

Taking the Plunge to Electronic Student Records and Beyond



New Caney ISD

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New Caney ISD

- ✓ **Houston Area School District**
- ✓ **Enrollment: 19,624**
- ✓ **Staff: 2,570**

New Caney ISD Educational Facilities Include:

(4) High Schools
(4) Middle Schools
(12) Elementary Schools
And Other Specialized Schools & Centers

Growth

New Caney ISD is growing at a rate of 7% per year!

Before the Project

- ✓ **Cumulative Folder Organization**
 - ✓ *Standardized district wide.*
 - ✓ *Registrars had twelve months to organize active folders.*
- ✓ **Software Purchase**
 - ✓ *Started implementation, learning and functionality of the software in June 2014.*
 - ✓ *Major shift in business practices from paper to electronic student records.*
 - ✓ *Human Resources support and campus administration.*
- ✓ **Months leading up to the project**
 - ✓ *Performed cumulative folder audits to make sure folder organization was taking place.*
 - ✓ *Informed campus and district leadership the conversion was happening the summer of 2016.*

CUMULATIVE FOLDERS

Student records should be stored in locked filing cabinets or in locked rooms with limited, controlled access.

Organization of the CUMULATIVE Folder:

Left Side:

- Home Language Survey *Keep original/ earliest date*
- Birth Certificate/BC Declaration, Visa/ Passport, PID
- Social Security Card (Student)
- Parent ID/Military ID form
- Unaccompanied Youth
- Military Connected
- Foster Care Form

Right Side:

- Enrollment Forms (ALL)
- TEA Race/Ethnicity Form
- Food Allergy Form
- Proof of Residency Form/Falsification
- Pre K Verification Form
- AA, GPE, POA
- Previous School District documentation
- Final Report Card, Test Scores and Final Transcript will be placed on top at the end of the yr. **PERMANENT 9-12 grade**
- Withdrawn paperwork

Binders: ** If the student w/draws please pull information and add to the inactive cum folder

- Compulsory Attendance Notification Form
- Student Residency Questionnaire Form
- Migrant Form
- Public Information Request Form
- Code of Conduct Form
- AUP (Electronic Communication Form)

All other forms are kept by withdrawal date plus 5 years

Medical Files - The Nurses will send directly to the receiving Nurse and CUM folders will be sent to receiving Registrar with a form for signatures. This is for ALL campuses. Also, the medical records should be merged with the CUM folder when the student becomes inactive

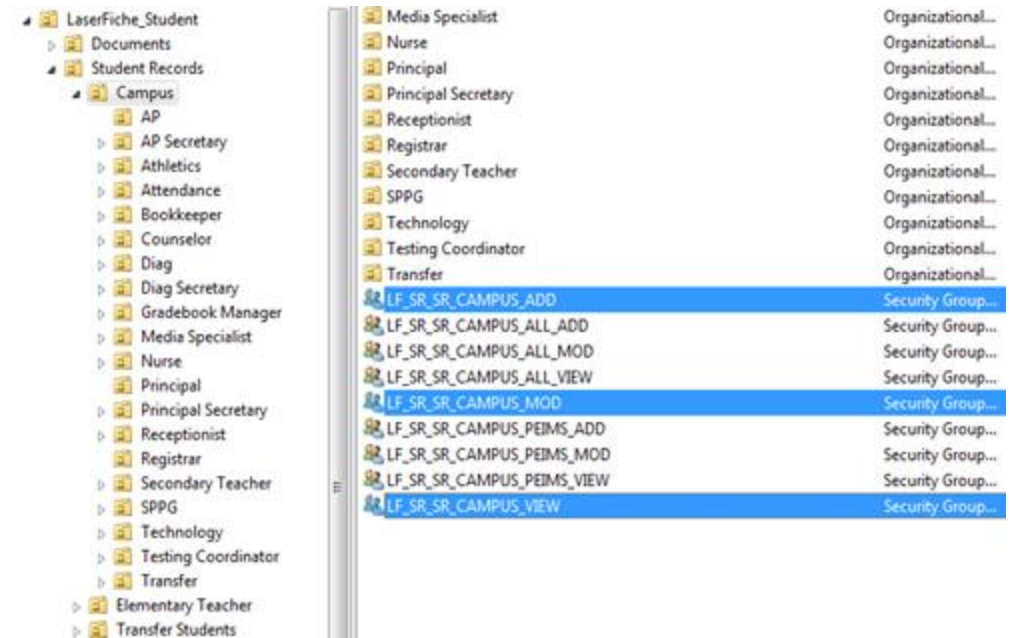
Inactive folders remain on last campus of attendance (Withdraw date + 5 years). Once the folder has reached the withdraw date plus 5 years. We only need to keep test scores, final transcript everything else can be shredded. Contact the Records Manager if you have questions.

Additional Colored folders for Students:

At Risk – Blue	Dyslexia – Pink	504 - Red
Gifted and Talented – Green	ELL/ LEP – Yellow	
Test Writing Samples – Teal (Elem-destroy,)		
Secondary – (out of the cum folder but on campus will not move campus to campus)		
English Speakers in Dual – Blue 2 section folders		
Legal Documentation- (Custody, Divorce, Protective Orders, etc.) – Yellow		
RTI – Manila		

Before the Project

- ✓ **Months leading up to the Project (cont.)**
 - ✓ *Determined what information truly needed to be in the Special Program folders (504, GT, LEP, At Risk, etc.)*
 - ✓ *Met with all departments and Special Programs to answer questions or provide assurance.*
 - ✓ *All Departments involved in the planning process: Student Services, Nurse Coordinator, PEIMS, Information Management Systems, Technology and Records.*
- ✓ **Quick Fields**
 - ✓ *Areas we could actually use quick fields.*
- ✓ **Security Groups**
 - ✓ *Security changed multiple times*
 - ✓ *Security was set by Document Type and Campus Role*
 - ✓ *ADD, MOD, VIEW groups*



Laserfiche Quick Fields

Recent Sessions

Session	Last Modified	Location
Student Transcripts	11/01/2016 2:32:49 PM	Computer
Testing	09/13/2016 8:48:02 AM	Computer
Report Cards Skyward	09/06/2016 1:20:31 PM	Computer

Before the Project

✓ **Boxing of the Cumulative Folders**

- ✓ *List of student folders in each box by grade level.*
- ✓ *Boxes labeled correctly.*

✓ **Transfer of Folders**

- ✓ *Maintenance department gathered over 700 boxes from all campuses.*
- ✓ *Folders were stored at the location of the scanning project by grade level.*

✓ **Hiring of Employees**

- ✓ *Emailed entire district for a letter of interest pertaining to the project.*
- ✓ *Screened and interviewed for 30 positions.*
- ✓ *We hired 30 active, but off contract employees or at will employees, to work the summer project.*

Summer Scanning Project

*30 employees starting June 13 - August 12th
(8 weeks)*

40 hours a week/10 hour days (Monday - Thursday)

\$12.00 an hour

7:00 am - 5:30 pm

We did work until 8pm for about 5 weeks

Last week we worked until 11pm

Off contract or at will employees opened to District

Wide regardless of position.

