

Topic:	Ontario Student Records (OSR)
Effective:	May 2014
Cross-Reference:	Ontario Student Record (OSR) Guideline, 2000 (revised 2020) Education Act, RS 1990, c.E.2, S.8(1) (27); OSR Guidelines 2000, 2014. English Language Learners, ESL and ELD Programs and Services: Policies and Procedures for Elementary and Secondary Schools, Kindergarten to Grade 12 (Section 2.8.4) HDSB Safe and Accepting Schools Policy HDSB Administrative Procedures: Registration and Admission of Pupils; Suspensions and Expulsions; Exclusion of Students; Ontario Student Transcript Manual (2013)
Review Date:	September 2021, November 2018
Revision Date:	September 2024
Responsibility:	Superintendent of Education (School Operations)

PREAMBLE

The Ontario Student Record (OSR) is governed by the policies of the OSR Guideline 2000 issued under Section 8 (1) (27) of the Education Act.

The Ontario Student Record (OSR) is the record of a student's educational progress through schools in Ontario. The Education Act requires that the principal of a school collect information "*for inclusion in a record in respect of each pupil enrolled in the school and to establish, maintain, retain, transfer and dispose of the record*".

Ontario Student Records are to be maintained for all students in compliance with the Education Act, Municipal Freedom of Information and Protection of Privacy Act and all applicable regulations and guidelines of the Government of Ontario and the policies and procedures of the Halton District School Board.

The Act also regulates access to an OSR and states the OSR is "*privileged for the information and use of supervisory officers and the principal and teachers of the school for the improvement of instruction*" of the student. Each student and the parent(s)/guardian(s) of a student who is not an adult (that is, a student who is under the age of eighteen) must be made aware of the purpose and content of, and have access to, all of the information contained in the OSR.

PROCEDURES:

The following procedures outline the Halton District School Board's compliance with the policies set out in Ontario Student Record (OSR) Guideline, 2000 (revised 2020), which are located on the Ministry of Education website: <http://www.edu.gov.on.ca/eng/document/curricul/osr/OSRhtml>

These procedures:

- identify those who are responsible for maintaining OSRs;
- outline additional criteria and procedures for the OSR specific to the Halton District School Board schools; and
- implement mandatory changes as indicated within the guideline.

Establishment and Responsibility of the OSR

The principal is responsible for the use and maintenance of the OSR and for assigning tasks related to that function to appropriate staff. Refer to [Appendix 2: OSR Maintenance Checklist](#).

“Clerical Functions” means filing, establishing, maintaining, requesting and transferring OSRs. In addition, in secondary schools, it means creating Ontario Student Transcripts, removing outdated Ontario Student Transcripts and removing duplicate report items older than 5 years except for the “OSOR Card”. Persons who may be assigned clerical functions with respect to the establishment and maintenance of the OSR include:

- School personnel designated by the principal
- Teachers
- Early Childhood Educators (ECEs)

OSR Folder

HDSB only keeps a copy of records of legal guardianship. All other documents are verified to have been seen during the registration process, but copies are **not** retained. Refer to *HDSB Registration and Admission of Pupils Administrative Procedure* regarding required documents used during the registration process (see also, “*Verification of Documentation for School Registration*” form).

In addition to the name of each school attended, the teacher contact will be designated by the principal.

There will be a minimum of one photograph in each of: Kindergarten, Primary, Junior and Intermediate Divisions.

No information in the OSR shall disclose contravention or alleged contravention by the student of any statute or regulation to which the Youth Criminal Justice Act or Part V-A of the Provincial Offences Act applies.

Contents of the OSR Folder

The organization of OSR contents outlined below is intended to be from the front to the back of the OSR:

1. an OSR folder
2. report cards
3. an Ontario Student Transcript, where applicable
4. a documentation file, where applicable
5. an office index card
6. additional information identified as being conducive to the improvement of the instruction of the student

Report Cards

- Report cards shall be filed in reverse chronological order (i.e., most recent on top).
- For students in Grades 1 through 8 who are not receiving a provincial report card, the only alternate report card is the IEP.
- For students in Grades 9 through school leaving, who are not receiving a provincial report card, the only alternate report card is the IEP, accompanied by page 3 of the Provincial Report Card.
- All Kindergarten students will receive a report called Kindergarten Communication of Learning: Initial Observations Kindergarten in November and two more Kindergarten Communication of Learning in February and June.

