



## **Records Management Policy**

The Board provides that all Channing Hall records are managed in an efficient and responsible manner. Therefore, the Board delegates to the Administration the responsibility for maintaining, classifying, preserving, accessing, and destroying school records in compliance with the Government Records Access and Management Act (GRAMA), Utah Code §63-2, as annotated in 1991.

### **I. Records Management**

- A. Channing Hall records shall be managed under the Administration, Business Manager, and designated staff.
- B. The Business Manager is designated as the records officer for documents related to fiscal matters such as property, budgets, payroll, accounts, contracts, etc.
- C. The Business Manager and Administrative Assistant are designated as the records officer for all records related to students.
- D. The Business Manager shall be the records officer for all records related to employees.
- E. The Head of School/Principal is designated as the chief administrative officer for the school and is the individual to whom appeals are addressed in the event of GRAMA denials.

### **II. Records Classification**

All Channing Hall records shall be classified as public, private, controlled, protected, or exempt.

#### **A. Public Records**

1. Public records shall include:
  - a) Official minutes, actions and decisions of the Board of Trustees and School Administration, unless these records include information that is classified as private, controlled, or protected.
  - b) Official school policies, contracts, minutes, and accounts.
  - c) Names, gender, job titles, job descriptions, business addresses, business telephone numbers, gross salaries, working hours, and dates of employment of all current and former employees.
  - d) Documents showing formal criminal charges against an employee, unless, in the judgment of the Head of School, the charges are groundless or the charges are not sustained.

2. Public records shall be open for public inspection during regular office hours. It is most helpful and convenient if records requests are received in advance of a requester seeking to view public records at the school.

**B. Private Records**

1. Private records shall include:
  - a) Personnel files including applications, nominations, recommendations, evaluations, and proposals for advancements or appointments.
  - b) Documents related to eligibility for unemployment benefits, social services, welfare benefits, personal finances, individual medical condition, and military status.
  - c) Individual student records.
  - d) All other records and record categories identified under U.C.A. 64G-2-302
2. Private records shall be open only to the subject of the record and other authorized individuals or agencies. Access to student records shall be provided in accordance with the Family Educational Rights and Protection Act (FERPA).

**C. Controlled Records**

1. Controlled records shall include records containing medical, psychiatric, or physiological data on an individual which, if disclosed, could be detrimental to the individual's mental health or safety.
2. All other records or record categories identified under U.C.A. 63G-2-304
3. Controlled records shall be open only to authorized persons or agencies, but will not be open to the subject of the record.

**D. Protected Records**

1. Protected records shall include:
  - a) Any information that, if disclosed, would jeopardize the life or safety of an individual or the security of school property or programs.
  - b) Documents that, if disclosed, would place the school at a disadvantage in contract negotiations, property transactions, or bargaining position, or could enable circumvention of an audit.
  - c) Records related to potential litigation or personnel hearings.
  - d) Records generated in meetings that are closed in accordance with the Utah Open and Public Meetings law (U.C.A. 52-4).
  - e) Student test or assessment questions.
2. All other records or record categories identified under U.C.A. 63G-2-305
3. Protected records shall be open only to authorized individuals and agencies or in response to court order.

**E. Exempt Records**

1. Exempt records shall include student records that are protected by the Family Educational Rights and Protection Act (FERPA).

**III. Access to School Records**

- A. Requests to review or receive school records should be addressed to the appropriate records officer during regular business hours using the form found at: <https://archives.utah.gov/recordsmanagement/forms/GRAMA-request-form.pdf>
- B. Individuals requesting to view records classified as private, controlled, or protected shall be required to prove their right to access the record through personal identification, written release from the subject of the record, power of attorney, court order, or other appropriate means.
- C. The Records Officer shall determine whether access to the requested record(s) is to be granted or denied.
  - 1. If the request is approved, the records shall be provided as soon as possible and not more than ten (10) working days from the date the request was received or consistent with U.C.A. 63G-2-2.
  - 2. If the request is denied, the Records Officer shall respond consistent with U.C.A. 63G-2-205.
- D. Parents, eligible students and other authorized individuals may review student records at the school, with the supervision of a designated school employee and consistent with the Channing Hall [FERPA policy](#)

#### **IV. Copying School Records**

- A. Channing Hall shall refuse to allow duplication of copyrighted materials (except in accordance with educational copyright laws and with respect to educational materials).
- B. Channing Hall shall charge 10 cents per page for duplicating records, plus the cost of labor involved at the rate of \$25 per hour.
- C. Channing Hall will not duplicate or allow for duplication of student records unless an authorized individual lives more than 50 miles (one way) from the school.

#### **V. Retention and Classification of School Records**

- A. Channing Hall adheres to the general schedule for records retention approved by the State Records Committee.
- B. Records that are not covered by the general schedule shall be submitted to the State Records Committee for scheduling.
- C. Only those confidential records required for retention at the school as per state guidelines.
- D. shall be retained. The school will not retain other confidential records.
- E. Channing Hall may classify a record upon receipt of a records request.