STUDENT RECORDS

Keeping confidential student information secure is crucial to complying with federal and state requirements, but administering records access under FERPA, CIPA and HIPAA consumes staff time.

This section contains solutions for managing records that balances compliance, security and accessibility.

ADAMS 12 SCHOOL DISTRICT

Industry: Education
Number of employees: 1,000 - 5,000
Headquarters: Thornton, CO
Existing Laserfiche integrations: Infinite Campus Student Records Database, PeopleSoft, LincDoc, and Affinity

Adams 12 is the fifth largest school district in Colorado with 5,000 employees and 39,500 students.

Since we have roughly 8,500 graduates and withdrawals annually, there are a large number of student records that need archiving.

Here is how we use Laserfiche to simplify the student records process.

Traves McCabe, Records Manager, describes how Colorado's Adams 12 School District uses Laserfiche to improve response times for student record requests.

STUDENT RECORDS

At the district office, we keep records of students who have either graduated or withdrawn. We also handle an average of 276 requests for transcripts, employment verifications and immunization verifications a month.

1. After the records arrive at the district office, our records technician goes through each student record and purges any documents that do not need to be retained, such as student photographs. Registrars also assist with this process before sending the documents to the district office.

2. Once the records are organized, our records technician prints a barcode cover sheet for each set of records. These cover sheets are printed from a Microsoft Access database that is regularly updated with data from our Infinite Campus student records system.

There are two different barcodes on the sheet. The top one is from our old student records system SASI, and the bottom one from Infinite Campus, which we've been using since 2009. These barcodes are our way of identifying in which database the student data is stored.

0000000000

IMAGES

LAST NAME	DOE
FIRST NAME	JOHN
MIDDLE NAME	BARRY
OTHER	
BIRTHDATE	04/15/1975
SSN	555-55-5555
STUDENTNO	0000999999
INFINITE CAMPUS ID	
STATE ID	
SPECIAL ED	NO
NOTES	
STATUS	GRADUATED
SPECIAL ED FILM ROL	
FILM ROLL	105SG,09LF
ENTER DATE	1/1/97
EXIT DATE	6/6/97
SCHOOL	399
SCHOOL NAME	High Plains High School

3. Once the cover sheets are printed, each one is appended to the corresponding documents. We create a batch of about 500 sheets which we run through a multi-purpose scanner (Kofax VRS) and scan directly into Laserfiche.

4. Once all the student record documents have been scanned, they are processed with Laserfiche Quick Fields. We use the Barcode process to read the student number from the barcode. This student number is then used in the Lookup process to gather the information from our student records system and populate the rest of the metadata. This prevents mistakes by reducing manual data entry.

