return estimate and data to department for verification.)&lt;br&gt;&lt;br&gt; Memo Request to ET sent: ___________ Estimate Received from ET on: ________________&lt;br&gt;&lt;br&gt; Department will contact CSC with estimate. CSC will contact the customer, collect required payment and notify department that the request may be processed.</td>
<td><strong>VERIFICATION:</strong>&lt;br&gt;Department - Please check applicable section and fill in appropriate rules that apply.&lt;br&gt; ___ Information contained in this Public Records Request is approved for release according to Florida Statute(s)/State Board Rules and School Board Policy.&lt;br&gt; ___ Portions of the material requested has been excluded as it contained information that is confidential or exempt from public disclosure in accordance with:&lt;br&gt;&lt;br&gt; Florida Statute(s)/State Board Rules: ____________________________________________&lt;br&gt;School Board Policy/Policies: ____________________________________________&lt;br&gt; ___ Cannot be filled in accordance with Florida Statute(s)/State Board Rules:&lt;br&gt;&lt;br&gt; ____________________________________________________________________________&lt;br&gt;School Board Policy/Policies: ____________________________________________________________________________&lt;br&gt;</td>
</tr>
</tbody>
</table>

Date Dept. Filled and Provided to Customer Service: ________________________________

Dept. Verifier Name (please print): ________________________________________________

Verifier Signature: ____________________________________________________________

Verifier signature indicates confirmation that this public records request has been prepared and/or redacted in accordance with Florida/Statute/State Board Rule and or School Board Policy. The verifier may be the same as the Records Coordinator.
### Public Records Request Invoice

**DATE:**

**HEAT Ticket #**

<table>
<thead>
<tr>
<th>Brevard Public Schools</th>
<th>Requestor's Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service</td>
<td></td>
</tr>
<tr>
<td>School Board of Brevard Co.</td>
<td></td>
</tr>
<tr>
<td>2700 Judge Fran Jamieson Way</td>
<td></td>
</tr>
<tr>
<td>Viera, FL 32940-6699</td>
<td></td>
</tr>
<tr>
<td>Phone: (321) 833 1000 ext. 500</td>
<td></td>
</tr>
<tr>
<td>Fax: (321) 817 7779</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:nsc@brevardschools.org">nsc@brevardschools.org</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>DESCRIPTION</th>
<th>Amt</th>
<th>Number</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Item 1 description</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Item 2 description</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Item 3 description</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Item 4 description</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Estimate $</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Revised</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Miscellaneous $</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SHIPPING AND HANDLING $</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>FINAL TOTAL $</td>
</tr>
</tbody>
</table>

**Department Handling Request**

Estimates must be paid in full before the department will fill the request. BPS accept checks or money orders made payable to Brevard Public Schools. If the Final Invoice amount is more than the estimated cost, the requestor must pay the difference before the request will be released. If the requestor is due a refund, a request will be submitted to accounting and will be mailed.
Final Invoice Letter to Customer

(Date)

(Name)
(Address)

RE: Public Record Request
HEAT TICKET I.D.# ( )

Dear _______________,

Please find attached an invoice for your public record request. Upon payment of the invoice amount, we will provide you with copies of the records. Please make your check or money order payable to School Board of Brevard County and send it to:

School Board of Brevard County
Attn: Customer Service Center
2700 Judge Fran Jamieson Way
Viera, FL 32940-6601

Your request will automatically be cancelled after ten (10) business days if CSC does not receive contact from you or payment within this timeframe.

Please let me know if I may be of further assistance.

Sincerely,

Name, Customer Service Rep.
School Board of Brevard County
Office of District Communications
2700 Judge Fran Jamieson Way
Viera, FL 32940-6601
(321) 633-1000 ext. 500
Denial Letter

Date

Name
Address

RE: Public Records Request
I. D. # __________

Dear ______________,

This letter is in reference to your public records request.

