Reducing the Cost and Effort of Paperwork at Fresno Unified School District

As one of California's largest and oldest school districts, Fresno Unified School District (FUSD) faced a massive amount of paper records. The district has records going back to 1887, and with nearly 76,000 active students, the number of records grows rapidly each year.

Working with paper-based records threatened to swamp the district's staff, which deals with continuous requests for student records related to transfers, matriculation, incarceration and probation, military service, and general inquiries. The district turned to Appleby and Co. for a solution to their paper document troubles.

Moving from Paper to Digital with Document Management
Appleby and Company started working the Fresno Unified School District in the late 1990s to address their document challenge. As an experienced provider of information management solutions, Appleby applied a wealth of expertise to creating a solution that the district's legal compliance needs as well as their business process requirements.

The Appleby team assessed document management needs across all parts of the school district, including Student Services/Records, Adult Education, Special Education, Human Resources, Contracts, Research and Assessment, and Contract Management. It designed and implemented a document management solution to meet the following needs:

Fresno Unified School District
- *76,000 active students*
- *Approximately 7,300 permanent employees and 2,000 substitutes*

Challenges
- *Large volumes of paper-based student records and employee forms*
- *Multiple federal and state regulations governing record retention, privacy and sharing*
- *Limited staff time and budget resources*

- Reducing the paper burden with efficient scanning of paper records to a digital format
- Automating data input and indexing of information through optical character reading (OCR) technology and automated data capture
- Accelerating record retrieval through indexed searching
- Providing resilience and continuity with microfilm backups of digital records, for access even when computer systems are down
- Adhering to relevant compliance requirements for each group, including the Freedom of Information Act, Family Educational Rights and Privacy Act (FERPA), No Child Left Behind (NCLB), HIPAA Privacy Rule, and state educational regulations

Appleby designed a solution using the Laserfiche content management solution with dedicated scanning equipment in record-heavy departments. They configured the solution for each department, trained staff, and continued to engage with the school district to tune the solution to meet evolving needs.

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Today, several departments in the school district use the document management solution. The heaviest users are the Student Services and Human Resources teams.

Reducing Cost and Time of Managing Student Records

The Student Services/Records department is responsible for maintaining the student records, including

- Student cumulative files (spanning K-12)
- Transfer files
- Psychological files
- Individualized Education Program (IEP) plans

Today, FUSD uses the Laserfiche solution to scan paper records – automatically recognizing and indexing key values in the records to make retrieval quick and easy. For example, a scanned copy of a transfer student record can be indexed by the student's name and linked with to the correct student's in-district records, so someone searching for that student finds all relevant records.

Before implementing the Laserfiche solution, the student records department pulled an average of 250 records from microfilm (about one hour per record) and 1750 from paper files (10 minutes per record). Now the staff can retrieve the files online in seconds. The Laserfiche solution saves approximately 541 labor hours every month. Assuming an annual salary burden of $40,000, the cost savings in time reach $105,365 per year. The Laserfiche solution delivered instant savings in man-hours.

Rapid and accurate retrieval is important for the people who have to handle the many different requests for records from other institutions, as well as students and family members. Using Laserfiche, the district can answer all requests much more quickly than they could with paper. According to Cindy Whitney, supervisor at Student Records office, "Working with Laserfiche saves us a tremendous amount of time. You don't always have the correct spelling of a name or the right year for a student. And we might have 85 kids with the same name in our district – this system makes it easy for us to find the right one quickly."

The document management system also helps the district meet multiple regulations for student record privacy, access and retention. For example, it automatically limits access to student records to authorized individuals and audits all record access. Automated retention ensures that records are available, and can be made available quickly to people who need them.

Streamlining HR Processes with Digital Employee Records

FUSD is also a major employer in Fresno, with more than 7000 permanent employees and 2000 substitutes. The Human Resources team manages all of the employment paperwork, including offer letters, tax forms, evaluations, vacation requests and direct deposit forms.

Every summer sees a veritable flood of paperwork as the district lines up staffing for the coming year. People in HR take shifts scanning in the necessary paperwork. Appleby implemented a Quick Fields feature in the Laserfiche solution to address these high-volume scanning needs, reducing manual efforts with predefined metadata for the different types of forms.

Once the data has been scanned, individuals within HR and beyond use the Laserfiche system to quickly find the information needed to answer questions about vacation time, withholding, evaluations, etc. The document management solution enforces access protection and audits all access to private employee records. Security and privacy are important as employee records hold sensitive information, such as social security numbers, salaries and bank account information.

According to Nayla Remington, Information Systems Analyst at FUSD, "It's much easier and faster to work with online records than looking in folders for paperwork. We don't like paper lying around in HR – we want to scan it quickly so we can the secure the information and keep it private."

Future looking

Appleby and Co. has been an important partner for the district over many years. Whitney says, "The support from Appleby is awesome. I've never had a time when I couldn't reach somebody with a question or concern."

The district continues to work with Appleby to address its evolving needs, integrating document management with online systems so that the district can reduce its reliance on paper workflows and forms. For example, the Appleby team is working with the Human Resources team to help them reduce the role of paperwork in employee onboarding processes.

> *Support*
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>
> *- Supervisor, Cindy Whitney*

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