EduHero - FERPA training for all employees

First Day Training - Summer 2016

✓ Morning

- ✓ Went over the entire process with all the employees and handed out helpful information including cheat sheets and manuals.
- ✓ FERPA Training and NCISD Nursing Coordinator spoke to the employees.

✓ Afternoon

- ✓ Everyone prepped one box to have a box to start scanning.
- ✓ Scanning began.

✓ Cheat Sheets

- ✓ Created to make it easier and faster for the project employees to name the documents.
- ✓ One was created for each special program.

Document Name (Paper)	Template	Doc Type	Doc Description	Notes
Health Inventory	HEALTH-Student Records	Medical	Health Inventory	
Immunizations	HEALTH-Student Records	Medical	Immunizations	Shot Record - Proof of vaccination from dr's offices, ImmTrac, school records, etc....
Medication Administration/Procedure Records	HEALTH-Student Records	Medical	Medication Administration/Procedure Records	Medication Authorization Form, Documentation/calendar of medication given/procedures performed (suctioning, changing, tube feed) - MAR (Med. Admin. Record)
Affidavit of Conscientious Exemption	HEALTH-Student Records	Exemptions	Affidavit of Conscientious Exemption	Exemption from immunization - state document as requested by parent/guardian(s)

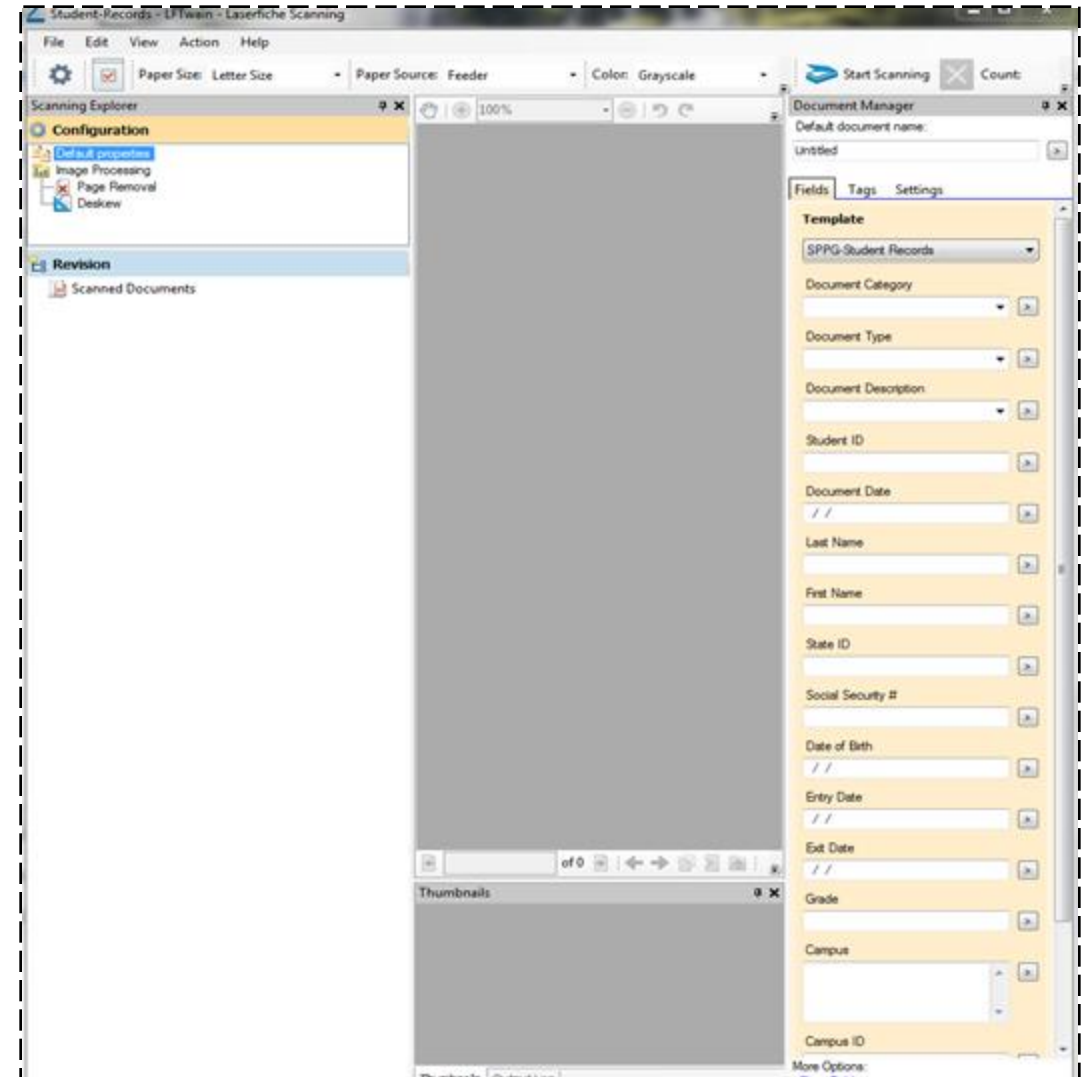
Document Name (Paper)	Template	Doc Type	Doc Description
Documentation of attempts to obtain HLS or LPAC records	Lep	Permanent	Docu of attempts to obtain
Limited English Proficient Student Documentation Checklist	Lep	Permanent	Limited Eng Prof Student
School History	Lep	Permanent	School History
Historia Escolar	Lep	Permanent	School History
Initial Review	Lep	Permanent	Initial Review
LPAC Student identification initial placement	Lep	Permanent	Initial Review
LPAC Meeting Minutes	Lep	Permanent	LPAC Meeting Minutes
Parental Notification-Identification and Placement for Sheltered English	Lep	Permanent	Parental Notif-Ident Placem
Consentimiento Para la Participación en el Programa de Inglés como Segundo Idioma	Lep	Permanent	Parental Notification- Ident
Notificación a Padres-Identificación y colocación	Lep	Permanent	Parental Notification-Ident

