



# Paper to PDF

Managing the Transition to a paperless office...and Beyond



# Paperless Office: Pros and Cons

- Saves physical space
- Saves paper
- Saves money
- Handwriting!
- Efficiency
- Nothing gets lost\*
- Overhaul office workflow
- Cost to implement
  - Time and Money
- Change relationship of institution and students to ISSS
- What if the power goes out?



\*

# Making the Decision to go Paperless

More factors to consider:

- Hardware
  - Computers, scanners
- Software
  - All-in-one management system vs. \*ad-hoc\*
  - Access- who in your institution needs to utilize your system
- Server space
  - How much space do you need?
  - How much do you love your IT support staff?
- Institutional Support
  - Academic *and* Admin departments
- Security

# The 2 halves of going paperless

The files you  
already have

The Scanning  
Process

What to  
Preserve

Advisor  
Culture Shock

Archiving

Moving  
Forward

Developing a  
Paperless  
process

File  
Organization

Forms

Outreach

# Scanning your Paper Files

- How should you scan dozens, hundreds, thousands of paper files?
- Scanning in-house vs. 3<sup>rd</sup> Party
  - Is this a job for a student assistant?
  - Budgeting labor vs. cost
  - How many files do you have
  - Timing- Workflow disruption
  - Data security and FERPA

# What to Scan, What to Shred?

- How much is too much?
  - Should you scan everything or clean out files first
- What about files of former students
- Organizing your files pre-scan
  - 1 big pdf per student or divided out
- Maintaining USCIS Compliance



# Archiving your old files

- USG BOR archival policy is 5 years
- Integrating mass of files into institutional archival system
  - Developing a system to access paper archives if necessary
- Electronic file archiving should meet BOR archival requirements
- How to identify archived files to purge after 5 years



# Advisor Culture Shock

- ISSS offices are built around paper
- Buy-In is extremely important
  - Emphasize the benefits
  - Going paperless is a big project! Everyone should have a stake and a voice
- Change can/should be gradual
  - Transition in Stages:
    - E-forms
    - Emails and correspondence
    - Paper File conversion
- Ongoing...

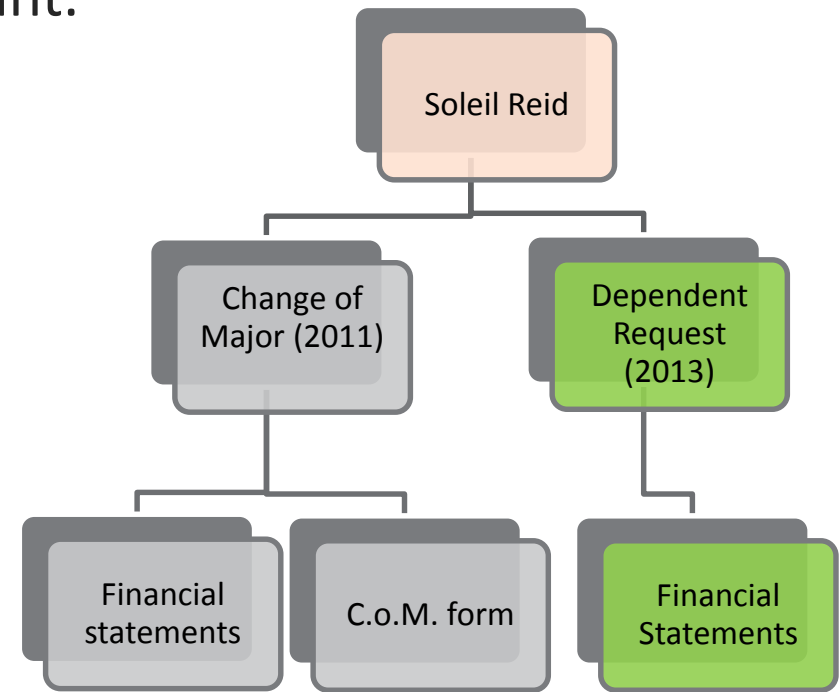
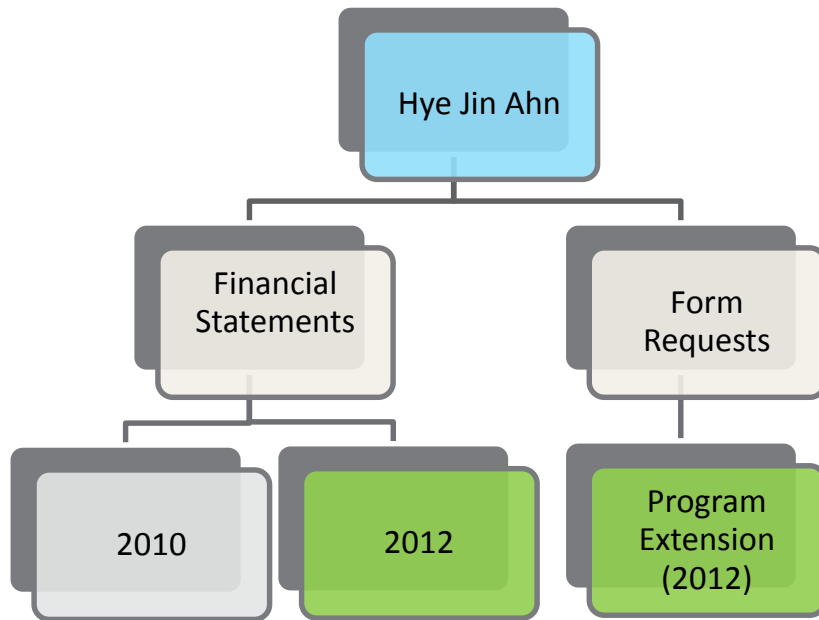


# Developing a paperless process

- Developing a paperless process means considering every way that your office interacts with students
  - Every item that goes into a paper file must be adapted electronically
    - Forms, advising notes/emails, documents, applications, SEVP tickets etc.
  - The challenge vs. the benefit of electronic
    - Developing a coherent and consistent organizational structure for files.
    - Once in place, makes finding items very easy.

# Building your Map (file organization)

- Different ways to organize your files. Planning how to organize consistently is extremely important.



# Educating the Institution

- The paperless office requires ongoing outreach to and feedback from departments
- ISSS reached out to departments before, during, and after going paperless
  - Academic/Admin departments who use ISSS e-forms
  - Admissions and Generating I-20s
- Ultimately, paperless ISSS will make their jobs easier
- Return for feedback after process is implemented

# Students

- Ultimate goal: make students' interaction with ISSS more efficient
- Constantly educating students to new processes and procedures.
- New students vs. Continuing students
- Outreach



# E-Forms

- Necessary for any paperless ISSS office
- More efficient for students and staff
  - Set up forms for departments or students
  - Save trips into the office
- E-forms an option for any size office
  - Create forms with Google or Adobe if you don't have an in-house system
- Ideal 1<sup>st</sup> step in process of going paperless
  - Gradually integrate e-forms into process
  - Even printing finished e-forms for files is more efficient

# Questions?