5. Finally, we run the OmniPage OCR process in the off hours to best utilize our time and resources.
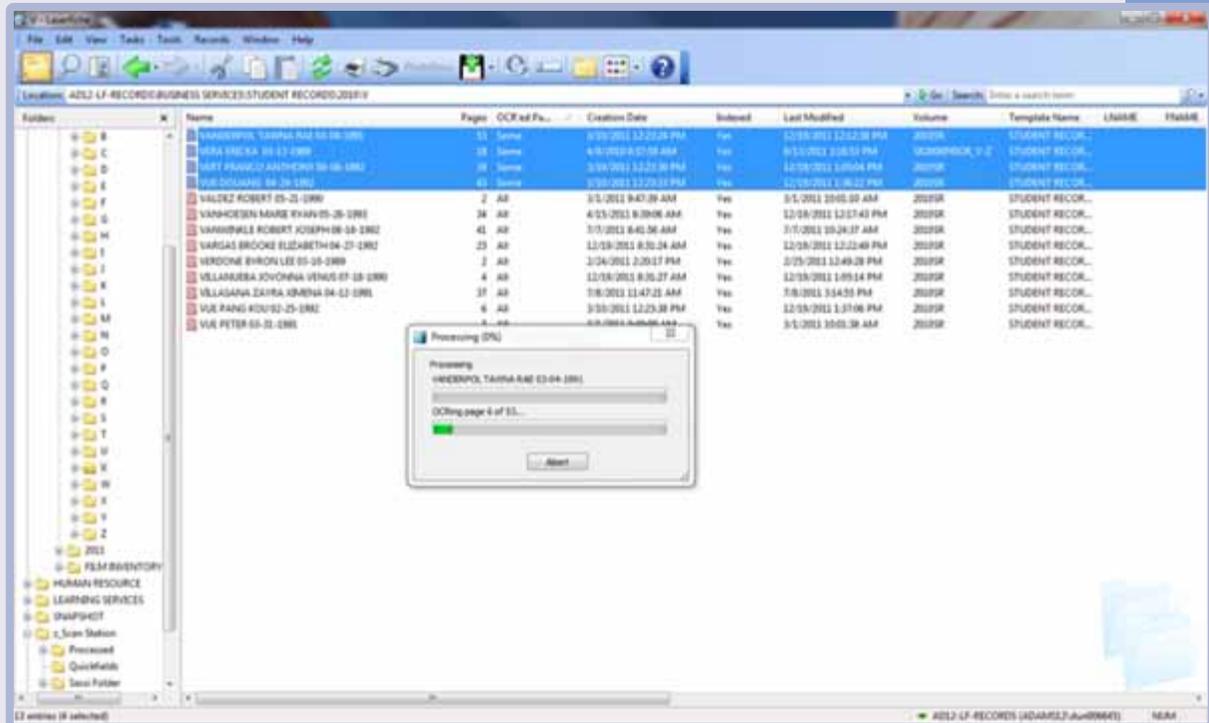
6. We use Laserfiche Records Management Edition to archive all of our student records.

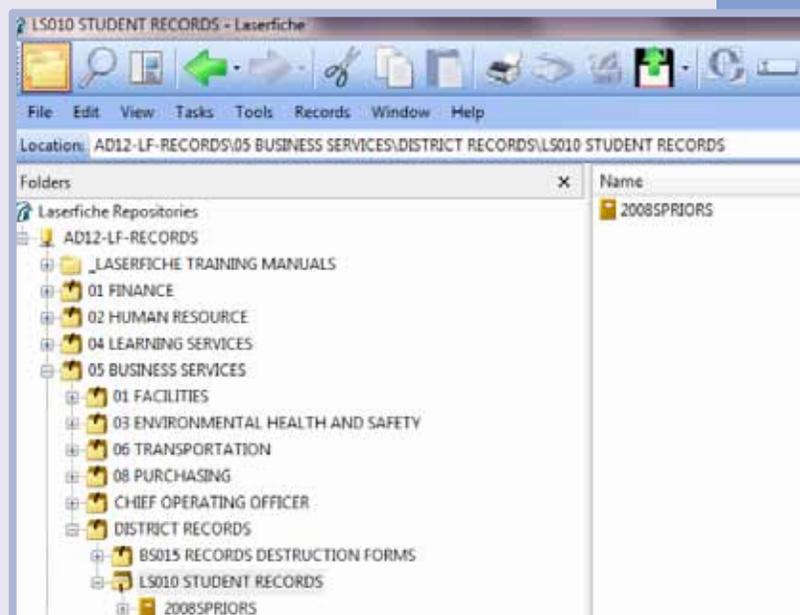Though the records are stored permanently, I set up a retention schedule of "100 years, then review" because it is best to review these records and re-evaluate the retention against the schedule.