Scanning Project Phase

- ✓ **Phase 1: Preparing the Cumulative Folder**
 - ✓ *Removing all staples, paper clips, binder clips...etc*
 - ✓ *Organizing the folder the way it will be scanned.*
 - ✓ *Removing any documents that were not being scanned.*

- ✓ **Phase 2: Scanning**
 - ✓ *Scanning the cumulative folder.*
 - ✓ *Making sure all documents in the folder were scanned.*
 - ✓ *Verifying all the documents were legible.*

- ✓ **Phase 3: Verifying**
 - ✓ *Verifying every document was scanned and legible.*
 - ✓ *Re-scanning in any document that was not legible.*
 - ✓ *Making any corrections in the naming of the documents.*
 - ✓ *Template ~ Verify ~ Yes or no ~ Workflow filed.*



Repository Structure

✓ Folder Structure

✓ *Student-Records*

>Documents

>Student Records

>Campus

>Active

>Campus Name

>Grade Level

>Last Name

>School Year

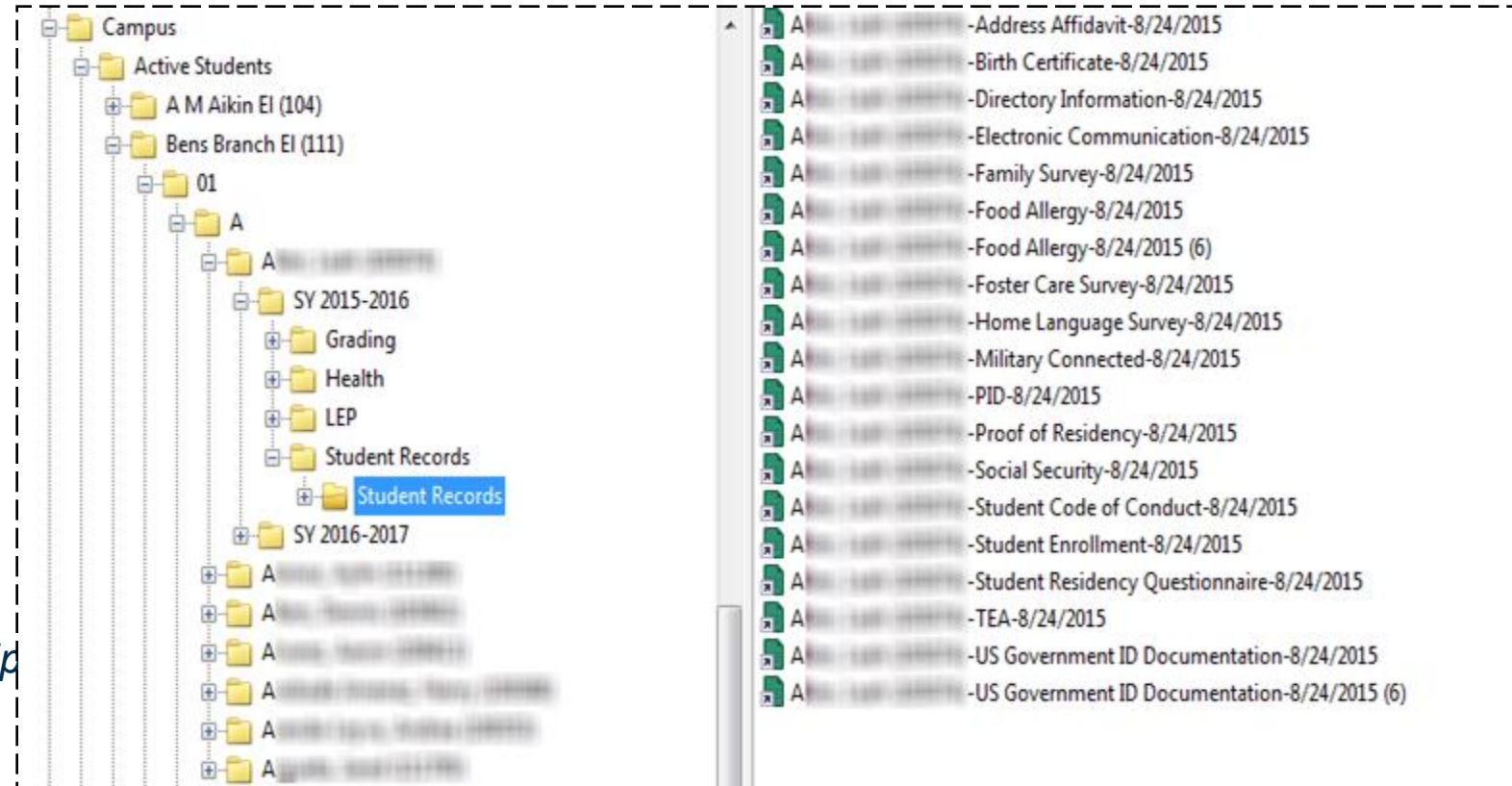
>Doc Category

>Doc Type

>Doc Description

>Inactive

>Transfer



✓ Document Category

✓ *Athletics, At Risk, GT, Health, LEP, SPED, Special Programs, Student Records, Technology*

✓ *Different templates and volumes for each*

Summer is over - What Now?

✓ **Where and How the project ended**

- ✓ *Pre K - 9th grade cumulative folders/Special Programs including (504, At Risk, GT, Dyslexia and RTI) were scanned and completed*
- ✓ *Pre K - 5th grade LEP folders were scanned*
- ✓ *6 - 12 grade LEP folders were sent back to the campus to be scanned by ELL Specialist*
- ✓ *10th - 11th grade will be scanned by Registrars*
- ✓ *12th grade will age out*

✓ **Where are the scanned Cumulative Folders**

- ✓ *They are being stored at the warehouse by grade level by campus.*
- ✓ *Just to be on the safe side and will be destroyed at the end of the school year*

✓ **Training for Teachers and Staff**

- ✓ *Trained every teacher/staff by campus on Weblink and logging in.*
- ✓ *Offered more training if needed*
- ✓ *Attended once a month meetings for all departments (Nurses, Principals, Counselors, Special Programs) to keep them updated on any issues or concerns they are having.*

Weblink

✓ Setup

- ✓ *Homepage shortcuts*
- ✓ *Simple searches*

✓ Security

- ✓ *All Campus Staff*
- ✓ *Same Security Groups as Client*
- ✓ *Security is on each document*

✓ Elementary Teachers

- ✓ *All students assigned to Homeroom in Skyward*
- ✓ *Updates students every 15 minutes*

✓ Issues

- ✓ *95% of tickets and calls were how to login using the domain*

Welcome to Laserfiche WebLink

The Internet gateway to our Laserfiche document center.

