

STUDENT CUMULATIVE FILE COLLECTION PROCEDURES

ALL CUMULATIVE FILE FOLDERS SHOULD BE BOXED AND READY FOR PICKUP



The following items can be requested from the Technology Operations Department:

Item	Delivery Method
Master EXCEL spreadsheet(s) list sorted by student alpha	Email
Banker Boxes for placement of cumulative folders	Pony

Please proceed with the following instructions:

STEP 1: MASTER CUMULATIVE FILE COLLECTION LIST – EXCEL SPREADSHEET

1. Print the master cumulative file collection sheet – excel spreadsheet.
2. Pull the cumulative file folder for each student listed on the spreadsheet.
3. Place cumulative folders in the banker boxes provided, leaving sufficient room for review.
4. Fill in the proper fields on the electronic copy of the master cumulative file collection sheet – excel spreadsheet as student cumulative folders are placed in boxes.
5. Send the completed master cumulative file collection sheet – excel spreadsheet via email to records@collierschools.com

**File collection sheets should be sent electronically as an EXCEL attachment.
Scanned/PDF attachments will not be accepted.**

STEP 2: PREPPING STUDENT CUMULATIVE RECORDS FOR IMAGING

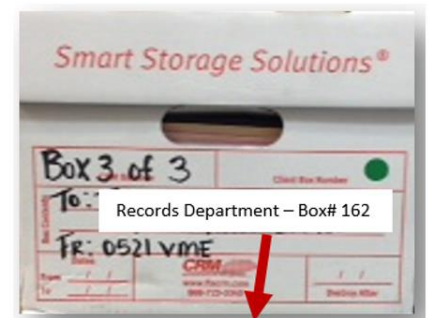
1. Pull student cumulative records according to master records collection sheet – excel spreadsheet.
2. Remove all staples, binder clips, paper clips, etc. from content items.
3. Make sure documents are filed in the correct categories (ex. Birth certificate in Category A. Refer to the [File Management Reference Guide](#)).
4. Remove any non-record items that should not be in the cumulative record.

MASTER CUMULATIVE FILE COLLECTION SHEET
 FROM LOCATION: _____ TO LOCATION: _____ TOTAL # OF BOXES: _____
 PERSON PULLING CUMES: _____ PERSON BOXING CUMES: _____ PERSON PICKING UP CUMES: _____

BOX#	STDT ID	LAST	FIRST	MIDDLE	DOB	GRADE	SCHL ID	SCHL	AS/OOZ	ELL	ESE
											K
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STEP 3: BOXING PROCEDURE

1. Use permanent marker to indicate Box ___ of ___ on the front of box AND the School # - initials (for example, 0201-AVE) on the outside of the box in the client # field.
2. Place a copy of the completed master cumulative file collection sheet inside “BOX 1” visible and on top of the cumulative files.



**ADDRESS TO:
RECORDS DEPARTMENT
BOX# 162**

STEP 4: PICK-UP PROCEDURE

1. Boxes of prepped cumes should be sent via PONY. DO NOT wait until you have all cumes ready, send once each box is filled.
2. You will be notified when records have been imaged by Operations.

QUESTIONS/COMMENTS:

Records Department
 Phone: 239-377-0507
 Email: records@collierschools.com