IN THE BEGINNING

With piles of paperwork growing leaps and bounds, Lori Robertson, Business Manager of Clear Creek Amana Community School District (CCACSD), realized major inefficiencies in the school offices. There were also the costs of purchasing paper, printer toner, physical filing cabinets, as well as the risks of storing the paper in-house to consider. Coupled with the frustrations of trying to retrieve documents, Ms. Robertson knew there had to be a better way.

CCACSD has been using Software Unlimited Inc.'s (SUI) School Accounting System for more than 30 years and have implemented many of the feature-rich capabilities, which has helped streamline their accounting processes significantly. However, there were still loads of paper files that were tied to vendors, employees and students which also needed to be managed. When SUI reached out for early adopters to test their new integrated document management solution, called K12Docs, Ms. Robertson was one of the first to raise her hand.

Shortly after the cloud-based K12Docs solution was implemented, CCACSD started scanning and indexing invoices and associating them with vendors and AP transactions in the School Accounting System. "We are so efficient. Now when we need to pull up an invoice to review", says Ms. Robertson, "we just find the vendor in the School Accounting System and an icon shows us that the invoice is attached, where we can select and view the document. I can see it easing the frustration of preparing for audits as well. Everything is at our fingertips."

WHAT'S NEXT

As they say, success breeds success and soon after, Sue Wilber, Director of Human Resources was inquiring if K12Docs could be used for her HR documents. HR quickly developed an employee onboarding solution that was 95% paperless. With an online forms software, Ms. Wilber can send a link to new employees where they can fill out and sign all their documents online. When submitted, the documents go to payroll for employee set-up in the School Accounting System and all forms are pushed into K12Docs in the correct employee folder via integration with her online forms solution. CCACSD hires on average 25+ new employees each year, so this workflow should save significant time for the HR team. "There are a lot of other forms and documents that can be automated, and we are evaluating how we can leverage this technology further throughout the district", says Ms. Wilber.

The school district is currently scanning all their active student records into K12Docs. Integration with their PowerSchool Student Information System has aided in the creation and update of student records within K12Docs, and each school is responsible for scanning and indexing their student folders. Ms. Robertson says, "This will save a tremendous amount of space and time to find records when we need them, especially when a student moves from one school to another".

THE RESULTS

CCACSD is on their way to a paperless environment district-wide. Instead of using and storing reams of paper, slow processes, time filing documents and difficulty finding documents, the school system has a fast, efficient, and cost affective electronic document management solution. Through thoughtful planning and preparation, Ms. Robertson and CCACSD are now enjoying more productivity and streamlined operations.

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>
> *Lori Robertson,*
> *Business Manager of Clear Creek Amana School District*

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school accounting system