[Search Active Students](#)
[Search Inactive Students](#)
[Campus Folders](#)
[Elementary Teacher Home Room Folders](#)
[Search LEP Documents](#)
[Search Special Program Documents](#)

Last Name

First Name

Student ID

Staff Reaction

✓ Registrars

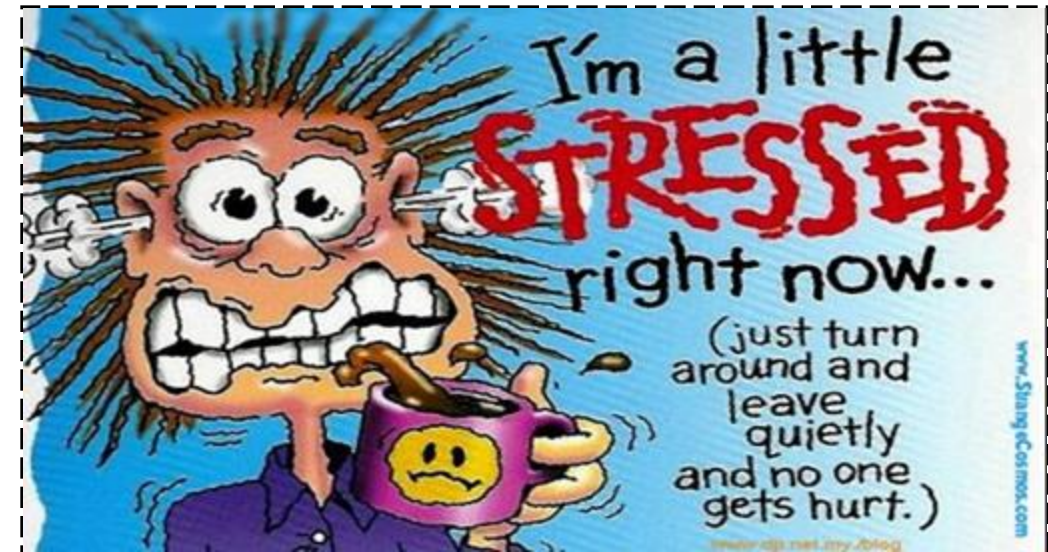
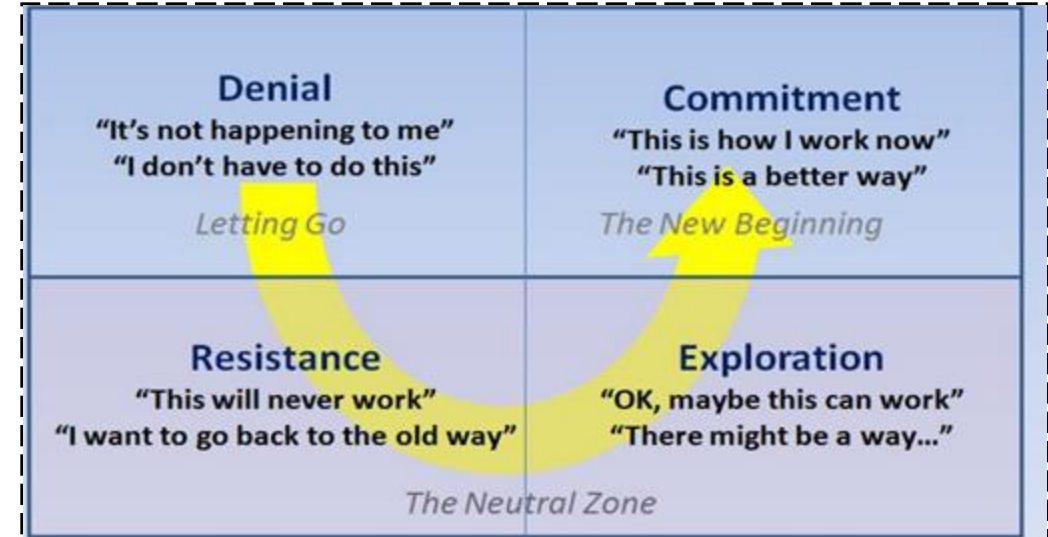
- ✓ Pros: Do not have to leave desk to access records, TREx extraction, and the organization is better.
- ✓ Cons: Figuring out where each document is, a lot of clicking, and having to label every document.
- ✓ Cons: If the documents are sitting in their work queue no one has access to see the documents

✓ Nurses

- ✓ Pros: Filing is a lot quicker, shot records are at fingertips, and documents are available at home.
- ✓ Cons: Labeling of the documents

✓ ELL Specialists

- ✓ Pros: Records are available within 15 minutes of students transferring to their campus
- ✓ Cons: Getting used to viewing the documents online



TREx

- ✓ **Process before cumulative folders went electronic**
 - ✓ *Pulled folders and copied every document needed for request.*
 - ✓ *Scan or email documents using Xerox machine.*
 - ✓ *Upload file to TREx.*

- ✓ **TREx Export**
 - ✓ *Complete Laserfiche form with student id and information will populate based on the id#*
 - ✓ *A PDF file will be created with the following information:
All testing, report cards, transcript, LEP, 504, RTI, GT, At Risk, immunizations, TEA, unaccompanied youth, BC, SS, home language survey, withdrawal form, and other school district info.*
 - ✓ *File saved on our Department (T:\\) folder > TREx > Laserfiche.*
 - ✓ *All files saved on drive are deleted every Saturday.*

TREx Export
www.newcaneyisd.org • 21580 Loop 494 • New Caney, Texas 77357 • Tel. 281-577-8600 • Fax 281-354-1878

Student Information

Student ID* First Name* Last Name* Campus*

Form

By entering the student ID above and submitting this form, I understand I am triggering a process that will export all TREX required documents for this student to a designated network location as a single PDF.

