

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 renegotiated to save \$30,000 per month.
- ▶ Easy for people to submit forms from mobile devices.
- ▶ Approval process is transparent 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 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.

Fingerprinting Acknowledgement

By signing below, I hereby acknowledge that I understand that, as a non-certified employee hired on or after January 1, 2008, I must submit my fingerprints and identification information to the Texas Education Agency (TEA) and the Department of Public Safety (DPS) before beginning employment. I also acknowledge that I understand that, at the discretion of the District, I may be allowed to begin work before the fingerprint process is complete. I further acknowledge that I understand that my continued employment is contingent on the results of my criminal history report. I understand that if the TEA finds that I am ineligible for employment under the provisions of the Texas Education Code (TEC) § 22.085, I must be discharged by the District. In addition, I understand that a criminal history information clearinghouse will be created that will provide updates of any subsequent criminal record. I understand that based on information in the clearinghouse record, TEA will certify to the District whether I am eligible for continued employment. If I should be found to be ineligible for employment based on a subsequent criminal record, I understand that the District must discharge me immediately from my employment. In addition to the foregoing information, I understand that, before being offered employment by the District, I must be cleared by a name-based criminal background check based on the District's own employment requirements. I also understand that the District may discharge me from employment if I fail to disclose in my employment application a conviction of any felony, or misdemeanor involving moral turpitude. TEC § 22.085 (d)

Last 4 of Social Security

Date 

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.

Fields Tags Links Versions Signatures: 3

Sign... Validate Remove...



Signed By: MHS.Admin
Signed Date/Time: 11/1/2013 8:41:45 AM
Reason:



Signed By: ChiefAcademic.Admin
Signed Date/Time: 11/1/2013 8:41:45 AM
Reason:



Signed By: Supe.Admin
Signed Date/Time: 11/1/2013 8:41:45 AM
Reason:

EXAMPLE: HUMAN RESOURCES

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

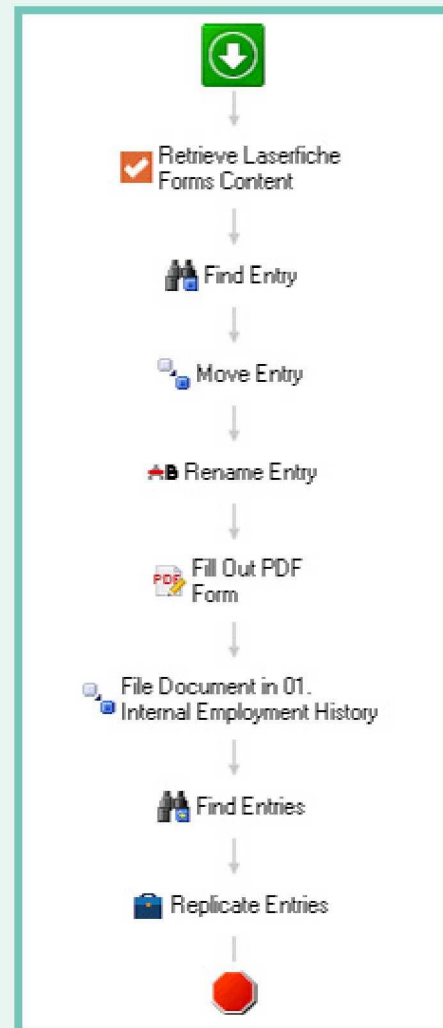
Here is an example of the HR-Processing Packet form that initiates the new employee onboarding process.

The screenshot shows a web form titled "HR- Processing Packet- Admin". It contains several input fields for "New Hire Data": Social Security Number, Employee Number, First Name, Middle Initial, Last Name, Maiden Name, Generation (with dropdowns for Jr, Sr, and Roman numerals I through V), Date of Birth (with a calendar icon), and Home Address (with sub-fields for Street Address, Address Line 2, City, State / Province / Region, Postal / Zip Code, and 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.

The screenshot shows the 'Rules' configuration interface in Laserfiche. It displays two rules, labeled 1 and 2, each with a yellow background. Rule 1 is configured with 'Available Sources' set to 'localhost LFDyna...', 'Table / View' set to 'JobCodes', and 'Name' set to 'JobCodes'. The rule logic is: 'When First Letter of Job matches with data source column First Letter', and 'Fill Job Code Name with data source value Job Code'. Rule 2 is configured with 'Available Sources' set to 'localhost LFDyna...', 'Table / View' set to 'CAMPUS/DEPT', and 'Name' set to 'CAMPUS/DEPT'. The rule logic is: 'When New CAMPUS/DEPT matches with data source column TYPE', and 'Fill CAMPUS/DEPT NAME with data source value NAME'. There is also a third rule partially visible at the bottom: 'When Present CAMPUS/DEPT matches with data source column TYPE'.

The screenshot shows the 'System Security' interface in Laserfiche. It has a top bar with '+New Data Source', 'Update', 'Test', and a trash icon. Below this is a table with columns 'Data Sources', 'Data Sources', 'Hide Details', and 'Processes'. The 'Data Sources' column shows 'Server: localhost', 'Database: LFDynamicFields', and 'Account: eisd@laserfiche'. The 'Data Sources' column also shows 'My User Settings'. The 'Data Sources' column also shows 'Tables and Columns' with expandable sections for 'CAMPUS/DEPT', 'Forms-DeptCampus', 'JobCodes', 'Vendors', and 'Stored Procedures'. The 'Processes' column shows a search bar 'Enter process name' and a list of processes with checkboxes: 'AP- Consultant Evaluation Report', 'AP- Mileage Reimbursement', 'AP- Travel Settlement', 'ATH- Officials' / Support Personnel's Payment V...', 'FS- Field Trip Lunch Request', 'FS- Pizza Party Reservation', 'HR- Admin Pkt', 'HR- Final Applicant Rating (old)', and 'HR- Interview Questions'.

Your Next Step



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info@laserfiche.com