Record Folder Properties

2008SPRIORS

Filing Date: 6/ 4/2010

☑ Designate records within this collection as permanent

Cutoff Instruction

Name:	STUDENT GRADUATED OR WITHDRAWN		
Type:	Event (All)	Cycle:	N/A
Interval:	N/A	Location:	N/A
Linked Document Action:	N/A	Document Relationship:	N/A

Retention Schedule

Name:	100 Years, then review		
Final Disposition Type:	None	Retain for:	100 year(s), 0 month(s)
Final Disposition Location:	N/A	Keep Metadata:	N/A
Alt. Retention Event:	N/A	Alt. Ret. Schedule:	N/A

Vital Records

☑ Designate records within this collection as vital   Review Cycle: FY (Fiscal Yearly)

Disposition Authority:

[OK]   [Cancel]   [Help]

7. Retrieving a transcript is now as easy as performing a search in Laserfiche on the unique Student Number.

EFFICIENCIES GAINED

Transitioning from microfilm to Laserfiche has resulted in the following efficiencies:

	MICROFILM	LASERFICHE
Scan/Film Minutes	240	47
Retreival/Print Per Request	2.5 Minutes	47 Seconds
Film/ Development Cost/Shipping	$24.95 Per roll	None
Paper Count	7,500	7,500
State Archives Approval Before Destruction	2-12 Weeks	None
Development Time	1 Week	Instant
Quality Control	2 Hours per roll. Each roll is 1 banker's box.	45 Minutes per banker's box.
Toner Cost/3500 Copies	$201.00 per cartridge.	None

OKLAHOMA CHRISTIAN UNIVERSITY

Industry: Higher Education
Number of employees: 100-500
Headquarters: Oklahoma City, OK
Existing Laserfiche integrations: Microsoft Sharepoint, Datatel Colleague (Ellucian), LincDoc

Oklahoma Christian University (OC)'s modest size offers big innovation: the private liberal arts college with 2,200 students and more than 60 degree programs is a visionary leader in advanced teaching and learning methods.

In 2010, OC implemented Laserfiche in the Student Financial Services Department and has since expanded it to other departments. Before implementing Laserfiche, OC's financial aid office struggled to output financial aid offers quickly with a paper-intensive application process, ultimately frustrating students and parents.

Here is how OC improved student financial services and obtained $31,000 of hard savings in under two years by integrating Laserfiche with its existing Datatel Colleague ERP system (now known as Ellucian) and LincDoc eForms Creator.

Clint LaRue, Director of Student Financial Services at Oklahoma Christian University, demonstrates how integrating Laserfiche with Datatel Colleague, and LincDoc has simplified how the financial aid department manages student paperwork.

THE COMPLETE PROCESS

Every Oklahoma Christian University (OCU) student is assigned a personal network account that they can use to log into the MyOC portal, which provides students with campus news, e-mail, news about upcoming events and more. This portal is integrated with our Datatel Colleague ERP System and is built on Microsoft SharePoint. Here's the screen a student sees when logged into the portal:

This portal also allows students to manage their financial aid forms. Under the Services section and My Financial Aid, there is a Missing Documents link. Clicking on this link brings the student to a new screen which lists and describes all of the missing documents he must submit.

Missing Documents

Sarah

Current Awards

Accept Awards

Check for missing items

Award History

Before Oklahoma Christian can complete your financial aid file for 2011-2012, you need to complete the missing document(s) shown below.

Missing Documents for 2011-2012

Missing Items	Status
Parent's Signed Tax Forms Your FAFSA has been selected for a process called verification by the Department of Education. A signed and dated copy of your parents' prior year Federal Income Tax Return is required. If your parents do not have a copy, they can request one from the IRS by calling 1-800-829-1040.	Missing
Dependent Verification Worksheet Dependent Verification Worksheet - **Your username is your first name followed by a period and then your last name. For example, it would be "john.doe". The password to login is your MyOC password.** - Your FAFSA has been selected for a process called verification by the U.S. Department of Education. Please complete and sign the online worksheet verifying the number of people living in your household as well as certain income information. Financial aid cannot be disbursed until the worksheet is completed (by the student and parent) and reviewed by the Student Financial Services Office.	Missing
Asset Information Worksheet Asset Information Worksheet - **Your username is your first name followed by a period and then your last name. For example, it would be "john.doe". The password to login is your MyOC password.** Your FAFSA has been selected for a process called verification by the U.S. Department of Education. Please complete and sign the online worksheet showing totals of assests for both student and parents or spouse.	Missing

Our staff creates these documents through the LincDoc eForms Creator and then manually embeds the links to the forms in the student portal. For example, if a student clicks on the Asset Information Worksheet link in her Missing Documents section, she can open the following form after using her personal network ID and password to log into the LincDoc environment.