Ontario Student Transcript (OST)

- An official copy of the OST, which does not need to be on official OST form if the student is remaining within the HDSB, as per 2013 OST Guidelines, will be filed in the OSR upon graduation, transfer and retirement.
- At all other times the OST will be maintained as an electronic file.

Students may require a copy of their Ontario Student Transcript (OST) upon:

- transferring to another secondary school,
- applying to a private post-secondary training program, college or university,
- transferring to a school outside of Ontario,
- graduating,
- leaving school,
- applying for a scholarship or bursary, or
- applying for a job.

OSTs will be provided to retired students on request for a fee of \$20.00 for the first 2 copies of a transcript and a \$5.00 fee for each additional copy if requested at the same time.

Requests for OST:

- Through the secondary school: Two weeks prior to the start of school in September through the first week of July
- J.W. Singleton Education Centre - School Operations: From the second week of July to the up to two weeks prior to the first day of school in September

Documentation File

The following shall also be included in the Documentation File. Refer to [Appendix 1: Storage and Disposition of OSR and Contents](#).

Special Education

- All IEPs and IEP parent/guardian contact records
- All Letters of Invitation to IPRC (copy)
- All IPRC Waiver Letters (copy)
- School Psychological Services Memo - notification of assessment completion
- Educational, psychological and health assessments (i.e., psychology, speech-language, CCAT results)
- Consent Directive from Psychological Services and/or Speech - Language Services
- Professional Services Consultation Consent Form
- Behaviour Plans / Safety Plans (most recent only and removed at Principal's discretion)

Safe Schools

- Components of VTRA: Plan of Action, Summary Report, and Intervention Plan
- Suspension Letters including attached Safe Schools Incident Reporting Forms and, if applicable, Violent Incident Form
- Letters confirming expulsion from one school or all schools of the Board
- Items that do not get filed in the OSR:
 - Exclusion letters
 - Any documentation relating to young offenders and the Youth Criminal Justice Act (YCJA)
 - Completed 'VTRA Editable Forms Package'

School Program

- Early Leaver Referral and Documentation
- EQAO exemption permission letters
- EQAO Letter of Results (Grades 3 and 6 Provincial Assessments, Grade 9 Mathematics)
- Grade 10 Ontario Secondary School Literacy Results
- French Exemption Forms in Core French (Grades 4 - 8)
- Demission Forms for French Immersion (Grades 2 - 12)
- Student Record of Accumulated Instruction in French as a Second Language
- Community Involvement Hours documentation
- Credit status (e.g., substitution, credit recovery, correspondence, Music Certificates accepted for Credits, equivalent Out of Province/Country documentation and forms)
- Prior Learning Assessment and Recognition (PLAR) Challenge for Credit, Cumulative Tracking Record
- Credit Recovery Learning Plan and Forms (HDSB Course Placement Form)
- Initial or ongoing language assessment form (Halton Forms Engine - HFE)
 - Elementary updated and replaced annually in May (previous year shredded securely)
 - Secondary students in ESL/ELD programming have their forms updated and replaced at the end of each semester
 - Secondary students outside of ESL programming have their forms updated and replaced once per school year
 - Initial or Ongoing language assessment forms from other boards may be retained in the OSR

- Forms removed from OSR are to be shredded (HFE retains an electronic copy of past forms)

Other

- Student Registration Form
- Verification of Documentation for School Registration (if required); where a student is registering through the Welcome Centre, the Welcome Centre will forward/insert the “Letter of Acceptance” from a recognized post-secondary institution to the school that will be placed into the OSR
- Copy of records of legal guardianship
- Prolonged Absence Referral Form
- Withdrawal from Parental Control Form

Notes:

