How Edgewood Independent School District
Migrated 200 Paper Forms into Laserfiche Forms

NUMBER OF EMPLOYEES:
1,001 – 5,000

HEADQUARTERS:
San Antonio, TX

INDUSTRY:
Education – School Districts

BENEFITS:

▶ Copier ink purchases decreased by $250,000 per year.

▶ Copier service contract renogotiated to save $30,000 per month.

▶ Easy for people to submit forms from mobile devices.

▶ Approval process is tranparent for people who submit forms.

▶ Reviewers receive automatic notifications of pending tasks.

▶ Information is stored in a central and secure electronic repository.

Adam Galvan, Technology Director, describes Edgewood Independent School District's widespread use of Laserfiche Forms.

At Edgewood Independent School District (EISD), teachers, staff and administrators were used to filling out a paper form for anything from requesting time off to requesting funds for a classroom pizza party. Here is how EISD eliminated more than 200 different types of paper forms and made approval processes more efficient with Laserfiche Forms.

LASERFICHE FORMS HAS MORE THAN 200 USES AT EISD

Laserfiche Forms is used throughout the entire district. Here are just a few ways that EISD uses Laserfiche Forms:

- Administrators use Laserfiche Forms to request new construction projects.

- Safety and security officers use Laserfiche Forms for alarm code authorization requests.

- The EISD police department uses Laserfiche Forms to report truant students.

- Athletic event personnel fill out their timesheets in Laserfiche Forms on-site during sports events and submit them via their iPads.

- Teachers use Laserfiche Forms to request funding for pizza parties.

- New employees use Laserfiche Forms to enroll for benefits.

- Employees submit their resignation or retirement requests with Laserfiche Forms.

- The human resources department uses Laserfiche Forms to request new positions.

- Staff uses Laserfiche Forms to submit and approve travel settlements.

Laserfiche®

LASERFICHE FORMS AS PART OF A BUSINESS PROCESS

A number of forms used at EISD need to go through an approval process. Principals, directors, academic officers and business/operations officers are all involved in these approvals and have administrative rights to access tasks assigned to them.

Some of the review/approval processes require signatures of approval. For each section that requires a signature, EISD has incorporated a line item where the submitter must enter the last four digits of his or her social security number as a replacement of the physical signature.

Once a form has been submitted, Laserfiche Workflow applies a digital signature corresponding to the name of the approver. We added signature certificates for each principal, director, academic officer and operations officer.
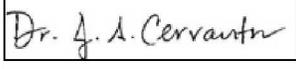
EXAMPLE: HUMAN RESOURCES

Every form used by the human resources department is part of a larger business process.

Here is an example of the HR-Processing Packet form that initiates the new employee onboarding process.
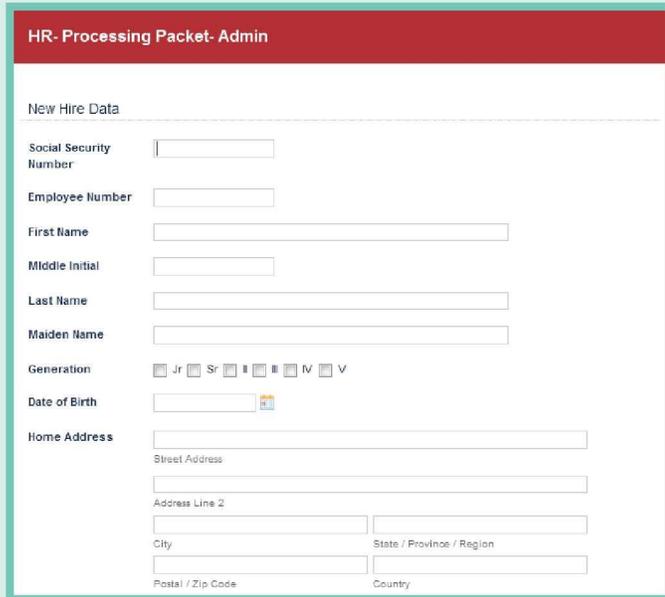
HR- Processing Packet- Admin

New Hire Data

Social Security Number	
Employee Number	
First Name	
Middle Initial	
Last Name	
Maiden Name	
Generation	☐ Jr ☐ Sr ☐ I ☐ II ☐ III ☐ IV ☐ V
Date of Birth	
Home Address	
	Street Address
	Address Line 2
	City / State / Province / Region
	Postal / Zip Code / Country

Once the employee has submitted the form, it is automatically sent to an HR specialist for review and approval. The HR specialist makes any necessary changes before approving and submitting the form. This action triggers Laserfiche Workflow.

Laserfiche Workflow populates the standard EISD HR processing PDF form with the data extracted from Laserfiche Forms and stores it in a new folder in Laserfiche.

Here is what this workflow looks like:
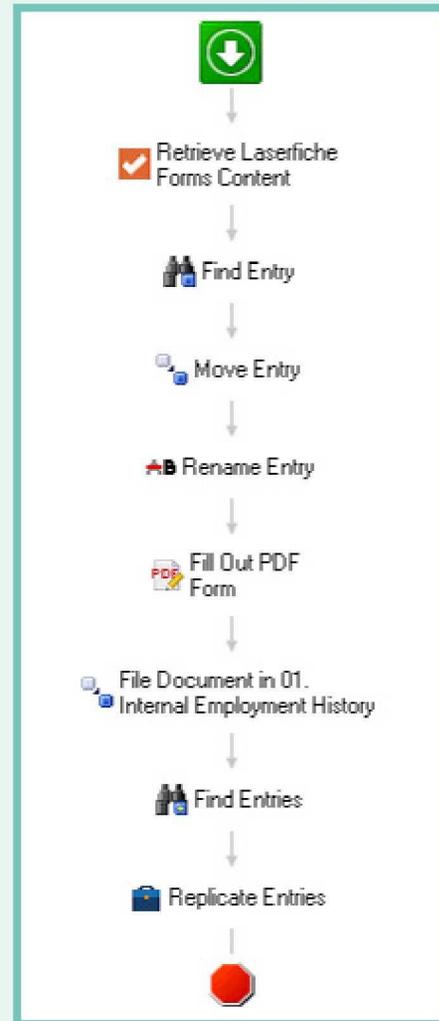
Not all paperwork that a new employee must fill out can be electronic. One example of this is certain tax forms. The employee fills out and signs the tax forms by hand. An HR specialist then scans them directly into Laserfiche. He then selects the type of form from a field in the template that routes the tax forms to the employee's folder in Laserfiche.

ADVICE FOR GAINING BUY-IN

At Edgewood Independent School District, we implemented Laserfiche in baby steps and built enthusiasm for the solution by communicating the value and ease to all. We physically went to each department/unit to show them what Laserfiche Forms could do and how easy it was to fill out the forms from anywhere.

As we brought in new users, we were able to personally identify tangible benefits within their individual departments. We provided plenty of training (sometimes one-on-one training) and even developed a handbook of new processes/procedures to help employees understand the major benefits. Finally, we made a point of celebrating/recognizing success within departments.

ADVICE FOR USING LASERFICHE FORMS

Here are some suggestions to help with migrating paper forms to Laserfiche Forms:

▸ Consolidate several paper forms into one Laserfiche form by using the rules to make certain sections appear only if particular criteria are met.

▸ Simplify forms completion by using database lookups. Prompt the user to enter his ID and configure the system to populate other information such as name and job title directly from the database. This can reduce data entry errors and make filling out forms faster. For example, any form that is filled out by an EISD employee populates the employee's name and other identifying information based on the employee number entered.