Acceptance & Digital Signature

By typing my legal full name and checking the acceptance box you:

- Accept the rules of this form.
- Agree that all information contained is accurate.
- Confirm that you are the person referenced through out the form and the acceptance section.
- I verify that the above information is true and correct.

Date Employee First & Last Name* Employee ID* Accept*

11/17/2016 ☐ Accept

Submit

New/Returning Students Process

- ✓ **Student online registration**
 - ✓ *SIS online registration forms are submitted*
 - ✓ *Registrar checks all registration forms to make sure they are completed.*
 - ✓ *Registrars move all forms to the client using Laserfiche Snapshot.*
- ✓ **Laserfiche**
 - ✓ *The forms are sent to 01 Student Registration to Process*
 - ✓ *Quick fields then will look at the student id, name, title to file into the student's electronic folder.*
 - ✓ *New Students - registrar will scan in all enrollment documents (social security, birth certificate, proof of residency, etc.)*
- ✓ **Inactives**
 - ✓ *Are kept on campus for 5 years by w/drawn school year.*
 - ✓ *Folders will be scanned when enrolled.*

The screenshot displays the Laserfiche software interface. The top menu bar includes File, Edit, View, Tasks, Annotations, Tools, Window, and Help. Below the menu is a toolbar with various icons for document management. The main window is divided into three panes: Thumbnails on the left, Image in the center, and Metadata on the right. The Thumbnails pane shows a list of documents, with the first one labeled '1'. The Image pane shows a scanned document with a barcode and a form. The Metadata pane contains a form for entering student information, including fields for Document Type, Document Description, Student ID, Document Date, Last Name, First Name, State ID, Social Security #, and Date of Birth. The form is titled 'Template: Stude' and has a 'Stud' button at the bottom right.

Medical and ELL

✓ Nurse

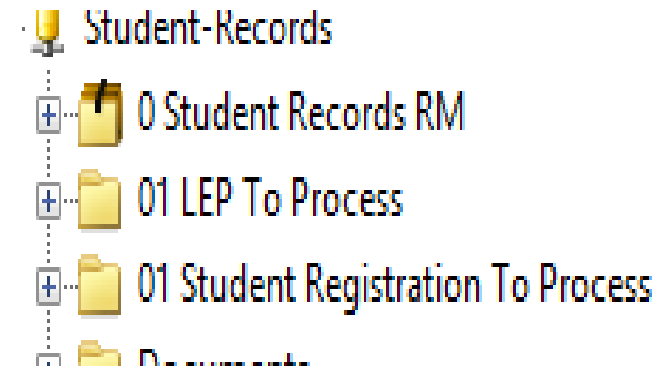
- ✓ *SIS online registration forms are submitted*
- ✓ *Nurse signs and approves Food Allergy forms to make sure they are completed.*
- ✓ *Nurse moves form to the client using Laserfiche Snapshot.*
- ✓ *The nurses will scan in immunizations, affidavits, etc.*

■ **Medical, Exemptions and Affidavits**

✓ ELL

- ✓ *ELL specialist mail merge all documents*
- ✓ *The forms are sent to 01 LEP to Process*
- ✓ *Quick fields then will look at the student id, name, title to file into the student's electronic folder.*
- ✓ *Going Live in January 2019 - ALL ELL forms (45) will be completed, submitted and filed in Laserfiche.*

■ **Other Districts, Yearly and Permanent**



SPPG

- ✓ **SPPG**
 - ✓ Enter Student's Id# and the information will populate
 - ✓ Template
 - ✓ Drop down selection on Category
 - **504**
 - **At Risk**
 - **Dyslexia**
 - **GT**
 - **MTSS**
 - ✓ Select Document Description
 - ✓ Add Document Date
 - ✓ Attach Documents and Submit
 - ✓ The documents will file in the students file



Scanning SPPG Files
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Student Information

Student ID*

First Name*

Last Name*

Campus*

Template

Template:*

Document Category*

Document Type*

Document Description*

Document Date*

Attach Document*

Submit

Only 1 document type may be uploaded at a time.

Date the document was created, not scanned.

Help is Available

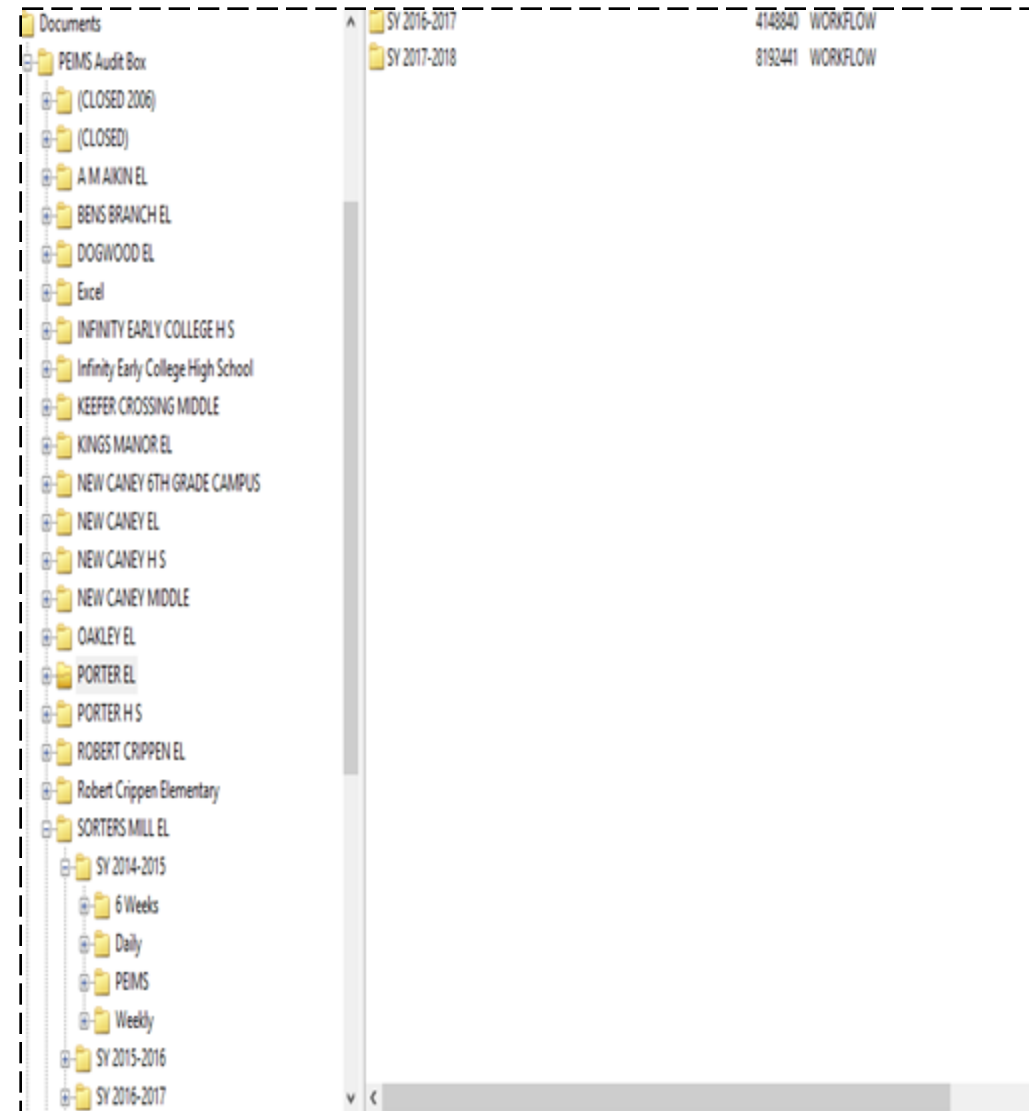
- ✓ **Open Labs**
 - ✓ *Every week from 4-6 p.m.*
 - ✓ *Help them split and file documents in their work queue*
 - ✓ *The PEIMS and Records department are available every week to help*
 - ✓ *Laptops are available to use during labs*