1. All letters being filed in the OSR shall contain a notation to that effect (i.e., copy: OSR).
2. Prior Learning Assessments and Recognition (PLAR) Challenge for credit.
3. Third party reports received but returned to sender should be noted in this section (e.g., doctor’s letters, discharge report).
4. Refer to [Appendix 5: Sample Documentation](#)

Change of Name or Gender

By Repute

- If a student’s name or gender changes by repute, the OSR will be filed under the requested name and a card will be placed in the sequence where the legal name would appear.
- The legal name and gender must always be retained on the hard copy and electronic copy of the OSR
- Documents in the OSR will continue to reflect the legal name and gender (provincial reports, Ontario transcript)
- The school will change the “preferred name” and lived gender in Student Information System, resulting in this name being displayed on class lists
- Upon request, schools will make manual changes to a student’s copy of report cards, the OST, and diplomas to reflect the name / gender of repute
- Secondary schools will register all new grade 9 students from the OSR file in order to make certain that the electronic file contains the legal name
- The principal will record the name by repute in Part A of the OSR folder in addition to the legal name that will be enclosed in brackets. Revision of documents contained within the OSR regarding name and gender change must be supported by legal documentation where the change is:
 - *By Marriage* - If a student’s surname changes by marriage, the school will file a copy of the confirming document, or a verification of their knowledge of the document, in the documentation file, and will change the surname of the student on all current and future components of the OSR
 - *By Law* - If a student’s full name or gender changes, pursuant to legal documentation, the school will change all current and future components of the OSR to reflect the change. Upon request, all past components of the OSR will be changed so that it will appear as if originally established in the changed name or gender.

Security of OSR

The principal will designate the person or persons who shall maintain the security of the student records.

- Security of the OSR must be provided for both current and inactive OSR files.
- Electronically stored OSR data must comply with the same access and security provisions as the hard copy. Staff shall follow the “Protecting Board Owned Mobile Devices Administrative Procedure”.

All parts of the OSR must be stored in filing cabinets. The filing cabinets may be left unlocked during normal office hours. The files should be located in areas of restricted access. Filing cabinets will be secured at times beyond normal office hours. If possible, the filing cabinets will be kept in rooms with lockable doors. The OSR files will remain in the school at all times except at a meeting sanctioned by a Supervisory Officer or the Principal.

If it is necessary for authorized personnel to take OSRs out of the Guidance or main office, the personnel removing the OSR will make a record (on an OSR sign-out card) indicating the student's name, remover's name, time and date when removed and returned. In most cases, the OSR will be returned and so recorded on the same day. If it is necessary to have OSRs away from the storage area, the OSR will be stored within the school in an area which ensures that confidentiality will be maintained. It is to be returned as soon as possible.

Access to the OSR

The following personnel have the right to examine the contents of the OSR:

- the student;
- the student's parent(s) or guardian(s) if the student is under 18 years of age;
- for students who are under 18 years of age and for whom Family and Children's Services has a supervision order, the agency is the official guardian, therefore, the parent/guardian access is limited to the Family and Children's Services social worker; and
- supervisory officers, the principal, the teachers of the school (those who hold a valid certificate of qualification or a letter of standing as a teacher in an elementary or secondary school in Ontario and who are assigned to the school by the Board – includes itinerant teachers, Instructional Program Leaders who are certified teachers), and Early Childhood Educators (ECEs) for the purpose of improving the instruction of the student.

Notes:

- Access to OSR by Professional Support Services Personnel requires signed parent/guardian permission;
- Access to the OSR by students and/or their parents/guardians occurs in the presence of the school principal or designate;
- Additional Ministry and Board educational personnel may access the OSR only as directed by the Principal/Designate.

Students

- Although the non-adult student has access to the OSR, the non-adult student does not have the right to request that information be withdrawn, corrected or placed in the OSR
- The right of "consent" remains with the parent/guardian until the student reaches 18 years of age, unless the student is 16 or 17 years of age and has withdrawn from parental control.

Parents/Guardians

- A non-custodial parent has access to the record unless access is denied by a court order, divorce decree or some other legal document.