______ All the material you requested contained information that is confidential or exempt from public disclosure in accordance with the Florida Statute ________________________.

______ Information provided as requested.

If you have any questions, you may contact me at 321-633-1000 ext. 500 or by e-mail to csc@brevardschools.org.

Sincerely,

Christine Davis, Director
School Board of Brevard County
Office of District Communications
2700 Judge Fran Jamieson Way
Viera, FL 32940-6601
(321) 633-1000 ext . 500
Final Letter Paid in Full

(Date)

(Requestor’s Name)
(Requestor’s Address)

RE: Public Records Request
       HEAT TICKET I.D. # (HEAT Ticket Number)

Dear (Insert name of requestor),

Please find enclosed the materials related to your request for public records and final invoice, marked PAID IN FULL.

_____ Information provided as requested.

_____ Some of the material you requested contained information that is confidential or exempt from Public disclosure in accordance with Florida Statutes, School Board Rules/Policy....Provide reason and statutory authority for all redactions, EG.G. SS# per FS section 119.07(5) (A)3 and therefore has been excluded.

_____ Request is exempt from public record and cannot be filled per....Provide reason and statutory authority for denial, EG.G. SS# per FS section 119.07(5) (A)3

If you have any questions, you may contact me at 321-633-1000, Ext. 500 or by e-mail to csc@brevardschools.org.

Sincerely,

Christine Davis, Director
School Board of Brevard County
Office of District Communications
2700 Judge Fran Jamieson Way
Viera, FL 32940-6601
(321) 633-1000 ext. 500
Denial Letter

Date
Name
Address

RE: Public Records Request
I. D. # __________

Dear _______________,

This letter is in reference to your public records request.

______ All the material you requested contained information that is confidential or exempt from public disclosure in accordance with the Florida Statute ________________________.

______ Information provided as requested.

If you have any questions, you may contact me at 321-633-1000 ext. 500 or by e-mail to csc@brevardschools.org.

Sincerely,

Christine Davis, Director
School Board of Brevard County
Office of District Communications
2700 Judge Fran Jamieson Way
Viera, FL 32940-6601
(321) 633-1000 ext. 500
PRR Cancellation Letter

Name
Street Address
City/State/Zip

Date

Heat Ticket #

Dear ____________________,

I am writing to inform you we are cancelling your public records request due to non response/payment. Any monies paid by you for retrieval of this record to date will be deposited and are non-refundable. If you decide that you wish the information in the future, you will need to make a new request.

Sincerely,

CSC Representative
STUDENT TRANSCRIPT/RECORDS REQUEST FORM

This form is used to request transcripts/records for students who last attended Brevard County public schools. Complete all information requested below. Incomplete forms will not be filled. A signature and legal copy of photo identification is required. The requested records will be mailed within five (5) business days after receipt of a completed request. Mail or bring to The School Board of Brevard County, CSC, (all years of attendance/graduation), 2700 Judge Fran Jamieson Way, Viera, FL 32940 or to the last school attended (1996 and after), along with appropriate fees. Fees may be paid by cash or money order. No personal checks or debit/credit cards.

Fee Schedule

<table>
<thead>
<tr>
<th>Fee Schedule</th>
<th>Fee Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Currently enrolled students (obtain from current school)</td>
<td>□ Non-enrolled student (over one year after graduation)</td>
</tr>
<tr>
<td>Up to one year after graduation (obtain from CSC or former school)</td>
<td>Obtain from CSC (all years) or last school attended (after 1996)</td>
</tr>
<tr>
<td>• $1.00 per copy</td>
<td>• $5.00 per copy</td>
</tr>
</tbody>
</table>

Name(s) used while attending school (first, middle, last)__________________________

Current name (if different than above – first middle, last)__________________________

Current address______________________________________________________________

Student birth date________________________ Current daytime telephone #________________________

