

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

Laserfiche Solution Contributed By: Adam Galvan, Technology Director, Edgewood Independent School District

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 different 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 for requesting new positions
- Staff uses Laserfiche Forms to submit and approve travel settlements

Here is an example of a form that is used to request new positions:



HR- PR Form

Part A (Check Applicable Boxes and Provide Information Requested)

Campus/Dept

Campus/Dept Name

Funding Source Yes No

Job Category Teacher Professional/Administrative ParaProfessional Auxiliary Temporary
 Part-Time Full-Time Substitute Existing

New Position Yes No

Beginning Date

Ending Date

Pay Grade AM AP PG AUX IS PD IT PA
(If Applicable)

Part B (Check applicable categories and provide information requested)

Categories Replacement Delete Position New

Specify Student Ratio

Teaching Unit Only
*Total Number of Students currently enrolled

Complete Budget Information for Position Requested

Budget Information REG. ST COMP. SP ED. BIL. VOC. TITLE 1
 Other

Budget Number

Include all budget account numbers and percent of funding %

Add

Save unfinished form to complete later

Submit

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 their 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.

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

Metadata

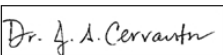
Fields	Tags	Links	Versions	Signatures: 3
Sign...				
Validate				
Remove...				



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.

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

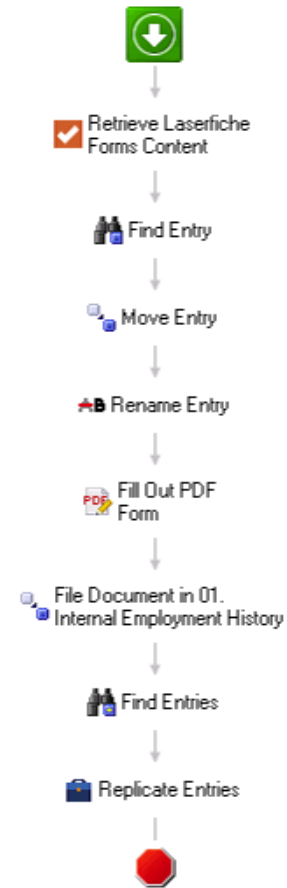
Postal / Zip Code Country

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 extraction from Laserfiche Forms and stores it in a new folder in Laserfiche.

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 form by hand. An HR specialist then scans them directly into Laserfiche. They then select the type of form from a field in the template that routes the tax forms to the employee's folder in Laserfiche.

Here is what the new workflow looks like:



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.

The screenshot shows the 'Available Sources' section of the Laserfiche Workflow Designer. It displays two rule configurations for conditional form sections.

Rule 1:

- Available Sources: localhost LFDyna
- Table / View: JobCodes
- When: First Letter of Job matches with data source column First Letter
- Fill: Job Code Name with data source value Job Code

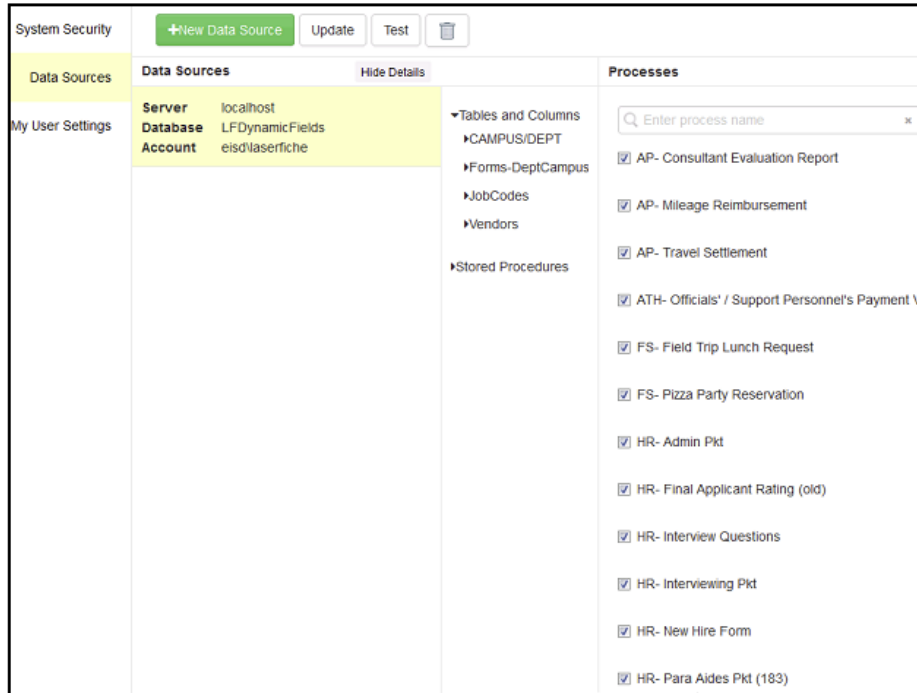
Rule 2:

- Available Sources: localhost LFDyna
- Table / View: CAMPUS/DEPT
- When: New CAMPUS/DEPT matches with data source column TYPE
- Fill: CAMPUS/DEPT NAME with data source value NAME

Below Rule 2, there is another rule configuration:

- When: Present CAMPUS matches with data source column TYPE
- Fill: CAMPUS/DEPT NAME with data source value NAME

- Simplify forms completion by using database lookups. Prompt the user to enter their 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.



Benefits of Laserfiche Forms

Migrating all of the district's paper forms to Laserfiche Forms and Laserfiche Workflow has resulted in the following benefits for EISD:

- Form submitters can see where in the review/approval process their form is at all times
- Reviewers and approvers are notified by email of pending tasks so that they are able to act on them immediately
- Everything is stored in one central location and can be accessed by anyone with the appropriate permissions
- Users can easily fill out and submit forms from a mobile device when they are out of the office or classroom


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