Police

- Where critical circumstances exist (imminent safety risk, support an active investigation), Police will be granted access to a student's OSR Document, the officer's name, badge number, and reason for the request.

Legal Requests

Requests from lawyers purporting to represent an individual need to be verified prior to releasing records. Principals should consult with their Family of Schools Superintendent and take steps in order to be reasonably satisfied that they are releasing records appropriately.

- Verify, do not copy, ID belonging to the individual requesting access to, or a copy of, their own records, those of their children or their clients when they arrive at the school.
- Verify that a legal representative requesting access to student records has a valid consent. Call the individual or the law firm in order to verify, to the extent possible, that the request is legitimate and the consent is valid.

Other Requests

For any further requests regarding access to the OSR, Administrators are directed to contact their Family of Schools Superintendent of Education.

Correction or removal of information in the OSR

If the student over the age of 18, parent and or guardian is of the opinion that information contained in the student's OSR is inaccurately recorded or that it is not conducive to the improvement of the instruction of the student, individuals may request that the principal correct or remove the information from the record. This decision is at the discretion of the principal. If the principal complies with the request, the material will be corrected or will be removed from the file and destroyed (shredded using Board provided service) or returned to the individual and no record of the request will be retained in the OSR. If the principal refuses to comply with the request, the individuals may request in writing that the principal refer the request to the appropriate Supervisory Officer as per Ontario Student Record (OSR) Guidelines, 2000 Section 9. See [Appendix 3: Storage and Disposition of Documentation for Students Enrolled in Adult Day School and Alternative Education Programs](#).

Transfer of the OSR

All letters requesting the transfer of OSR records from Halton DSB schools will be filed in a binder and retained for one full school year beyond the year the OSR was transferred. These letters of request will be filed by schools and retained for one year.

Halton Psychological Services reports remain in the OSR when transferred.

Internal Transfer of OSR

If the original OSR is being transferred between schools operated by the same school board, it may be transferred by the inner board courier, upon receipt of an official written request from the receiving school.

Transfer to School in Another Board, or to a Provincial or Demonstration School in Ontario

Before a principal transfers an original OSR to a school operated by another school board in Ontario, or to a Provincial or Demonstration School in Ontario, the principal must receive a written request for the information from the principal of the receiving school.

Transfer to a Private, Federal, or First Nation School in Ontario

Before a principal transfers an original OSR to an inspected private school, a non-inspected private school, or a federal or First Nation school in Ontario, the principal must have received:

- a written request for the information from the receiving school, in which the school agrees to accept responsibility for the OSR and to maintain, retain, transfer, and dispose of the OSR in accordance with the Ontario Student Records Manual (2000); and
- a written statement indicating consent to the transfer, which is signed by the parent(s)/guardian(s) of the student if the student is not an adult, or by the student if they are an adult.

This provision applies to federal and First Nation schools in Ontario that:

- have chosen to establish and maintain OSRs for their students; and
- are prescribed under section 3 of [Ontario Regulation 261/19](#), "Reciprocal Education Approach" (see [list of eligible schools](#)), or that have an existing Reverse Education Services Agreement with the board that was entered into prior to September 1, 2019.

Before a principal transfers an original OSR to an inspected private school, a non-inspected private school, or a First Nation school in Ontario that is not specified in the list [of eligible schools](#), the principal must have received:

- a written request for the information from the receiving school, in which the school agrees to accept responsibility for the OSR and to maintain, retain, transfer, and dispose of the OSR in accordance with the guidelines; and
- a written statement indicating consent to the transfer, which is signed by the parent(s) of the student if he or she is not an adult, or by the student if he or she is an adult.

Transfer to an Educational Institution Outside of Ontario

An original OSR may not be transferred outside Ontario. Only an exact copy of the OSR may be sent to the principal of an educational institution outside Ontario after the principal who is responsible for the OSR has received:

- a written request for the information from the principal of the educational institution outside Ontario; and
- a written statement indicating consent to the transfer, which is signed by the parent(s)/guardian(s) of the student if the student is not an adult, or by the student if they are an adult.