Last year in school________________________ Did you graduate? □ Yes □ No

If no, indicate last grade attended________________________

Name of last public school attended in Brevard County (including K-12, adult education, etc.)________________________

Indicate which records you are requesting (Check all that apply):

□ High/Middle School Transcript □ Elementary School Records □ Immunization Records

□ Adult Ed □ GED

Number of copies you are requesting:________

Indicate how you wish to receive the records:

□ Mail □ Pick-up by student □ Pick-up by person other than student (this person must provide legal photo ID)

Legal name of person picking up the transcript

Address if requested to be mailed

Name

Address

City State Zip

Name

Address

City State Zip

Authorization Statement and Signature

I certify, under penalties of perjury, pursuant to Florida Statute Section 92.535, that I am the former student requesting my records, or the parent/guardian of a former student (who is under the age of 18 or meets other statutory requirements) requesting records of said student. I hereby authorize the release of records of information requested.

Signature:________________________ Date:________________________

Eligible Parent/Legal Guardian or Student 18 Years of Age or Older

REMARKS:________________________________________________________

CSC Rep:________________________ Reception #________________________

Date Mailed/Picked Up __________________________ Check #________________________
Checklist for Department Receipt and Processing of PRR

Department Rep. Name:

Customer Name:

HEAT Ticket#:

<table>
<thead>
<tr>
<th>Department Steps to Follow</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. PRR is received by department head</td>
<td></td>
</tr>
<tr>
<td>2. Department head distributes to appropriate person</td>
<td></td>
</tr>
<tr>
<td>3. Designated person reviews PRR and creates Invoice</td>
<td></td>
</tr>
<tr>
<td>4. Department sends it to CSC to contact customer with invoice</td>
<td></td>
</tr>
<tr>
<td>5. CSC gets back with department on whether to proceed or not</td>
<td></td>
</tr>
<tr>
<td>6. If department is told to proceed, they pull information</td>
<td></td>
</tr>
<tr>
<td>7. Department sends information to CSC along with Verification Form and final invoice (if different than estimate)</td>
<td></td>
</tr>
<tr>
<td>8. CSC notifies requestor of final payment and sends requested information after payment is received.</td>
<td></td>
</tr>
</tbody>
</table>

Steps that Records Clerk Should Follow for Records Disposition

<table>
<thead>
<tr>
<th>Records Clerk Steps to Follow</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Pull records to be purged 3 years and back from current school year</td>
</tr>
<tr>
<td>2. Separate Cums By Year and Alphabatize</td>
</tr>
<tr>
<td>3. Pull out all Unnecessary info except Category A</td>
</tr>
<tr>
<td>4. Make sure you have in each CUM the folder jacket, final transcript, immunization record, Elementary Blue Card, Yellow Middle School Card</td>
</tr>
<tr>
<td>5. Make a log sheet of what is being archived in each box of records (include name and student #)</td>
</tr>
<tr>
<td>6. Complete a DCR for transfer of records to Records at ESF</td>
</tr>
<tr>
<td>7. Keep both a copy of the DCR and log sheets for your records</td>
</tr>
</tbody>
</table>
# Checklist for CSC to Follow for Public Record Processing