- ✓ **Help Desk Tickets**
 - ✓ *Users submit a ticket for support*
 - ✓ *Ticket is assigned to technicians based on area of request within the help desk*
 - ✓ *Within the ticket you can add notes, assign to other technicians, email ticket and close ticket.*
 - ✓ *Keep a count of all tickets assigned*



PEIMS Audit Box

- ✓ **Documents**
 - ✓ *Campus*
 - ✓ *School Year*
- ✓ **Attendance**
 - ✓ *Daily*
 - ✓ *Weekly*
 - ✓ *6 Weeks*
- ✓ **PEIMS**
 - ✓ *Attendance PEIMS documents*
 - *Membership Reconciliation*
 - ✓ *Registrar PEIMS documents*
 - *PEIMS change forms*
 - *Retained/Placed List*
 - *Entry/Withdraw log*
 - ✓ *Submission 1 and 3*
 - *Pre - PEIMS*
 - *Finalized*



Daily Attendance

- ✓ **Daily Attendance**
 - ✓ *Month*
 - ✓ *Dates*
 - ✓ *Documents*
 - *Attendance Notes*
 - *All Campus Sign in/out sheets*
 - *Day Summary report*
 - *Office visit report*
 - *Raptor Report*
 - *Recorded Class Attendance report*
 - *Unrecorded Class Attendance report*
 - *Suspension letters*

02 August
03 September
04 October
05 November
06 December
07 January
08 February
09 March
10 April
11 May
12 June

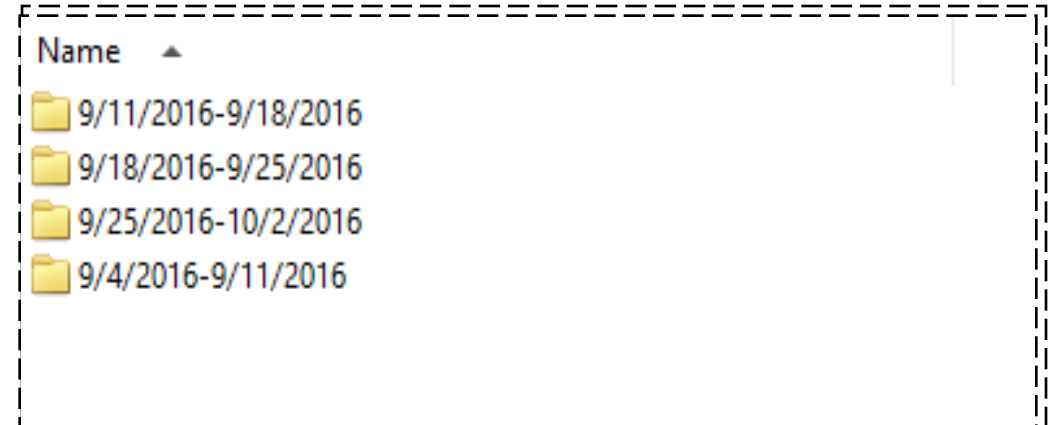
09/01/2016
09/02/2016
09/03/2016
09/04/2016
09/05/2016
09/06/2016
09/07/2016
09/08/2016
09/09/2016
09/12/2016
09/13/2016
09/14/2016
09/15/2016
09/16/2016
09/18/2016
09/19/2016
09/20/2016
09/21/2016
09/22/2016
09/23/2016
09/25/2016
09/26/2016
09/27/2016
09/28/2016
09/29/2016
09/30/2016

File	Size
Attendance Notes-9/14/2016 (62)	65
Attendance Notes-9/14/2016 (63)	69
Attendance Notes-9/14/2016 (64)	65
Attendance Notes-9/14/2016 (65)	69
Attendance Notes-9/14/2016 (66)	69
Attendance Notes-9/14/2016 (70)	72
Attendance Notes-9/14/2016 (71)	72
Attendance Notes-9/14/2016 (81)	75
Attendance Notes-9/14/2016 (82)	75
Attendance Notes-9/14/2016 (83)	75
Attendance Notes-9/14/2016 (84)	75
Attendance Notes-9/14/2016 (85)	75
Attendance Worksheets-9/14/2016 (20)	69
Day Summary Report-9/14/2016 (29)	69
Meal Request Form-9/14/2016 (3)	75
Nurse Log-9/14/2016 (15)	65
Office Visit Reports-9/14/2016 (25)	69
Raptor Report-9/14/2016 (18)	69
Recorded Class Attendance Report-9/14/2016 (17)	69
Unrecorded Class Attendance Report-9/14/2016 (17)	65