Surrendering an OSR

There are restrictions placed on the use of the Ontario Student Record (OSR) in court proceedings (Subsection 266(2) of the Education Act). If an OSR must be surrendered and/or removed from the school as a result of a search warrant, subpoena or court order, the principal shall follow the procedures in section 4.5 and ensure:

- In all cases, the principal shall contact the appropriate Superintendent of Education and Manager of the Director's Office to determine whether to seek a legal opinion from the Board's solicitor before taking action.
- The individual requesting the OSR does hold the position of authority that is claimed and the action taken is documented and includes the signature of the official receiving the OSR

Note: All materials in the OSR should be dated.

OSR Review Procedures

The Principal is responsible for making certain that the review, removal, destruction and retention of information in the OSR complies with the OSR Guideline and policies set by the Board.

Under certain circumstances the OSR may be reviewed by the principal, or their designate, and information in the OSR may be removed upon authorization from the principal. A person designated by the principal is to be a member of the instructional staff who has received the required instruction and criteria for conducting the review.

Information may be removed from a current student OSR or from a retired student OSR, however, the rules for each circumstance are unique. Refer to [Appendix 1: Storage and Disposition of OSR and Contents](#).

Current Student OSR:

A current student OSR is considered to be that of any enrolled student who is not retired. A student retires from school when they cease to be enrolled in school. A student is not considered to have retired when they:

- A. withdraw for a temporary period, or
- B. transfer to another school in Ontario.

Reviews of current student OSRs occur when a student transfers to/from another school or, periodically, when routine maintenance is performed on the file of a student at the school, typically in its day-to-day use. In both cases if certain information or material in an OSR folder is determined to be no longer conducive to the improvement of the instruction of the student, the principal must authorize the removal of the item(s).

The removal of information included in the OSR should be judged case by case guided by the following:

- Is the information accurate?
- Is the information current?
- Will the information assist in the improvement of instruction?
- Is the student (or parent/guardian, where the student is not an adult) informed of the removal of the information?

The OSR should be reviewed by the principal, or the principal's designate. This will help ensure that the information contained in the OSR is relevant, accurate and conducive to the student's education. Retired

Student OSR:

When the student retires from school, the OSR is reviewed by the principal, or the principal's designate. Refer to [Appendix 1: Storage and Disposition of OSR and Contents](#) for instructions regarding what to securely shred, what to keep, where to store and for how long.

Important Notes for Current and Retired OSRs:

The only acceptable method of disposal of records from an OSR is secure shredding as provided by the Board.

No documentation related to the IPRC process, including IEPs, should be removed from the Documentation File as part of a review of a current OSR.

For further guidance on retention and removal of records in the OSR, refer to [Appendix 1: Storage and Disposition of OSR and Contents](#).

Disposal of OSR Materials

As materials are removed from OSR and are no longer conducive to the improvement of instruction:

- All materials will be placed in a secure on-site shredding box as contracted by the HDSB.
- Materials removed for shredding shall be kept secure from invasion of privacy at all times.
- All materials removed from the OSR shall be destroyed under conditions that ensure the complete and confidential disposal of the record, or returned to the sender.

Refer to [Appendix 1: Storage and Disposition of OSR and Contents](#).

OSOR Cards or Office Index Cards

The OSOR Card (Office Index Card) provides the school with immediate access to information about a student and is stored separately from the OSR folder. Security, storage and disposal procedures apply equally to the OSOR Card as well as to the OSR folder. The OSOR Card is always retained by the sending school upon transferring the OSR file. Each school must maintain active and inactive Office Index Files.