| CSC Rep. Name: |  |
| Customer Name: |  |
| HEAT Ticket#: |  |

<table>
<thead>
<tr>
<th>CSC Steps to Follow</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 PRR Received in CSC (be sure to date stamp the PRR)</td>
<td></td>
</tr>
<tr>
<td><strong>No charge to the Military for Student Directory Information</strong></td>
<td></td>
</tr>
<tr>
<td>2 Logged in HEAT Database</td>
<td></td>
</tr>
<tr>
<td>4 Memo to Dept. for Estimate (Include Verification &amp; Invoice forms)</td>
<td></td>
</tr>
<tr>
<td>5 Logged in Pending PRR spreadsheet (Located in the Shared Folder on the desktop)</td>
<td></td>
</tr>
<tr>
<td>6 Estimate Received from Dept. (Show to Director of District Communications before sending to customer)</td>
<td></td>
</tr>
<tr>
<td>7 Estimate Returned from Director of District Communications to proceed or deny</td>
<td></td>
</tr>
<tr>
<td>8 Invoice Letter Sent to Customer from the CSC Rep.</td>
<td></td>
</tr>
<tr>
<td>9 Payment Received from Customer</td>
<td></td>
</tr>
<tr>
<td>10 Notification Given to Dept. to Proceed w/PRR from the CSC Rep. (via email)</td>
<td></td>
</tr>
<tr>
<td><strong>Directory Info. Affidavit Letter &amp; Form (if applicable) sent to customer from CSC Rep.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Signed Directory Info. Affidavit Received back at CSC</strong></td>
<td></td>
</tr>
<tr>
<td>12 Final letter returned to CSC rep. signed by Director of District Communications</td>
<td></td>
</tr>
<tr>
<td>13 Final Letter sent with information to customer from Director of District Communications</td>
<td></td>
</tr>
<tr>
<td>15 PRR emailed or mailed to customer</td>
<td></td>
</tr>
<tr>
<td>16 Make a copy of the check for your file. Bring it to Accounting with a copy of the Memo to the Dept. &amp; a copy of the Invoice</td>
<td></td>
</tr>
<tr>
<td>17 Close request in HEAT Database</td>
<td></td>
</tr>
<tr>
<td>18 Take off Pending PRR Spreadsheet (Located in Shared Folder on the desktop)</td>
<td></td>
</tr>
<tr>
<td>19 Add to Closed PRR Spreadsheet (Located in the Shared Folder on the desktop)</td>
<td></td>
</tr>
<tr>
<td>20 File the hard copy of the PRR in the drawer (by month logged in HEAT) and/or scan onto disk</td>
<td></td>
</tr>
</tbody>
</table>
**Measurement Tool for Records Disposition (to determine volume disposed)**

**EXHIBIT I**

**RECORDS VOLUME CONVERSION TO CUBIC FOOT MEASUREMENTS**

<table>
<thead>
<tr>
<th>File Folder Drawers</th>
<th>Cu. Ft.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter-size drawer or box</td>
<td>1.5</td>
</tr>
<tr>
<td>Legal-size drawer or box</td>
<td>2.0</td>
</tr>
<tr>
<td>Letter-size, 36&quot; shelf</td>
<td>2.0</td>
</tr>
<tr>
<td>Legal-size, 36&quot; shelf</td>
<td>2.5</td>
</tr>
</tbody>
</table>

**Note:**
- A standard size box | 1.5 |
- A letter size xerox box | 1.5 |
- A legal size xerox box | 2.0 |

<table>
<thead>
<tr>
<th>Shelf Units</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter, 36” long</td>
<td>2.4</td>
</tr>
<tr>
<td>Legal, 36” long</td>
<td>3.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Map or Plan Drawer</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2” $\times$ 26” $\times$ 38” (flat)</td>
<td>1.1</td>
</tr>
<tr>
<td>2” $\times$ 38” $\times$ 50” (flat)</td>
<td>2.2</td>
</tr>
<tr>
<td>4” $\times$ 26” $\times$ 38” (flat)</td>
<td>2.3</td>
</tr>
<tr>
<td>4” $\times$ 38” $\times$ 50” (flat)</td>
<td>4.4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Map or Plan Tubes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2” $\times$ 2” $\times$ 38” (roll)</td>
<td>0.1</td>
</tr>
<tr>
<td>2” $\times$ 2” $\times$ 50” (roll)</td>
<td>0.1</td>
</tr>
<tr>
<td>4” $\times$ 4” $\times$ 38” (roll)</td>
<td>0.3</td>
</tr>
<tr>
<td>4” $\times$ 4” $\times$ 50” (roll)</td>
<td>0.5</td>
</tr>
</tbody>
</table>

