

Case Studies

Chinook's Edge School Division No. 73

Chinook's Edge began their student record digitization journey with their [plan to clean up student paper files](#). With 42 schools and over 11,000 students they knew that this would be an onerous task for school office staff. Their original plan was to digitize all grade 10 files between March and August of 2019. Then starting in the summer of 2020 they planned to clean all the transfer files and send them to division office for scanning and uploading into PASI. As the work progressed they decided to add additional resources and they came up with a plan to get all of the division's historical student records (K to 10) into PASI by December 2019. They already had two temporary employees in place finishing up the digitization of the division's personnel files. Once the personnel files were done, these employees moved onto sorting and scanning student files. A third temporary employee was added.

Meanwhile, they were working on processes to ensure digitally born documents stayed digital and made their way into PASI.

- For attendance, IPPs and report cards, they built a process where each school generates the reports from PowerSchool and Dossier and then uploaded them into the division's records repository in Laserfiche. Laserfiche workflow would then split the school's PDFs into individual attendance records, IPPs and report cards, add the metadata, and be ready for division office staff to transfer them to PASI student records.
- For registration forms, they implemented an online registration process and demographic update process. If these documents needed to be digital, it was more efficient if they started as digital and stayed digital. For this, they contracted with School Engage. They began by using some pilot schools for kindergarten registrations and then expanded this to the whole division.

Chinook's Edge was in a position to move this project forward quickly. They already had 5 years of experience digitizing other records using the capabilities of their Enterprise Content Management system, Laserfiche.

Elk Island Catholic Separate Regional Division No. 41

In 2013/2014, EICS embarked upon a 20 month process of digitizing our student records.

During this process, we had a team at board office (2 people, approximately 1.5 FTE) who would collect all of a school's records, then would split them into broad categories of document, scan those broad categories in as a single PDF, then save them in Docushare (the tool we were using to hold the records).

Docushare as a tool mimicked the structure of the paper folders it replaced in that all teachers/office staff had access to the records, just as staff used to have physical access to the file room. However, most access was read only, with a separate workflow implemented to enable people to add to the record as needed.

Over the next few years Elk Island Catholic learned a number of lessons including:

1. Initially, documents in a category added to the record at a later time were “bundled in” with existing documents of that category. As people used the records more and more, however, general feedback found that documents were much more useful if they were kept as separate, searchable files instead of bundled together.
2. In the initial rollout, little thought was given towards how to mass archive documents efficiently. Even though Autostore (our filing tool) supported mass archiving, it was after the rollout finished that we started to fully realize the inefficiency of the way we used it for the archive process, and invest time in the workflow changes needed to enable effective mass archiving.
3. When we absorbed a home school program later, and had a full school worth of records to absorb, we tried leveraging part time staff for the scan project (this time directly into PASI as we were migrating to that repository), but were not able to get the same level of perceived efficiency as we had prior. With PASI requiring the identification of more metadata and more split apart records, the process was taking much longer than hoped for.
4. We have instead chosen to try working with an external vendor for this final set of mass scans, which is scheduled to occur during the summer.

Digitizing Student Records can make them smarter:

- PASI contains functionality for performing Quality Assurance, an excellent feature for potentially catching misfiled documents and/or examples of poor practice which could benefit from review
- PASI contains a dashboard, which connects specific documents (IPP's, ESL documents, etc.) with specific codes, and presents a valuable at-a-glance summary of the most valuable information relating to a given student
- PASI has core alerts which appear, identifying when documents for a given student are missing in certain circumstances
- What PASI lacks is detailed, aggregate reporting.

Over several years of digital records management, the most difficult challenge has been identifying when something is NOT present in a record - such as a class of report cards which didn't get uploaded, or a student missing an ISP, etc.

If PowerSchool contains the metadata associated with the digital records and can link directly to documents, it now becomes possible to do things like the following:

- Generate reports identifying which students have certain categories of documents and the issued dates/school year metadata for those documents. (e.g. for a given set of students, identify which ones have a 2019 ISP already uploaded, or have a report card uploaded for the current term, etc.)
- Generate immediate alerts when a student enters the school, similar to what PASI is attempting to do with their student dashboard, but in a way that is proactive.

Overall Value Equation

- The digitization of student records can yield significant cost savings.
- Initial estimated cost of a paper SRP: \$37.50 per student per year.
- Immediate benefits from digitized records: \$6.56 per student (slide 6) and the pedagogical benefits of **instant** access to records.
- Once records are digital, additional benefits upwards of \$14.20 per student can more easily be realized when integrating with other tools.
- The hardest values to estimate are related to the mass audit and workflow capabilities **which are all but impossible with paper records**. The risk mitigation and data aggregation benefits are estimated here as a baseline worth of \$5.00 per student.

[Elk Island Catholic Schools business case for Digital Student Records.](#)

[Elk Island Catholic – PASI Student Record Document Handling Processes](#)

Grande Prairie Catholic Separate School District No. 28

Grande Prairie Catholic Schools has expertise in Microsoft Office software and Adobe so our process uses the programs we use most often. Part of our approach was to treat the ASN the same as a serial number, customer number or invoice number. Some procedures were developed through research while others were adopted from other Jurisdictions. In 2 or 3 separate steps we were able to develop an In-House process and can bulk upload documents or upload individual documents manually if needed.