The OSOR Card may also include the following information:

- Doctor's name and phone number
- critical health factors as reported on the Registration or Verification Form by parent/guardian or student if 18 years or older
- parent/guardian contact information
- number of siblings in the same school
- person with whom student resides
- additional information supplied by parent/guardian
- homeroom class
- current grade
- previous school and board
- citizenship, date of entry, tuition fees
- enrolment in French Immersion in current year
- school may include additional information provided by the parent/guardian for the safety and well-being of the student

APPENDIX 1

Storage and Disposition of OSR and Contents

Description	Storage	Duration	Disposition	Disposition
			transfer within HDSB	transfer to another ON Board
Ontario Student Record (OSR) Folder	Secure (locked) filing cabinets	55 years after student retires from school	to new school not packaged with other materials clearly labeled as OSR(s)	upon written request send via courier
OSOR Cards (Office Index Cards)	Secure (locked) filing cabinets	55 years after student retires from school	retain most recent copy at the originating school, file separately from OSR	
Ontario Student Transcript (OST)	Within OSR	55 years after student retires from school	Filed in OSR	in OSR
Assessment (Psychological, Speech/Language, Health, Behaviour)	with parent/guardian permission OSR - Documentation File	5 years after student retires from school	yes	yes
Assessment - Principal letter of response to parent/guardian refusal of permission for recommended assessment	OSR – Documentation File	5 years after student retires from school	yes	yes
Behaviour Plans	OSR – Documentation File	5 years after student retires from school	yes	no
Community Involvement Record	OSR – Documentation File	5 years after student retires from school	in OSR	in OSR
Correction and / or Deletion - Request not granted	OSR – Documentation File	5 years after student retires from school	yes	yes

Credit Status (substitute credits, credit recovery, equivalency (PLE), PLAR)	OSR	5 years after student retires from school	yes	yes
Credit Substitution: Request and approval	OSR – Documentation File	5 years after student retires from school	yes	yes
Custody order verification	OSR – Documentation File	5 years after student retires from school	yes	yes
Demission/Exemption Forms (French, EQAO)	OSR	5 years after student retires from school	yes	yes
Early Leaver Referral Form and Documentation	OSR – Documentation File	Removed at 21 years of age	Filed in OSR	Remove if transferring to another school board
EQAO Results - Grade 3, 6, 9 Math and Grade 10 OSSLT	OSR	5 years after student retires from school	yes	yes
English as a Second Language (ESL) Reports (e.g., STEP Assessment)	OSR – Documentation File	5 years after student retires from school	yes	yes
Expulsion Letters	OSR	5 years after student retires from school	yes	yes
French Instruction - Record	OSR	5 years after student retires from school	in OSR	in OSR
Gifted Screening Results	OSR – Documentation File	5 years after student retires from school	yes	yes
Documentation of Monitoring/Medical Examination (Form C3) and Documentation for a Diagnosed Concussion: Return to Learn/Return to Physical Activity Plan (Form C4)	OSR	5 years after student retires from school	Principal's discretion	Principal's discretion

IEPs (Individual Education Plans) and Parent/Guardian Contact Records	OSR – Documentation File	5 years after student retires from school	yes	yes
I.P.R.C. Invitation Letters	OSR – Documentation File(copy)	5 years after student retires from school	yes	yes
I.P.R.C. Waiver Letters	OSR – Documentation File	5 years after student retires from school	yes	yes
I.P.R.C. Statement of Decision	OSR – Documentation File (copy)	5 years after student retires from school	yes	yes
I.P.R.C. Parental/Guardian letter of request for meeting, discussion or appeal and Principal's Response Letter	OSR – Documentation File copy to I.P.R.C. manager	5 years after student retires from school	yes	yes
Intensive Support Amount (ISA) status form	OSR - Documentation File	5 years after student retires from school	yes	yes
Professional Services Consultation Consent Form	OSR - Documentation File	5 years after student retires from school	yes	yes
Name by repute request	OSR – Documentation File	5 years after student retires from school	yes	yes
Prior Learning Equivalency (PLE) (including report cards / transcripts from prior learning)	OSR	5 years after student retires from school		
Prior Learning Assessment and Recognition (mPLAR) Records	OSR	5 years after student retires from school	yes	yes
Report Card - Alternate (IEP, Alternative Reports)	OSR	5 years after student retires from school	yes	yes
Progress Report and Provincial Report Card - Provincial (K - 12)	OSR	5 years after student retires from school	in OSR	in OSR