Section School Year Selection

Asset Information Worksheet

| Which School year are you filling this out for? | 2011-2012 ▾ | |

Section 1.0: Asset Information Worksheet

We need more information to complete the Free Application for Federal Student Aid you submitted to the Federal Government. Please provide us with the following information, as of the date you completed your FAFSA.

Student's First Name:	Clint
Student's Last Name:	Larue
Student ID Number	1000101

Section 2.0: Student's Information

Student's (& spouse) Asset Information Note:Do not leave blanks. If the answer is 0, then write 0.

| Current balance of Cash, Savings & Checking accounts (Do not include student financial aid) | |
| Current net worth of investments (Including real-estate – NOT your home) | |
| Current net worth of business or Investment farm (Do not include a farm you live on) | |

Section 2.5: Parent's Information

▸ The Student ID Number, Student's First Name and Student's Last Name fields are automatically populated based on the information supplied during the login process.

▸ Once the student and parent sign the form and click Submit, Laserfiche Workflow automatically routes the form to one of the subfolders inside the _TO BE FILED folder in Laserfiche.

▸ Depending on whether—and what—information is still missing, this form can be initially classified as either Award, probation and suspension, Need Counselor Number or Need Student Name and File.

🗁 _TO BE FILED	🗎 Henry, Caleb	2	1405397		Henry	Caleb
🗁 Award, probation and suspens	🗎 Granados, Cristal 3.7 As...	1	1468891	11-12	Granados	Cristal
🗁 Need Counselor Number	🗎 Granados, Cristal 1.4 Pa...	1	1468891	11-12	Granados	Cristal
🗁 Need Student Name and File	🗎 Gladfelter, Gabriella 3.3 ...	3	1400378	11-12	Gladfelter	Gabriella
🗁 FILE ROOM						

We run Laserfiche Quick Fields sessions multiple times daily to further process and OCR the documents that arrive in those folders, with a different Quick Fields session for documents stored in each folder.

The session below processes the documents in the Need Counselor Number folder.

▸ Quick Fields identifies the Student ID and looks up the name of the appropriate Financial Aid Counselor, who is automatically assigned student files based on students' last names, in the Datatel Colleague database.

