**Decision Matrix for Digitizing Student Records**

Alberta Education’s Provincial Approach to Student Information (PASI) is a protected online repository of Student Documents. It creates enormous opportunities to support student learning when mandated Student Records can be transferred securely as a student moves from grade to grade, school to school, and division to division.

The project is not about scanning or imaging every document you have for every student. This document will help guide you to the questions you need to ask and the work to plan for a very successful implementation. PASI is an opportunity for digital transformation. Good records management supports your success in making available quality Student Records.

This document identifies the decisions for an Alberta School Division in preparation to digitize Student Records for upload to PASI.

| Planning Consideration | Your Readiness |
| --- | --- |
| **Information Governance** |  |
| Do you have an Administrative Procedure that establishes the Records Management Program for your organization?  |  |
| Does your Administrative Procedure include electronic records or specify that records are managed regardless of format? |  |
| Do you have an approved Administrative Procedure for Student Records Management aligned with the Student Record Regulation? |  |
| Do you have a Records Retention Schedule aligned with the recordkeeping requirements of the ASBOA Model Guideline? |  |
| Have staff been implementing a Records Retention Schedule for the disposition of Student Records? |  |
| Do you have centralized or a decentralized model for recordkeeping?  |  |
| Who is in charge of your records management program? Is this project identified as their responsibility? What resources are available for the project? |  |
| Do you have procedures and processes in place for managing information aligned with industry best practices? |  |
| Do you have a process for disposition of paper source records once scanned? Has it been approved by Senior Leadership? Is accountability assigned? |  |
| Do you know how you will be responsive to transfer requests for digital records within the school year in a timely way? |  |
| Have you aligned your Information Governance documents and strategies to the requirements of the Canadian Standards for digitizing records? |  |
| **Business Analysis**  |  |
| How much do you want to tackle? What is your capability, resourcing, existing state of your recordkeeping? |  |
| Are you able to scan and upload records for transferring students from your Division, the minimum requirement anticipated for Fall 2020? |  |
| Do you have a repository of digital records that can be uploaded? |  |
| Have you identified requirements including:Number of filesConsistency in recordkeepingNumber of transferring students annuallyAnticipated number of new studentsAnticipated number of new students transferring at each school annuallyWhat extent would you be able to manage as a project? |  |
| Do you have consistent filing within files e.g. files consistently in a particular order, only what is required stored in file, processes for handling missing required documents, checklist followed for consistency, etc.  |  |
| How much of your existing Student Records are electronic? (e.g. Registration, Report Cards, Individual Program Plans, Attendance, etc.) |  |
| Do you have an assigned Data Coordinator who has been actively engaged with the Dept. of Education? |  |
| Are you using an existing Student Information System or vendor e.g. PowerSchool, Intellimedia, etc. ? |  |
| Have you identified what will be required to upload into PASI separate from Other Student Information? |  |
| Are counselling records consistently included in the Student Record? Are they well managed? |  |
| Can you easily identify required metadata content from a folder or checklist. Do you know how to manage metadata? |  |
| For existing digital content how are they identified by file name. What is the format of the files? Do you have prior experience for digital to digital transfer? |  |
| **Project Management** |  |
| Will you need to create a business case for the project or a Project Charter? Do you need assistance to prepare these documents? |  |
| How much internal capacity do you have to devote to the project?  |  |
| Do you have a Sponsor for your Project aligned with the business of Student Records? |  |
| Do you have existing experience with digitization(e.g. Human Resources project)? |  |
| Do you have Project Management resources? |  |
| Do you have in-house IT expertise to assist with this project? |  |
| Are you able to evaluate options for implementation meeting project requirements (in-house or outsourced, if in-house what is your existing approach for records and information management services? |  |
| Are you capable of auditing and adding a quality assurance program to an in-house program? Do you have at least two people? |  |
| Do you have a way to keep content accessible throughout the project? |  |
| Do you want a phased implementation or would you like the content all scanned and digitized at one time thus eliminating paper records more rapidly? |  |
| Do you have capability of taking on a long-term maintenance role through in-house resources? |  |
| Do you have a process in place and being followed for recording disposition of Student Records in a secure manner? |  |
| Are existing electronic records in a format that can be uploaded into PASI (e.g. PDF) |  |
| How and where should other record content be stored related to Other Student Information e.g. medical forms, counselling files, field trip forms, Technology consents. etc.? |  |
| Does your Division have centralized storage of files?  |  |
| Does your Division have centralized storage of some of the files (e.g. graduating students)? |  |
| Does your Division have project management expertise? |  |
| Do you have clear procedures for digitization as required by industry standards? |  |
| Are you able to create a quality control process for ensuring audit requirements are met for in-house scanned records? |  |
| Do you have a file name convention or a way to clearly identify electronic files meeting project requirements? |  |
| Does your Division have an existing secure digital repository and experience migrating digital content? |  |
| Are roles established with resources assigned to meet the project’s goals?  |  |
| Does the entire endeavor seem overwhelming? |  |
| Do you have capacity to support training and change management? |  |
| Do you need to bring in some outside help to plan, organize and help staff get underway? |  |