Safe Schools Incident Reporting Form - Non Violent Incident	OSR - Documentation File	<i>No action:</i> discard <i>Any action:</i> retain for a minimum of one year, may be removed at the discretion of the Principal. If not removed, this record is subject to culling 5 years after the student retires.		
Safe Schools Incident Reporting Form - Violent Incident	OSR - Documentation File	Any action other than suspension or expulsion: - 1 year Suspension or expulsion quashed, etc. - 1 year Suspension - 3 years (attach) Expulsion - 5 years (attach)		
Supervised Alternative Learning (SAL) Reports	OSR – Documentation File	5 years after student retires from school	yes	yes
School Psychological Services Memo	OSR - Documentation File	5 years after student retires from school	yes	yes
Specialist High Skills Major Record (SHSM)	OSR	5 years after student retires from school	yes	yes
Special Support Program Report	OSR - Documentation File	5 years after student retires from school	yes	yes
Surname change verification	OSR – Documentation File	5 years after student retires from school	yes	yes
Suspension Letter (no Violent Incident Form)	OSR - Documentation File	Minimum of 1 year (may be removed at Principal's discretion thereafter);	yes	yes

		5 years after student retires from school		
Expulsion Letter (No Violent Incident Form)	OSR Documentation File	5 years after student retires from school	yes	yes
Expulsion Letter with Violent Incident Form	OSR - Documentation File	5 years after student retires from school	yes	yes
Suspension Letter with Violent Incident Form	OSR - Documentation File	5 years	yes	yes
Truancy/Frequent Absence Letters	OSR	Minimum 5 years	yes	yes

APPENDIX 2**OSR MAINTENANCE CHECKLIST**

Elementary Schools – the following information can be used as a checklist:

- each student has an OSR
- each student has a Halton student number and an Ontario Education Number (OEN), recorded on the OSR
- Part B of the OSR is completed
- update Parts D, E, F, G, H and I of the OSR, as necessary
- all original copies or exact copies of the Elementary Progress Report and Provincial Report Cards (Grades 1 - 12) for the school year are stapled together (final term on top) and placed into the OSR
- all original copies of the Kindergarten Communication of Learning for the school year are stapled together (final term on top) and placed into the OSR
- once, for each division, an up-to-date student picture is dated and glued onto Part F of the OSR folder
- a Documentation File has been established and the appropriate dated documents have been inserted. These inserts are to be organized chronologically with the most recent at the front. The following legal documents must be included:
 - Letters of Invitation to IPRC
 - IPRC Waiver Letters
 - IPRC Statements of Decision
 - Intensive Support Amount (ISA) status form
 - IEP's and Parent/Guardian Contact Forms

Other appropriate dated documents to be filed in the Documentation File include:

- Educational, psychological and health assessments
- Violent Incident Forms and related Safe School Incident Reporting Form
- Suspension Letters (if related to a Violent Incident Form)
- Verification of change of surname
- Verification of custody order
- See Appendix 1 for a complete list of documentation
- a Student Record of Accumulated Instruction in French as a Second Language card has been established and updated for each student
- items that are not conducive to the improvement of instruction are removed from the OSR, at the principal's discretion and securely shredded in Board provided bins
- name changes (refer to section Change of Name or Gender)
- all items in OSR are dated
- proof of age is verified and initialed
- the OSR contents are filed in the recommended order

Secondary Schools – the following information is used as a checklist when reviewing OSRs:

- each student has an OSR
- each student has a Halton student number and an Ontario Education Number (OEN), numbers are recorded on the OSR
- Part B of the OSR is completed
- update Parts D, E, F, G, H, and I of the OSR, as necessary
- all original copies or exact copies of the Provincial and Board Report Cards for the school year are filed together (final term on top) and placed into the OSR
- at least one photograph is dated and glued onto Part F of the OSR folder
- a Documentation File has been established and the appropriate dated documents have been inserted. These inserts are to be organized chronologically with the most recent at the front. The following legal documents must be included:
 - Letters of Invitation to IPRC
 - IPRC Waiver Letters
 - IPRC Statements of Decision
 - Intensive Support Amount (ISA) status form
 - IEPs and Parent/Guardian Contact Forms