▸ Workflow then routes the document to the Financial Aid Counselor responsible for this student. Each counselor has his or her own 01_Enter in Datatel folder in Laserfiche where these documents are then stored.
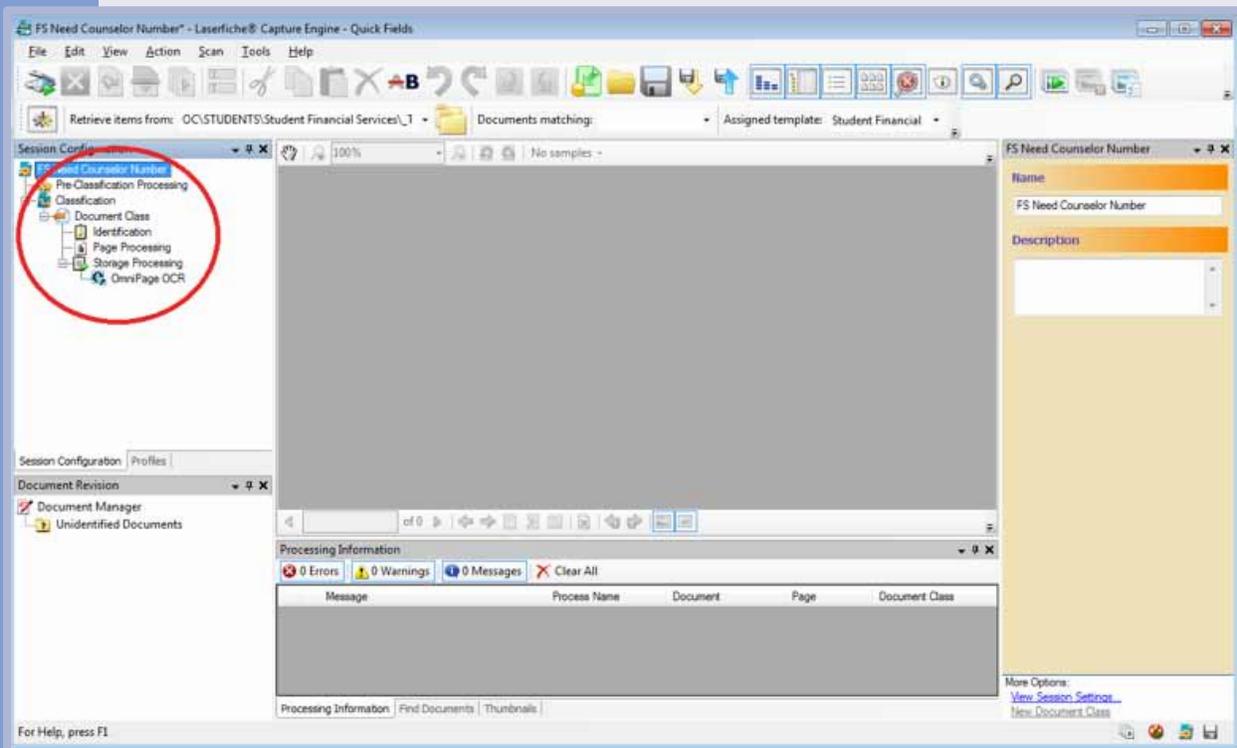
Here's how the folder of newly assigned student records appears to a Financial Aid Counselor in Laserfiche:
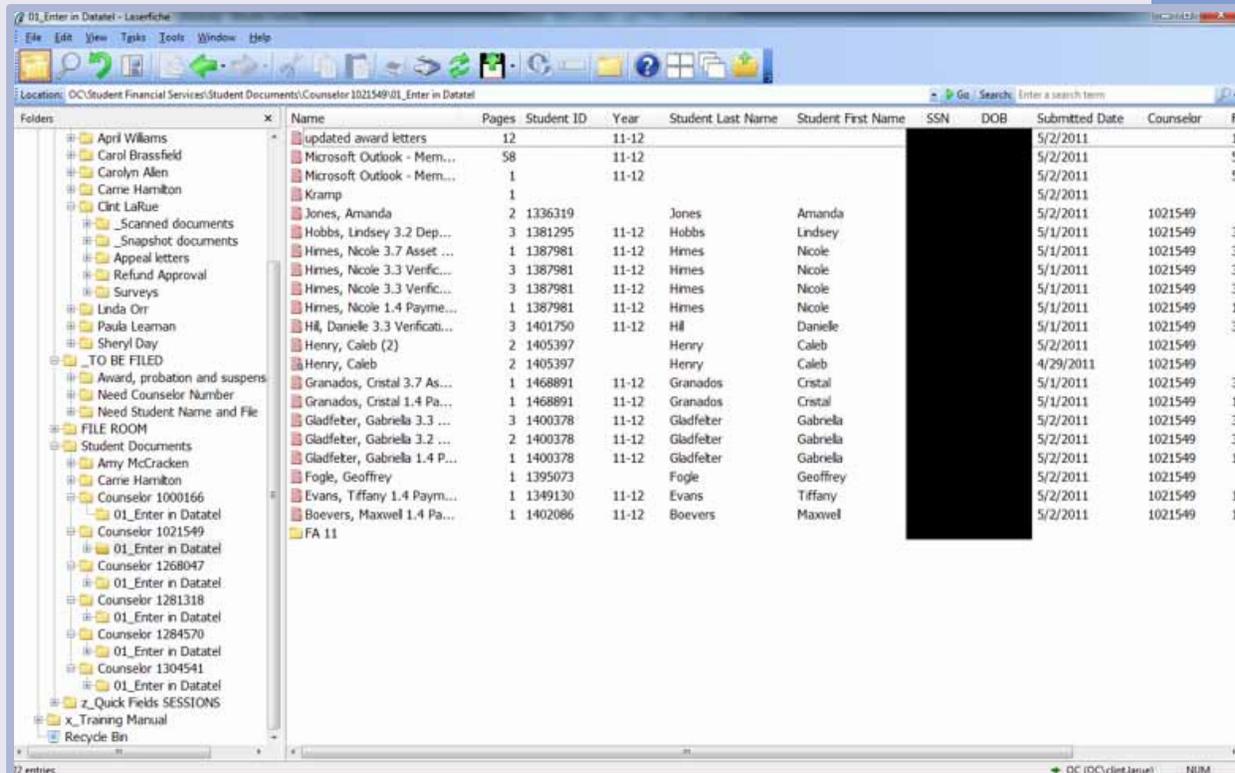
Every Financial Aid Counselor has access to his or her folder in Laserfiche from the Datatel Colleague environment, which provides easy access to documents. Through our Laserfiche integration with Datatel, an Affinity button is available in the toolbar of Datatel Colleague. A Financial Aid Counselor can simply click on the binoculars icon to pull up the relevant student documents in Laserfiche:
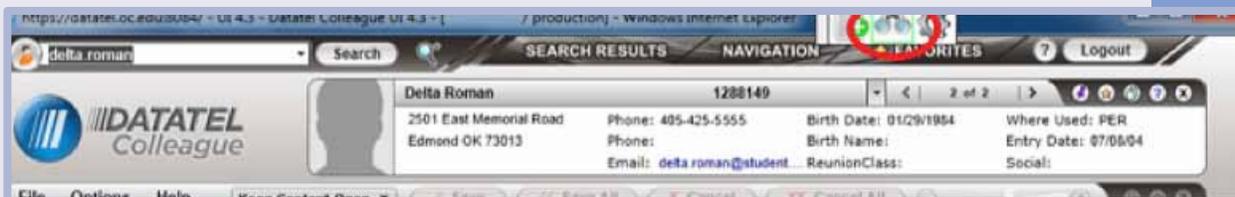
The Financial Aid Counselor then opens the submitted form in Laserfiche and reviews it to make sure everything has been filled out correctly. S/he then selects Received from the PFC Reviewed list field in the assigned template.

Once the metadata is finalized, Workflow moves the document from the Financial Aid Counselor's folder into the relevant subfolder within the overall FILE_ROOM folder in the financial aid department's Laserfiche repository.

The Financial Aid Counselor then logs into Datatel Colleague and changes the status of the document to Received in CRI. This updates the document section of the student's MyOC Portal so that this document is no longer labeled as missing.

SUMMARY OF BENEFITS FOR OKLAHOMA CHRISTIAN UNIVERSITY

By integrating Laserfiche with existing systems, the financial aid office has streamlined the entire financial aid award process. Today:

▶ Financial Aid Counselors can respond immediately to students who inquire about their financial aid status by pulling up their entire files right from their desktops.

▶ It is easy to track employee efficiency by simply looking at how many documents are in their folders, which have been processed and which still need to be processed. This allows management to delegate workloads more efficiently to staff and address underperformance.

▶ Students may easily submit information electronically, reducing incoming mail from all over the world and saving OCU $31,000 in paper, mailing and storage costs a year.