



2.1 File Management Guidelines

GENERAL GUIDELINES

The following is a summary of guidelines for organizing special education files.

Students that have been designated with a ministry special education category will have both a general education file and a special education file. The special education file will contain documentation that supports designation in the special education category as outlined in the Ministry of Education's [Inclusive Education Services: A Manual of Policies, Procedures and Guidelines 2024](#).

Special education files are to be kept in the school's main office in a locked filing cabinet. Special education files are to be accessed only by professional staff (i.e., teaching staff and district specialists) working directly with the student. Special education files should remain in the office and be monitored by a sign in/out procedure determined by the school principal. The student file must not leave the school building.

Annual Review of all Special Education Files

Principals are responsible to ensure that all special education files comply with these guidelines and the Ministry of Education's required documentation.

Student Transfers or Withdrawals

When a student transfers to another school within the district, the special education file will be sent to the new school.

Special education files must never be sent outside of the school district. When a student withdraws from the school district, parents or guardians may request copies of the student confidential file. All other requests for sharing information housed in the special education file, the parent or guardian may initiate by completing the Informed Consent for Release of Confidential Information Form. These files must be archived in a confidential, locked filing cabinet at the school until five years after the student's anticipated graduation date.

For transfers outside of the school district, please refer to [Administrative Procedure 3300 - Student Personal Records](#).

Review and Update of Files Received from other Districts

Files received from other school districts must be reviewed by a district inclusion support teacher (DIST) to determine appropriateness of the designation, even if the student is in MyEdBC. Following the review, the school IST will review and re-format the file to align with district guidelines and submit for approval by the assistant superintendent, inclusive education.



Organization of Documentation

Using the Ministry of Education category checklists as a guide, each student's documentation must meet the criteria set out for each category. Specific special education file organization are set out in these guidelines. The file tabs listed on the following pages may include the suggested documents, if and when applicable.

Special education files are organized within a binder per student.

All documents being put in the student file must be dated.

A copy of the district inclusive education services referral and parental consent form will be stored in the IST's working file until the assessments are completed and then attached to the appropriate report and filed in the special education file.

DO NOT include the following in the student special education file/binder:

- Worker's report of injury, occupational disease, violence or near miss - file this with the principal.
- Incident investigation report - file this with the principal.
- Stage 1 BDTAM Data Form - do not include in either the special education file or the cumulative file.
 - Worrisome Behaviour Reports and BDTAM Stage 1 intervention and support plans for ministry designated category H students are filed under the "behaviour incidents tab".
 - BDTAM Stage 1 intervention and support plans for all other ministry designated and non-ministry designated students are filed in the general or cumulative file.
 - Violence in the Workplace reports, WRA forms, or Employee Safety Plans
- Severe behaviour report and/or office discipline referral (ODR) - file in general or cumulative file (except for Category H - file in behaviour training tab).
- Record of nonviolent crisis intervention of a student - file in general or cumulative file (except for Category H - file in behaviour incidents tab).
- Non-official subjective/transient notes; only include SD8 forms (e.g., SBT minutes or district reports) and other professional reports; IST working notes can be kept in the IST working file.
- Email communications - agencies to provide reports or school IST to summarize in a contact record.
- Items that include other students' names; the student file must only reflect the student in question.
- Test protocols and examples of student work; can be kept in the IST working file. The first page of the protocol should be filed in the special education file.



- Partial day forms - these will be placed in the student's general or cumulative file whether they are ministry designated or not.
- Service plans for non-ministry designated students - these are filed in the student's general or cumulative file.