



## SECTION 504 RECORDS PROCEDURE (INS-P043)

Clarksville-Montgomery County School System

### 1.0 SCOPE:

- 1.1 This procedure outlines the process for transferring, storing, and maintaining Section 504 files at the Central Office.

### 2.0 RESPONSIBILITY:

- 2.1 District Section 504 Coordinator

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

### 3.0 APPROVAL AUTHORITY:

- 3.1 Chief Academic Officer

### 4.0 DEFINITIONS:

- 4.1 **Cumulative Folder:** Student's permanent record
- 4.2 **Section 504 Historical File:** For a student who is currently has or has previously had a Section 504 service plan. Contains current or most recent eligibility documentation, to include any medical evaluations, last two (2) 504 service plans and meeting minutes.
- 4.3 **Notification of Record Destruction:** CMCSS district website

### 5.0 PROCEDURE:

- 5.1 **In-District Student Transfers:** All Section 504 records are sent with the original cumulative folder to the new CMCSS school (Attachment A of [GUI-P001](#) and [GUI-P002](#)).
- 5.2 **Out-Of-District, Private School, Home School Transfers:** All original Section 504 records are stored in a secure file room two (2) years elementary, one (1) year Middle/High (Attachment A of [GUI-P001](#) and [GUI-P002](#)). Copies of current eligibility and Section 504 service plans send to new school upon request.
- 5.3 Any Section 504 records for students who have **exited services** should remain with the school two (2) years elementary, one (1) year Middle/High. The entire folder should be sealed in a manila envelope with the student's name, D.O.B, and labeled 504 inactive.
- 5.4 After two-year period (elementary) or one year period (Middle/High), Section 504 historical file is to be sent to the Accountability Department at the Central Services South. Records will be stored at Central Services. Elementary school records will be stored for three years and Middle and High school records will be stored for four years at Central Services South. Following the completion of the fifth cumulative year of storage, on the date of June 30 of each year, all eligible files will be shredded.
- 5.5 Parents in need of records after they have been transferred from the school buildings, should make a request to the District 504 Coordinator.
- 5.6 Student records are reduced to the **current or most recent eligibility packet, any medical documentation, last two (2) Section 504 service plans, and meeting minutes**. Sensitive documents not required **must** be shredded. Records that arrive in any other format will be sent back to the school.



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- 5.7 Include alphabetic list of students' records that are sent including whether the student has withdrawn or graduated. Records processing cannot occur without the list. Records that arrive without a list will be sent back to the school.
- 5.8 Elementary Schools will send records after a two-year period. Middle and High Schools will send records after a one-year period. Records are packed alphabetically in boxes. Boxes are labeled with school name and addressed to Central Serves South: Section 504 Coordinator.

### 6.0 ASSOCIATED DOCUMENTS:

- 6.1 Rules For Student Record Disposition, Attachment A and B of [GUI-P001](#) and [\(GUI-P002\)](#)
- 6.2 Preparation Of Student Records For Storage/Transfer Procedure [\(GUI-P002\)](#)
- 6.3 Sending Cumulative Records from High to Central Office [\(REC-W003\)](#)
- 6.4 Sending Cumulative Records from Elementary and Middle to Central Office [\(REC-W004\)](#)
- 6.5 Special Populations Record Procedure [\(SPE-P007\)](#)

### 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Section 504 File	Central Services South upon graduation, death, or one to two years after transferring out of CMCSS	Central Services South: Elementary Records - 3 years, Middle School and High School Records – 4 years  Central Records – Permanent Cumulative Records	None – permanent Cumulative Records at Central Records	Secure offices

### 8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
5/11/21		Initial Revision
7/28/22	A	Updated information throughout (Section 5.4, 5.5, 5.8) to include more specific information about records storage and retention.

### 9.0 FLOWCHART:

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9.1 A flowchart detailing this process can be found below.