Our Approach

- Only digitizing current Active student records.
- PASI will be our Digital Student Record System.
- New Registrations as of April 1 2019 are Digital.
- Remaining Student Records will be digitalized before January 2020. Not digitizing last 2 grade levels of the school. Example High School is not digitizing current Grade 11 and 12. Does not include feeder schools.

PART A: Research and Discussion

Digital Record Committee: Committee included input from members across many different departments. Principal, Secretary, Teachers, IT, CST, Administration, Special Education, Early Learning.

Through Committee group discussions and research a list was compiled of all the various document types contained in a Student Record. The documents types were then Categorized accordingly.

PART B: Management of Current Active Physical Student Records.

The Clean-Up: Documents sorted into sections and categories. Staples removed, duplicates removed, scanning metadata report added. A document was provided to schools detailing specific cleanup details.

The Contents of every student record was classified as either **Required** or **Secondary**. A second file was added to the student record for 'Required' documents. When ready to scan this is the file that will be removed and scanned.

Required folder: Contains documents as per Alberta student record regulation
Required documents further separated into 7 sub-categories named:
Documents; Report Cards; SLA/PAT; IPP/IELP/Action Plans; Assessments;
Misc; Suspension/Expulsion

Secondary folder: Other GPCSD internal documents that are not required as per regulation but still have administrative value in our district.

The 'Secondary' Student file will remain at school. Transferred within District only. IF student transfers out of our District the school retains file for one year then shreds.

PART C: Classification of Documents

Every student document is on an upload schedule.

- Uploaded Yearly?: Y/N
- Upload Frequency: During Registration, Yearly, One Time, As Needed.
- Upload Method: Bulk, School Manual, Integrated

Every student document is mapped to a PASI Categories, PASI Document Types and other elements like: Requires date, expiry date or year.

PART D: Uploading to PASI workflow

We are using a combination of different software that work together to create the waybill to bulk upload to PASI. The process allows us to bulk scan multiple students as one entire file that we can bulk upload to PASI.

Software Using:

- PowerSchool Object reports: Student Record category cover sheet
- Adobe Acrobat Pro DC

- Plugin for Adobe Acrobat Pro DC called 'Evermap' that can merge documents and separate with OCR and Zonal
- OCR
- Excel Developer to create metadata and waybill

WORKFLOW

1. Schools print and adds cover sheet to front of each student document category. Report generated by Powerschool object reports.

StateProvinceId: [REDACTED]	FILENAME: [REDACTED].HistDocSchRpt	StateProvinceId: [REDACTED]	FILENAME: [REDACTED].HistDocIden
Legal Name: [REDACTED]		Legal Name: [REDACTED]	
Preferred Name: [REDACTED]		Preferred Name: [REDACTED]	
Grade: 99		Grade: 99	
GPCSD Category: Report Card PreK - 12/ Attendance		GPCSD Category: Documentation	
PASI Category: School Report		PASI Category: Admin	
Document Title: HistoricalReportCards		Document Title: HistoricalIdentificationDocuments	
Document Name: HistoricalSchoolReports		Document Name: Historical Identification Documents	
Document Type: HistDocSchRpt		Document Type: HistDocIden	
ASN: [REDACTED]		ASN: [REDACTED]	
Home Room: SJ-BoscoC		Home Room: SJ-BoscoC	

2. Schools Clean files and separate documents into 2 files. Required or Secondary
3. SCAN: Our scanners have OCR capability. Scan Templates setup.
4. Schools remove the documents in the **Required** folder. Can bulk scan multiple students 500 to 1000 pages at a time. Can create multiple pdf files that can be merged later if needed. The Adobe process later will separate pdf into separate student files. Note: Must scan using OCR
5. Board Office: Using Adobe Plugin 'Evermap' can separate the pdf file into separate student files. PDF is separated based on File name on cover sheet.
6. Create waybill: Use excel to fill in required elements.
 - a. Can copy the file names from window folder and paste in Excel.
 - b. File name can be separated in excel to become the state province id and the document type
 - c. Other columns can be mass filled based on file name.
7. Create the zip file and upload to PASI

Other: To assist with validation we have a log sheet to track what students were scanned and what categories each student should have.



Schools do not re-file the scanned documents, they are boxed and securely stored until scanning validation is done and they are successfully uploaded to PASI. Then they are shredded.

PART E: What is next?

- Vendor Integration: PowerSchool and Intellimedia
- Training for staff requiring access to Digital records. Create extranet accounts

Procedures to Finalize

- Does District still need Notification of Transfer or request for Student Record?
- Can a school still upload documents after student transferred out?
- Working with other vendors to have all documents in electronic form.
- School level process to manage documents for mid year transfers.
- Adobe has built in method to separate files by bookmark. This will work well to bulk upload report cards and other electronic reports.

