



Cumulative File Checklist

The following sections should be used to organize the student's file **in the order that they are listed below**:

1. Registration Documentation (all documents below must be present in file):

a. School Administration Documents

- Demographic forms (most recent on top)
- **Form 300-1: Registration Form**
- Birth certificate/proof of citizenship
- Attendance summaries (most recent on top) – required in this category if not already included on the report card
- Formal Attendance Board communication
- Alberta Student Number (ASN) certificate – if there has been one printed. The ASN recorded on the student's file is sufficient if the certificate isn't in the student's file.

Missing Documentation Form:

- Any documents missing from Section 1a must be recorded on the **Form 320-1 Missing Document Form**. In the event of a missing birth certificate/citizenship document or legal document (e.g., court order), school staff should continue to contact parents/guardians until the document is received.

b. Legal Documents (if applicable)

- Enforced court-related documents to custody and guardianship and parental access (most recent on top)
- Children's Services (e.g., temporary guardianship order)
- Other court documents impacting school programming, placement, student department or attendance (e.g., pertinent probationary conditions or restraining orders)

2. Assessment and Programming (All documents below must be present in file.)

a. Report Cards

- School yearly final report cards (most recent on top)
- PAT/SLA results
- Special program/intervention reports

b. Specialized Support Documentation (if applicable)

- Individualized Program Plans (IPPs)
- Instructional Support Plans (ISPs)
- Behaviour Support Plans (BSPs)
- Success in School Plans (SISs)
- Special Ed Change of Code Form
- Medical Management Plan Template

c. Specialized Assessment Information (if applicable)

- Non-teacher (e.g., psychoeducational assessment, OT, SLP)

d. Releases and Permission Forms (if applicable)

- Special programs (e.g., Early Intervention, Family/School/Community Resource Counselling Program)
- Consent to Obtain/Disclose Information
- Independent student consent for release of personal information to parent or legal guardian

- Non-teacher (e.g., psychoeducational assessment, OT, SLP)
- e. Pertinent Correspondence and Notes** (if applicable)
 - Suspension letters (must be kept for a minimum of one year and no longer than three years)
 - Health information or professional medical correspondence and appropriate forms related to
 - o **AP 312: Students with Severe Medical Conditions**
 - o **AP 313: Emergency Medical Treatment**
 - o **AP 314: Administering Medical Treatment**
- f. ELL (English Language Learner) Yellow Folders** (if applicable)

3. Types of documents to be removed from cumulative record (and destroyed):

- Transportation forms
- Home Logic consent forms
- Teacher assessments (e.g., reading assessments, curriculum tests/quizzes)
- Kindergarten vision screeners
- Anecdotal notes or observations
- Duplicate documents
- Rating scale protocols completed by teachers for professionals
(Originals should be sent back to the professional and no copies should be made.)
- If you find documents from psychoeducational assessments (e.g., WISC/WIAT protocols, completed history forms) please give them to your Ed. Consultant to be stored in the proper location.
- Any other documents not described in Categories 1 or 2 above
- Records relating to the students under the *Child, Youth and Family Enhancement Act*
- Any information that identifies a student as a young person as defined in the *Youth Justice Act* or the *Youth Criminal Justice Act* (Canada) and all information relating to that student in that capacity