Other appropriate dated documents to be filed in the Documentation File include:

- Educational, psychological and health assessments
- Violent Incident Forms and related Safe School Incident Reporting Form
- Suspension Letters (if related to a Violent Incident Form)
- Verification of change of surname
- Verification of custody order
- See Appendix 1 for a complete list of documentation
- items that are not conducive to the improvement of instruction are removed from the OSR, at the principal's discretion and securely shredded in Board provided bins
- name changes (refer to section Change of Name or Gender)
- all items in OSR are dated
- proof of age is verified and initialed
- the OST is included, updated and filed at the beginning of the OSR
- the OSR contents are filed in the recommended order

Storage and Disposition of Documentation for Students Enrolled in Adult Day School and Alternative Education Programs

For students taking credit courses at Summer School, Continuing education day school, HOPES or full time HDSB eLearning:

The OSR will remain in the last day school in which the student was registered

- Summer School, Night School, and eLearning results are transferred to the last day school in which the student was registered, if within the Halton board. Otherwise, the report card is distributed to the student who is responsible for delivery to their last day school to ensure that their OST is updated
- Upon graduation from one of these programs, Adult and Continuing Education (ACE) requests the OSR from the day school. The records are updated and the OSR is stored in the ACE Administration secure area

Day School students who register in Summer School or Night School credit courses

- The OSR will remain in the day school
- ACE will issue and send a report card to the day school. OST is updated electronically.

Ontario Student Record (OSR) Guideline, 2000 (revised 2020)

OST (3.3)	<u>Report Cards</u> (3.2)	<u>OSR Folder</u> (3.1)	<u>Documentation File</u> (3.4)	Office Index Card (OSOR) (3.5)
	filed in reverse chronological order	Parts A-H completed as required (3.1.1-3.1.6) <ul style="list-style-type: none"> • Additional Info. (3.1.7) • date of SAL entry credit status (equivalency (PLE), substitution, credit recovery) • PLAR (3.7) • music certificates for credits • OSSLT Results • Suspension letters • Prolonged Absence Referral • French demission forms (3.6) 	<ul style="list-style-type: none"> • custody order verification • emancipated youth form • surname change verification • request for name by repute • IPRC Statement of Decision • all IEPs & IEP Parent/Guardian Contact Records • educational, psychological assessments • SAL reports • requests for deletion/correction where request not granted • letters of invitation to IPRC • IPRC waiver letters • Intensive Support Amount (ISA) Status Form • results of grade 4 gifted screening results • ESL reports • Professional Services Consultation Consent Form • School Psychological Services memo re: completion of an assessment • Principal letter of response to parent refusal of permission for recommended assessment • suspension letters (with attached Violent Incident Form and related Safe School Incident Reporting Form) • HDSB Behaviour Plans / Safety Plans • EQAO exemption permission forms • Community Involvement Hours record 	not filed in OSR not transferred with OSR

Appendix 5

OSR Documentation Section - Sample Documentation

[Appendix A: OSR Folder, Form 1A](#)

[Appendix B: Adjustment of OSR Folder Form 1 to Form 1A](#)

[Appendix C: Ontario Student Transcript](#)

[Appendix D: Documentation File Folder](#)

[Appendix E: Office Index Card](#)

[Appendix F: Student Record of Accumulated Instruction in French As a Second Language in Elementary School](#)

[Appendix G: Notification of Student Transfer Within Ontario](#)

[Appendix H: Request for an OSR by a School in Another Board, a Provincial or Demonstration School, or a Federal or First Nation School in Ontario Specified in Section 6.1](#)

[Appendix I: Request for an OSR by a Private School or a First Nation School in Ontario not Specified in Section 6.1](#)

[Appendix J: Violent Incident Form](#)

[Appendix K: Prior Learning Assessment and Recognition \(PLAR\) Challenge for Credit: Cumulative Tracking Record](#)