

School System Graduates to Electronic Document Management

Traditional values abound in Kent County, a rural area located on Maryland's Eastern Shore that boasts a population of right around 20,000. Teamwork and a "can-do" attitude find their way into every facet of county life, including among government entities.

"County agencies have good relationships with each other," says Frances "Fay" Miller. "They work well together. You're much more likely to hear someone say, 'I'm sure we can figure out a way to do that' than you are to hear, 'sorry, that's not my job.'"

This teamwork surfaced recently at the administrative offices of the **Kent County Public Schools**, when a call came in from the local Social Security office. "They had a very elderly lady who was trying to get Social Security benefits," Miller recalls. "She had no idea when her birthday was." The folks at Social Security needed the date of birth to start processing benefits for the woman.

She did know roughly how old she was, but didn't know the exact date of birth. She didn't even know precisely when she attended school. She just knew she did.

So Social Security called on school district personnel for help. "They gave us her name, the name of the school she attended, and the rough guess - within a few years - of when she was in school," Miller recalls.

In some places, such a request would set off a trip to the basement, followed by hours of searching through storage boxes piled ceiling high that hold dog-eared file folders full of fading, yellowed student records. But not in Kent County.

In a matter of minutes, school system Data Specialist Georgia Sweetman found the woman's records and provided Social Security the exact birth date. "Because all of our records are in the docSTAR system, we were able to get her records and help her get benefits, which would not have been possible without proof of age," Miller says. Without docSTAR, the school system might not have been able to handle the request and would have required a significant wait. And the woman didn't have a lot of time to wait.

Data kept growing

So what led Kent County Schools to convert its student records - and more - to digital? The eight-school district, which serves more than 2,000 students, needed a way to preserve files so they could be easily accessed whenever they were needed.

According to Sweetman, the school system was holding on fourteen or fifteen years worth of paper records - information on graduates, as well as students deemed inactive because they left via transfer or for some other reason. "It was piled in boxes," she recalls. "It was very hard when we had transcript requests." But the paper files were only part of the worries.

Older records were stored on microfilm. "In some cases, these weren't filed in alphabetical order or even by year," she explains. "So it caused real problems with some of the requests that came in." Those seeking transcripts or other information didn't want to hear excuses. They needed the records, and they needed them quickly.

As bad as delays were, a bigger problem was looming. "We were very concerned about the condition of the microfilm," Miller relates. "Films were getting brittle, the machine used to read them was wearing out, parts were hard to come by and the cost to replace the unit was quite high. The amount of money they wanted for us to be able to bring the machine current was more than we could justify," she adds. "We just kind of kept putting it off." Meanwhile, the paper records kept piling up.

Transcripts and student records weren't the only files the school system needed to get under control. Transportation and food service files were also getting out of hand.

Kent County Schools' entire bus fleet is contracted. The system doesn't own any busses and all of the drivers are contract employees. But it doesn't matter to the State who owns the fleet or employs the staff. According to Margaret Ellen Kalmanowicz, Kent County Public Schools supervisor of transportation and food service, "We still need to maintain records. These records cover regular bus routes, sports runs, field trips, special transportation needs, the number of students served per run and more."

Despite how far back the State says records should go, when it comes time for an audit, all bets are off. "They say you only have to keep them so long, but as a school system you might as well forget that," Miller says. "At times, it seems they want the records forever. We just had the state legislative audits, and it was only supposed to go back for five years," she explains. "Well it went back a lot farther than that."

Finding relief

According to Kalmanowicz, school administrators learned of docSTAR and its electronic document management capabilities while attending a school board officials' conference. "I thought the applications docSTAR demonstrated could definitely help the school system in transportation and food service," she recalls. "We have to keep a great deal of information for a number of years."

After the conference, administrators discussed the possibility of digitizing documents and explored their options. "Most of the firms we talked with wanted a lot more money for something that was much more complicated," Miller recalls. "We discussed the choices and realized that, for a financial investment we could justify, docSTAR offered a tremendous system that was very simple to use."

In addition to system functionality, Kent County Schools administrators were impressed with the helpfulness of local docSTAR partner MEDI, based in Millersville, Maryland. "They came and sat down and talked to us, and they took a lot of time to answer all of our questions," Miller explains.

After deciding on docSTAR three years ago, school system officials installed one system in the student records area and set about getting paper files onto the system. Then they tackled the microfilm. "A lot of it was damaged," Miller says. "That's been the hardest part." MEDI and docSTAR set up a process that

allowed school system staff to take images right off of film and convert them directly into records in docSTAR, eliminating the need to print paper documents from brittle film and then scan them.

