

CSU CHANNEL ISLANDS
STRATEGIC INITIATIVES | NON-FUNDED WORK

Student Records Transition to Electronic Filing System

Strategic Initiative and Action

Student Success

- 2.2 Creating clear curricular pathways: Improve timeliness of admissions and enrollment (e.g., implement an E-Transcript reader program).

Project Summary

Historically, the campus has managed student records in physical form. Management of physical records is both time-consuming and requires use of already limited storage space on campus. Furthermore, student records are often used by more than one area on campus. As a result, some areas duplicate record keeping, and/or must coordinate with Enrollment Management to manually access the records.

In direct support of Strategic Initiative 2.2, ITS has partnered with Enrollment Management and external partners to deploy an enterprise electronic document imaging and storage platform. This system facilitates scanning, indexing, storage, retrieval, retention and disposal of student records.

In 2018-19, ITS and Enrollment Management have worked to transition student transcripts to this electronic system (Fileflow). The electronic system serves to increase the security of student records, provide a central electronic location for student records, enable campus staff to access records more efficiently, automate document retention in compliance with University policies, and decrease the amount of physical space on campus currently used to store physical records.

To date, 614,919 student records have been converted to the electronic system, including over 560,000 documents and transcripts previously stored in legacy system (Hershey Singularity). ITS estimates current growth rate at 3,800 documents per month.

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Baseline Data and Associated Goals

| Baseline Data | Associated Goals |
|--|--|
| Number of documents migrated from the Singularity legacy system: 560,320 | Achieve 100% migration of documents from Singularity to <i>CI Fileflow (powered by Hyland Perceptive Content)</i> by <i>December 2018</i> . (*Note: This has been achieved.) |
| Number of documents currently stored in Fileflow: 614,767 (10%) | Increase number of documents stored in Fileflow by 7% or more by June 2020. |
| Number of existing physical transcripts ingested by Fileflow (average per month): 1,258 | Enable growth of physical transcript ingestion by Fileflow software for 3,000 or more per month. |
| Number of transcripts processed by Enrollment Management in Fileflow (6/18-2/19): 11,318 | Increase number of transcripts stored in Fileflow by 2% or more by June 2020. |
| Estimated for transcript verification and manual data entry ranges between 5-20 minutes per transcript, depending on transcript attributes and data. Based on average transcripts per month (1258), between 105 and 419 hours per month for transcript verification & manual data entry. | Reduce hours per month required for transcript verification and manual data entry by 20% by September 2020 (between 21 and 83 hours per month time savings) |

Project Status

Implementing Phase

Project Plan:

- Phase 1, which entailed acquisition and deployment of the new system was completed in August 2018.
- Phase 2, which includes transitioning all existing student transcripts to the electronic system, is expected to be complete in Spring 2019.

Key Leaders and Divisions

| | |
|-------------------------------|---|
| Lead Division | Business and Financial Affairs |
| Collaborating Division | Academic Affairs |
| Action Champion | Jim August, Associate Vice President and CIO, Information Technology Services (ITS) |
| Action Project Leads | Asha Ramachandra, Project and Service Management Specialist, and Ana Rosa Duran, Director of Student Systems. |
| Action Collaborators | Enrollment Management team (Angelika Esser, Kellen Smith), ITS Application Services, ITS Web Services. |