**Link to Exemptions**

[http://districtcommunications.brevardschools.org/RecMgt](http://districtcommunications.brevardschools.org/RecMgt)

**Link to GSL-S1 and GS-7**

[http://districtcommunications.brevardschools.org/RecMgt/GeneralSchedules_index.htm](http://districtcommunications.brevardschools.org/RecMgt/GeneralSchedules_index.htm)

**Link to Records Disposition Document**

## Records Inventory Worksheet

### Records Inventory Worksheet

<table>
<thead>
<tr>
<th>Department/Section</th>
<th>Contact</th>
<th>Phone No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location of Records</td>
<td>Schedule No.</td>
<td>Item No.</td>
</tr>
<tr>
<td>Room</td>
<td>File</td>
<td></td>
</tr>
<tr>
<td>Records Series Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record/File Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description (Contents, Purpose, and Use: Include form title and numbers, if any)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Record Copy
- Duplicate Copy

<table>
<thead>
<tr>
<th>File Type</th>
<th>Cut-Off Date</th>
<th>Arrangement</th>
<th>Authorization for Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Calendar Year</td>
<td>Alphabetical by</td>
<td>a. Statute</td>
</tr>
<tr>
<td>Case/Business Activity</td>
<td>Fiscal Year</td>
<td>Alphanumeric by</td>
<td>b. Regulations</td>
</tr>
<tr>
<td>Working Papers</td>
<td>Anniversary</td>
<td>Numeric by</td>
<td>c. Administrative</td>
</tr>
<tr>
<td>Reference</td>
<td>Continuous</td>
<td>Chronological by</td>
<td></td>
</tr>
<tr>
<td>Index</td>
<td></td>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Record Form</th>
<th></th>
<th>Authorization for Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 1/2&quot; x 11&quot; paper (letter size)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 1/2&quot; x 14&quot; paper (legal size)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bound books, catalogs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3&quot; x 5&quot; Cards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4&quot; x 6&quot; Cards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11&quot; x 15&quot; computer printouts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11&quot; x 8 1/2&quot; computer printouts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roll microfilm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microfiche</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Electronic Records Filing**

a. What is the name of the system?
b. Who owns the system?
c. What operating system is needed to retrieve and view files?
d. What application software is needed to retrieve and view files?
e. What is the file format? (doc, xls, tif, rtf, etc.)
f. What is the current age of media on which records are stored? (1 year, 5 years, etc.)
g. How quickly is this information usually needed? (within minutes, days, weeks, etc.)
h. How often is this information accessed? (daily, weekly, monthly, etc.)
i. What business activity do these records support?
j. Are there any records related to these records?
k. Do you need more assistance with assessing these records?

### Current Holdings

<table>
<thead>
<tr>
<th>Year (Inclusive Dates)</th>
<th>Paper</th>
<th>Electronic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cubic Feet</td>
<td>Bytes/Item Count</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type Filing Equipment Used</th>
<th>Quantity</th>
</tr>
</thead>
</table>

Other: the year, 5 years, etc.
Guidelines for Student Record Retention

1. Records are kept in the school for **3 years** after graduation or separation from the district when student is not expected to return to a Brevard school.

2. At the end of the 3 year period, all records eligible for archive should be carefully purged prior to sending them to the Customer Service Center. The appropriate contents of these records are defined at the end of this guideline.

3. The records should be placed in a box clearly marked on the outside with the school name, school year of separation, and a summarized alphabetic list of contents (example A-F).

4. A log sheet containing a listing of student records being archived should be typed and included in the box with the records.

5. When log sheets are completed and records are boxed please fill out and complete a DCR form from your school to the Customer Service Center and the Warehouse will pick up the records.

