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## Case Study:

# West Mifflin Area School District Goes Paperless with Imaging and ECM



Located 20 miles south of Pittsburgh, PA, the West Mifflin Area School District (WMASD) is dedicated to educating more than 3,000 students in grades K-12.

Comprised of three elementary schools, a new middle school, and one high school, the district employs 375 educators and support staff. WMASD is constantly looking for innovative ways to help teachers and advance student learning.

To that end, WMASD began envisioning ways to incorporate technology that would allow students to compete in an ever-changing world. Students are experiencing the integration of technology through the support of the school board and the state funded Classrooms for the Future.

This new technology, providing for laptop computers, white boards, web cameras and professional development for teachers, is preparing WMASD for global success.

### Background

As part of their technology initiative, the district recognized that by going paperless and implementing electronic document management (EDM) throughout all five schools, they would dramatically increase efficiency and expedite services to students, staff, and stakeholders.

WMASD needed an easy, space-efficient way to store student records and meet local and state mandated record requirements. Ultimately, they hoped to streamline and standardize student record retention district-wide.

The district asked Paperless Technologies, a division of Ford Business Machines (their copier and printer dealer), to recommend an imaging and document management system.

Paperless Technologies recommended using electronic document management software from

DocFinity, which they implemented. EDM has enabled WMASD to improve the following initiatives:

- Disaster recovery
- Security
- Accessibility and response times
- Accuracy and accountability

### The First Step: Backfile Scanning

Joel Tachoir, the Director of Technology for the district, recalls, "Our superintendent at the time was very excited about the prospect of going paperless. The first several document types we made paperless were school board minutes, personnel files, student transcripts, and board agendas. Paperless Technologies did the backfile scanning for us. We had boxes and boxes and boxes of paper to scan—it ended up being about half a million pages."

DocFinity is used to electronically store board minutes, state audits, financial reports, and various technology forms. Documents associated with student records such as transcripts, enrollment records, student internet use policy forms, prior grade reports, withdrawal and transfer forms, custody documents, and student work permits are also stored in DocFinity.

Paperless processing ensures that the district has immediate, secure access to records that previously were difficult and time-consuming to retrieve.

### Expediting Student Transcript Requests

Tachoir says, "The biggest feedback we get is from the guidance department at the high school. They get requests on a daily basis for transcripts that might be 10 years old, 50 years old, or anywhere in between. They are amazed at how easy it is to get documents out of DocFinity. You search for a name, click on it, convert the document to a PDF, and send it to the person who requested it."



The paperless system offers benefits beyond immediate access to the guidance department:

- **Redaction capabilities.** The student transcript sometimes includes a photograph, which has to be removed prior to sending the transcript to a college. The EDM system makes it easy to redact sensitive information such as photographs or social security numbers.
- **Easy search.** Transcripts are indexed by name, year of graduation, and date of birth. Previously, when requestors had forgotten to include their maiden name on a transcript request, follow-up by phone or email was required. Now, the department simply searches on date of birth to find the requested document.
- **Web accessibility.** Paper records were stored throughout the building wherever space was available, which complicated timely retrieval. Now, the department can perform secure searches from any web browser.

“The Guidance Department is amazed at how easy it is to get documents out of DocFinity. You search for a name, click on it, convert the document to a PDF, and send it to the person who requested it.”

— Joel Tachoir,  
Director of Technology

## Potential Plans for the Future

In many ways, WMASD is breaking new ground by going paperless. A majority of schools still rely upon paper to drive their business processes. Some schools adopt point solutions that address efficiency in a single department (for example, transcripts or accounting); however, Tachoir says that it is rare to see paperless processing implemented across an entire school district.

Tachoir says, “We’ve been very pleased with the DocFinity system. It solved our most pressing issues with paper, and gave us a foundation to further improve our entire district in the future.” He estimates that the district is currently in phase two of a three-phase operation. At the completion of phase three, ideally the entire district will have adopted paperless processing. Some of the functionality that he hopes to incorporate in the future includes:

- **Searchable PDFs.** Any school district can appreciate the value of being able to electronically search school board meeting minutes and other PDFs. WMASD is considering implementing DocFinity’s enterprise search module, which enables keyword searching across PDFs and other documents with the same ease, familiarity, and functionality that people have come to expect from online search engines such as Google.
- **Online electronic forms.** Incorporating DocFinity eForms would enable WMASD to fulfil Open Records requests in an efficient and timely manner. Coupled with workflow, the software enables electronic routing of forms for fulfillment, and can automate responses to the person requesting information. eForms can even provide audit trails for requests and responses. The software could also be used to enable submission of student forms and documents through the district’s website. Currently, the website makes student forms available as downloadable PDFs,

which can be printed, filled out, and mailed to the school. eForms would expedite services by eliminating the need to create the paper in the first place.

- **Integration.** WMASD hopes to integrate DocFinity with PowerSchool and other applications that are used within the district. This would enable end users to access the system by clicking on a button from within their familiar applications—eliminating the need to learn new software.
- **Optimizing electronic student records from enrollment to matriculation.** Tachoir says, “We can significantly improve processes when we go paperless with student records.” He elaborates, “The paperwork starts with enrollment. We keep a couple of copies of the paperwork in the central office and send the folder over to the school. As the student goes through the school, papers are added to the student record, which then gets passed to the middle school. Then it gets passed to the high school. The folder grows and grows. Sometimes papers get taken out, and sometimes they get lost. Sometimes they get put in different folders. If the central office needs the file, it may take days to get there.” Tachoir anticipates making the entire student record electronic during the third phase of the project. This which would provide immediate, secure web access to the documents that comprise the student record.

Paperless processing is a lofty endeavor for any organization, but West Mifflin Area School District is well on its way to achieving that goal. Along the way, the district will improve disaster recovery measures, advance overall efficiency, and enhance services to students, parents, educators, and support staff.