Attendance Audit Box

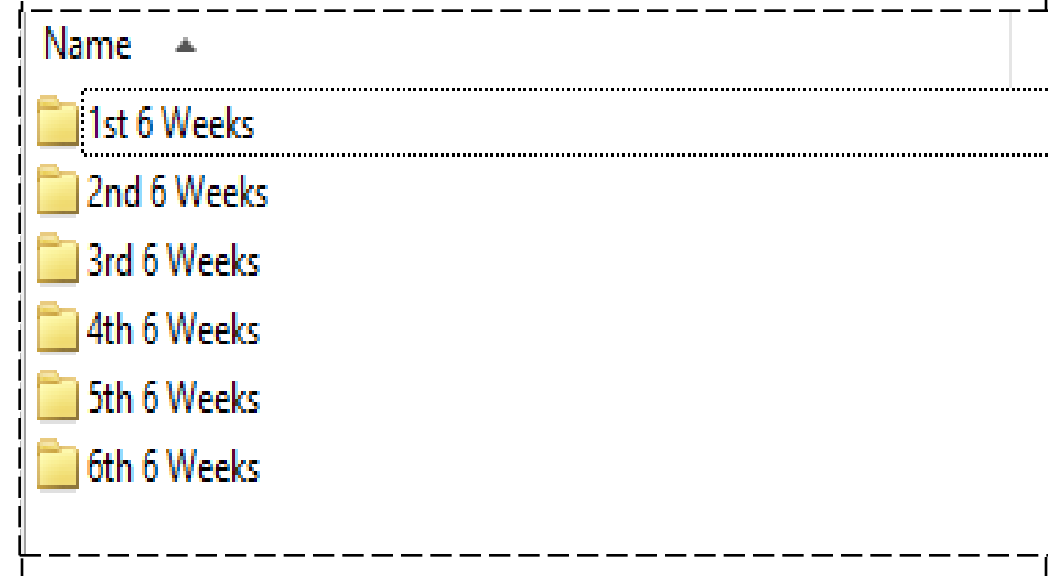
✓ Weekly Attendance

- ✓ Monthly
- ✓ Weekly by dates
- ✓ Documents
 - Absence Occurrence
 - Blank Schedule



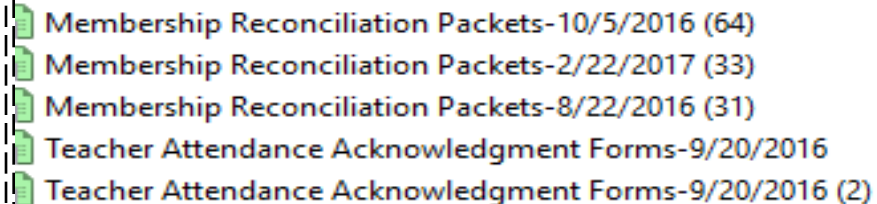
✓ 6 Weeks

- ✓ 1st - 6th 6 weeks
- ✓ Documents
 - Discipline Attendance
 - Special Programs reports



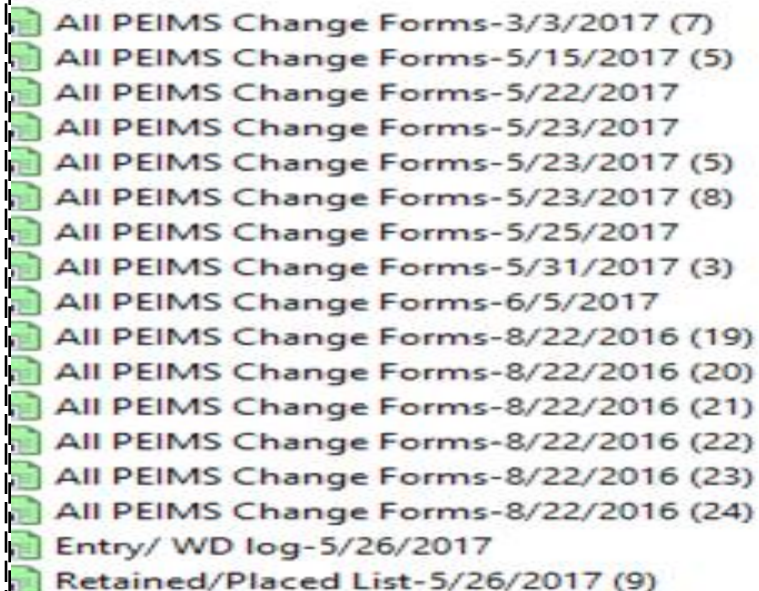
PEIMS

- ✓ **PEIMS**
 - ✓ *Attendance PEIMS documents*
 - *Membership Reconciliation*
 - ✓ *Registrar PEIMS documents*
 - *PEIMS change forms*
 - *Retained/Placed List*
 - *Entry/Withdraw log*
 - ✓ *Submission 1 and 3*
 - *Pre PEIMS*
 - *Finalized*



A screenshot of a file explorer window showing a list of PEIMS documents. The documents are listed with green folder icons and include dates and counts in parentheses. The list is as follows:

- Membership Reconciliation Packets-10/5/2016 (64)
- Membership Reconciliation Packets-2/22/2017 (33)
- Membership Reconciliation Packets-8/22/2016 (31)
- Teacher Attendance Acknowledgment Forms-9/20/2016
- Teacher Attendance Acknowledgment Forms-9/20/2016 (2)



A screenshot of a file explorer window showing a list of PEIMS documents. The documents are listed with green folder icons and include dates and counts in parentheses. The list is as follows:

- All PEIMS Change Forms-3/3/2017 (7)
- All PEIMS Change Forms-5/15/2017 (5)
- All PEIMS Change Forms-5/22/2017
- All PEIMS Change Forms-5/23/2017
- All PEIMS Change Forms-5/23/2017 (5)
- All PEIMS Change Forms-5/23/2017 (8)
- All PEIMS Change Forms-5/25/2017
- All PEIMS Change Forms-5/31/2017 (3)
- All PEIMS Change Forms-6/5/2017
- All PEIMS Change Forms-8/22/2016 (19)
- All PEIMS Change Forms-8/22/2016 (20)
- All PEIMS Change Forms-8/22/2016 (21)
- All PEIMS Change Forms-8/22/2016 (22)
- All PEIMS Change Forms-8/22/2016 (23)
- All PEIMS Change Forms-8/22/2016 (24)
- Entry/ WD log-5/26/2017
- Retained/Placed List-5/26/2017 (9)