Now, when each school year ends, it only takes a couple of weeks to transfer paper files from all of the schools to a digital format. "Each year, it will only take a short amount of time to update the records," Miller says.

The student records department wasn't the only one to get a docSTAR system. Transportation and food service had one installed in their office too. They quickly started converting paper to digital documents, starting with food service. "There is a great deal of information we have to keep for a number of years," Kalmanowicz says. "This includes production sheets, food orders, billing and invoices, student account records, meal subsidy information and more. The information comes from all eight schools in the district."

Having documents available electronically comes in handy when questions arise. "We keep all of the billing information for milk, bread, ice cream - all of our food orders," Kalmanowicz says. "If you need an invoice number or if there are any billing questions, we can find that easily."

"In audits, we're able to pull up requested information quickly, instead of going back into boxes from years ago and trying to sort through it," she adds. "The uses are just about endless."

Transportation finds similar benefits. Billing, field trip information, bus routes for all of the schools, special trips, contractor payments, memos, and more are now stored electronically. Retrieval is a breeze. "You simply put in a key phrase or words about a particular subject," Kalmanowicz says, "and all of the information related to it comes up."

In the transportation and food service operation, documents are scanned into the system constantly. "It's just part of our department's daily work," Kalmanowicz says. Five people in her office use a single department-wide scanner to process documents, which then can be retrieved from any of the unit's other four workstations.

According to Kalmanowicz, there was a relatively modest learning curve when her department implemented scanning. "But everyone at this point knows how to use the system and how to get the correct files out of it," she says. "Things work a little more smoothly because MEDI got the unit jump-started on template creation. Before long, department staff found it easy to handle that on their own, setting up scanning protocols that would allow them to find and retrieve documents more easily down the road."

Speedy response

Once they scanned the backlog of records, staff really started seeing payback. Former students and others who needed information suddenly seemed much happier. "People will just walk in and need a copy of their transcript," Sweetman says. "Before docSTAR, if they were lucky, someone might be able to find the record right away. But more often than not, a return visit was required, or school officials would have to send the document."

"Now when they walk out, they have their information with them," she adds. "Plus, the school system can send a copy to wherever it's needed - a college admissions office, for instance, at the same time."

Retrieval speed is enhanced by the search options docSTAR offers. Sweetman appreciated having the ability to search the system using any number of keywords. "You sometimes have a name misspelled, so you can search by first name, date of birth, graduation year, when they left the school system and so on," she says. "So even if you have a problem with one field, it's easy to go find the record another way and retrieve it."

The speed and accuracy that docSTAR helps deliver has cut down on phone calls - at least some of them. "What would happen before is people would call in for a copy of a transcript," Miller explains. "Because of the paper and microfilm filing, it wasn't always possible to respond immediately. When we couldn't get them something in a timely fashion, people would complain to school board members. Then our phones would ring." Miller can't recall a single school board complaint since they started the system. "Not one," she says.

Ongoing service

Miller, Sweetman and Kalmanowicz speak highly of the service they receive from MEDI. "When these ladies have some kind of a problem, if something goes wrong, they call and they're here within a very short period of time," Miller says. "They have the problem solved like that."

Sweetman explains, "The microfilms are quite brittle and we had them break in the machine a couple of times. We'd call the company, and they'd be there either that day or the next. They're very quick to respond and they're very helpful."

MEDI service reps even let school officials observe them as they're working on something. "We just had DVDs formatted and they explained the process, showing us how things work so we can do it the next time," Sweetman adds. "But we still can call them if we need help."

On the horizon

With successful implementation in two departments, Kent County Schools is looking for other ways docSTAR can help streamline operations. "We're thinking about potentially using the system for our personnel records," Miller says. "Right now, they are all still on paper."

Certain non-transcript related student records may also be good candidates for electronic document management. "I can certainly see this being used for information related to special education," Sweetman says. "Disciplinary information could also be kept electronically."

Other non-transportation or food services billing and financial records could also make the transition to digital format, with little trouble and potentially significant benefits. "We have to keep all billing information, in particular, for at least six years," Sweetman says. "It's helpful to have more records available electronically," she notes, "because this makes retrieval much easier, something that comes in handy when the auditors show up. We're having more and more audits every year," she adds.

How will the school system expand its use of docSTAR? "As we get one job done we might say, okay, we're ready to start to do the same thing with another area," says Miller. That, after all, is probably the way most things get done in Kent County.