# Procedural Document for Joint Consent to Release Information (FERPA) Form

### About this Document

This form aims to provide a central landing spot for students to declare their consent to provide student educational record data to third parties (e.g. parents, partners, employers). This form should be obtained in a non-coercive environment without interested third parties present.

### Accepting the Document

Students wishing to have a Consent to Release Information form on file should fill out all parts of the form except the bottom portion for revocation. If a student has not specified a purpose for the release, ask them to specify for what purpose. Inform the student that filling out the form does not mean a release at any time to specified individuals; if it is information they can easily offer their specified individuals, they should offer that information themselves. Further, let them know that this is information that will be shared over the phone; we will not be emailing or faxing educational information.

Ensure that the student has identified a secret code for each person listed on the form.

**Please note: Students may turn in the form two ways. They may submit it in person and show their student ID OR if the form is completely filled out, signed, and scanned, they may submit it through their OSU-issued email address. Students may not submit via fax or U.S. mail because their identity cannot be verified.**

\*\*Note: We previously operated by only acknowledging the most recent form on file. *This is not in FERPA compliance.* When a student submits a new form, please ask them if they wish to revoke any of the prior permissions they previously allowed. Unless a student revokes a release, the release remains active. This, undoubtedly, may cause some more digging work, but until we have a better solution, this is how we must proceed.\*\*

### Processing the Document

At the bottom of the document, add the date and name of the staff member who accepted the form. Scan in the form into the student’s NOLIJ file.

NOLIJ Indexes: Each unit involved in the Multi-Unit Consent form will have their own indexable doc type in NOLIJ, beginning with “FERPA Form” and ending with the unit’s NOLIJ handle. They are as follows:

• FERPA Form-REGS (Office of the Registrar)

• FERPA Form-FA (Office of Financial Aid and Scholarships)

• FERPA Form-CHA (Advising)

• FERPA Form-SF (Office of Business Affairs- Student Finance)

Only the unit the doc type belongs to can index as that doc type/handle, but each unit’s NOLIJ administrator will grant users the capability to view all the FERPA Form doc types. For example, a staff member in the Office of the Registrar can scan a form, index it as “FERPA Form-REGS” and is able to see other forms (“FERPA Form-FA” for example) that might have been submitted by other units. The Registrar staff member does not have the option to label the form “FERPA Form-FA,” since that doc type is for Financial Aid staff use.

This makes it seem like there is specific “ownership” over the form itself, but this isn’t the case—the purpose of this form is to be shared. NOLIJ does not have the capability to make a doc type indexable for all units.

### About Releasing Data

When offices receive phone calls from external parties about students who have consented to release information, ensure that the party tells you both the student’s name and the secret code. If they do not know the secret code, direct them to check back with the student.

Offices should only release data that has been explicitly stated ***and*** that your particular office oversees. For example, if a third party calls an academic advising office for a student’s class schedule, they should be re-directed to the Office of the Registrar. However, if the third party asks for information about advising appointments, the advising office may release that information over the phone if the student has consented to release that information.

### Suggestions for Handling Parents Asking for Abundance of Information

FERPA outlines that school officials ***MAY*** release information with a student’s written consent. The rule of **may** not **must** is important to consider, particularly if offices are receiving abundant requests from one particular party on behalf of one student.

If someone is requesting official information (e.g. transcript, verification of enrollment), the student will need to fill out an official request for each release, as this form does not cover releases of official documents. This is meant to provide informal information that is relevant to a particular purpose, such as to serve as a waiver for someone to join on an advising appointment or to be able to learn a balance on a bill that needs to be paid.

### 