As of 18 -19 School Year

- ✓ **Student Discipline**
 - ✓ Added 20 more full user licenses
 - ✓ AP secretaries scanning and using Laserfiche Snapshot
 - ✓ Everything is labeled in each folder
 - ✓ Organized into separate categories
 - ✓ Easier to file - Just scan and label
- ✓ **Warehouse storage**
 - ✓ Last year district wide (all) campuses sent over 50 boxes of discipline records from the 17-18 school year.
 - ✓ We have over 300 boxes of just discipline records being stored at the warehouse from the past years
 - ✓ Records Destruction for 200 boxes cost \$1200.00
- ✓ **Career and Technical Education (CTE)**
 - ✓ Student Industry Certification Laserfiche form for students to upload their certificate for specialized certifications



Feedback

- ✓ **Attendance Coordinator**
 - ✓ *Can help or check on campus from office and do not have to leave the office.*
 - ✓ *Faster way to find what you are looking for instead of going through folder*
 - ✓ *Everything is labeled in each folder*
 - ✓ *Organized into separate categories*
 - ✓ *Easier to file - Just scan and label*
 - ✓ *Discipline clean up is now completed without having campus staff leaving campus*
 - *Staff scans Discipline/Attendance reports into work queue, reports can be reviewed at my desk and I highlight any errors for the staff to fix*
 - ✓ *Highlight and write notes on all reports through Laserfiche which helps with reconciliation of daily folders*
 - ✓ *Easier to make copies of attendance notes without making copies and fixing paper jams*



Laserfiche Forms

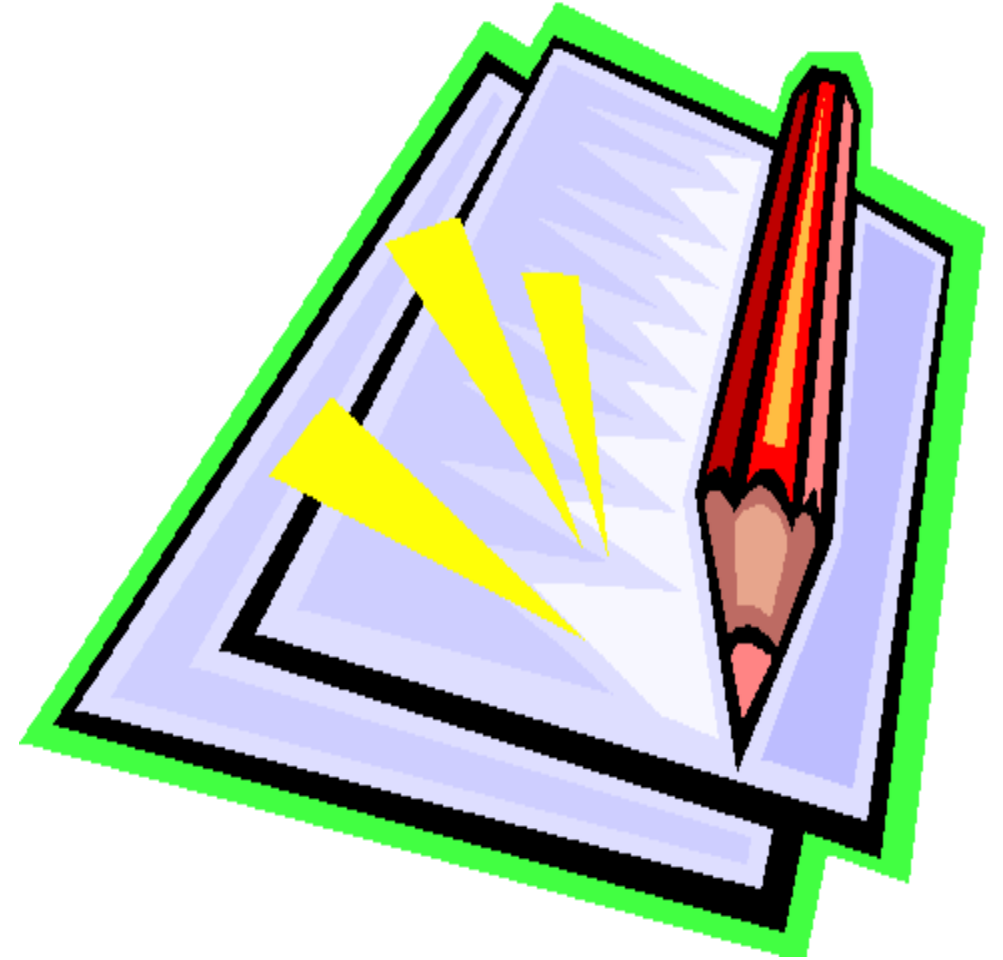
✓ Laserfiche Student Forms

- ✓ Athletics UIL-Physical
- ✓ Attendance Notes
- ✓ Chromebook Incident
- ✓ Course Request Form
- ✓ CTE Update
- ✓ Documentation of Attempts
- ✓ LEP Input
- ✓ LEP STAAR Participation
- ✓ NCISD Restraint
- ✓ PEIMS Program Change Form
- ✓ Request for Inactive Student Cumulative Folder
- ✓ Recommendation for Administrative Withdrawal
- ✓ Schedule Change Form
- ✓ SPPG Scan
- ✓ Student Transfer Form
- ✓ TREX Export

✓ Laserfiche HR/Finance

- ✓ 45 forms in use

- ✓ We have created over 400 forms



✓ **Cost Savings**

- ✓ *\$950,000 savings in fire proof safes for records storage to meet state guidelines*
- ✓ *\$15,000 in paper savings of 500 cases a paper a year*
- ✓ *20,000 man hours saved on filing student documents.*
- ✓ *Reduced time for accessing records across campuses to 30 minutes verse several days*
- ✓ *300,000 Sq Feet of office space recaptured by transitioning records to digital storage in Laserfiche*
- ✓ *Ability to access student records digitally by all parties allows for more timely decisions to be made on students Versus waiting on the student records to be returned by one department*
- ✓ *The district saved over \$330,000 by choosing to implement Laserfiche instead of outsourcing records scanning*



Questions?
Thank you!



25-26 LASERFICHE UPDATE

- Full User license – 1000/568 in use
 - Educational License 5000/1991 in use
 - LF forms – current live forms 342
 - Workflows – too many to count
 - Servers – 24 onsite
 - Repositories - 7
-

Contact Us For More Information about Laserfiche & New Caney ISD's Implementation

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Records Management Officer
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tyarbrough@newcaneyisd.org***