**Important**
After being purged, the contents of records should include only the following information:

1. The cum folder jacket
2. The final student transcript
3. Immunization record
4. The blue Elementary school card (if available)
5. The yellow Middle school card or transcript (if available)
6. If no cards or student transcript exist - send documents identifying student number, student name, student birth date, student social, and parent name

If you have any questions concerning these instructions please call Customer Service at ext. 500 for assistance.

Student Records Preparation Instructions

Instructions for **ALL SCHOOLS**

1. All transcripts and records requests (including those written on the cumulative (CUM folder) are permanent information and must be included with the records sent to Records Management.

2. Permanent and Category A information from our district, out-of-district, or private schools **should be included** in the records sent to Records Management for each student who transferred out-of-district, withdrew, or graduated during the school year(s) listed beside your school’s name.

3. The document imaging system requires four index keys to be typed or printed on the CUM FOLDER:
   - Student’s Full Name (including Middle Initial if available)
   - Social Security Number
   - Student Number
   - Date of Birth

4. If a SSN is not available, ensure that the other three index keys are included and indicate that there is no SSN.
5. **NEVER** cut up and/or paste permanent record cards, CUM folders, or any documents containing Permanent Category A information.

6. **Remove all pictures, staples, and paper clips from the records**

7. Make sure the records are legible and the print is dark enough to read. If you send light copies of records, or if the writing is not legible, it will be impossible to read when the document is scanned. If the writing is light trace over it with a dark pen.

8. All records should be placed in a box no bigger than a copy paper box. Include a list of student names, student #s and year of separation in the box. Please stack documents neatly and in **ALPHABETICAL ORDER**.

9. All Temporary and Category B records that are purged from the CUM folders may be destroyed **ONLY** after documenting the volume, method of disposal, disposal date on the annual Records Disposal Certification.

10. Submit Permanent and Category A information to Records Management using the Student Records Transmittal/Receipt form and a DCR form for the warehouse to pick up records.

**SPECIFIC INSTRUCTIONS FOR ELEMENTARY SCHOOLS ONLY**

1. Permanent and Category A information from our district, out-of-district, or private schools should be included in the records to be sent to Records Management for each student that has transferred out-of-district, withdrew or graduated during the school year(s) listed by your schools name.

2. Include **ALL REPORT CARDS (last/Final)-BLUE CARD** for all grades and **ALL IMMUNIZATION RECORDS** from all schools that the student attended (our district, out-of-district, or private schools) with the records sent to Records Management.

**SPECIFIC INSTRUCTIONS FOR MIDDLE AND HIGH SCHOOLS ONLY**

1. Permanent and Category A information from our district, out-of-district, or private schools should be included in the records to be sent to Records Management for each student that has transferred out-of-district, withdrew or graduated during the school year(s) listed by your schools name.

2. Include **ALL REPORT CARDS (last/Final)-BLUE CARD, TRANSCRIPTS** for all grades and **ALL IMMUNIZATION RECORDS** from all schools that the student attended our district, out-of-district, or private schools) with the records sent to Records Management.

1 Formula used in spreadsheet located at


2 This charge is authorized by Section 119.07(4)(d), Florida Statutes, and Department of State Rule 1-2.0031(2)(a), Florida Administrative Code, which is entitled “Public Records Requests: Special Service Charge.”
ACKNOWLEDGEMENTS

The following sources were quoted in preparation of this manual:

Florida Department of State, State Library and Archives of Florida, “The Basics of Records Management”

Florida Department of State, State Library and Archives of Florida web site

Chapter 1B-24, Florida Administrative Code, Public Records Scheduling and Dispositioning

Chapter 1B-26, Florida Administrative Code, Electronic Recordkeeping

Florida Department of State, State Library and Archives of Florida, “Electronic Records and Records Management Practices”

Chapter 119, Florida Statutes

City of Melbourne Records Management Manual (2011)


Florida Attorney General Advisory Legal Opinion AGO 85-87 (machine readable files, “intermediate files”)

Florida Attorney General Opinion AGO 2009-19 (records, municipal Facebook page)