

Form: Assess Your Records Management

How does your school secure, manage and store records? Too many still rely on paper forms, manual record handling and physical storage. That's all slow and costly. When a student needs a transcript, you need to to quickly and securely respond. And school budgets are better spent on the classroom instead of paperwork, right? To learn more about PaperVision.com's time- and money-saving efficiencies, we invite you to fill out this form on your current approach:



Record handling

How does information come to your school?

- Paper – Hand-written forms, correspondence, notes _____% (estimate)
What % do you end up scanning? _____%
- Electronic – email, eForms, electronic file transfers _____% (estimate)



Storage

Where are your student records and other important school information kept?

- Paper Documents/Filing Cabinets. Physical storage space used: _____ sq. ft.
- Electronic Documents/Emails/Computers/Mobile Devices/Flash Drives/Disks/Websites
- Digital Copiers / Printers

How much information is stored:

Network data: _____ terabytes (Available by checking your "used space/free space" in network drive)

Paper documents: _____ pages (Five-drawer filing cabinet holds about 30,000 pages)

How long do you store paper and electronic records?

Student records: _____ years Financial records: _____ years HR/personnel files: _____ years

Teacher notes: _____ years Parent/public correspondence: _____ years

Does your current system allow for automated records retention/destruction? Yes/No



Access

Are you able to classify and index records for easy access and storage? Automatically? Manually?

Are your digital records loaded into an Enterprise Content Management (ECM) system?

- If so, have you set up automated workflows to meet your school's needs?
 - Transcript requests
 - HR onboarding
 - Billing/accounts payable
 - Other: _____



Security

Instances of data breach, theft, or loss? Details: _____

Does your records management strategy meet these basic security requirements?

- Physical Security – Are all of your paper documents, files, flash drives, and back-ups that contain critical personal information locked in a room or file cabinet that is secure?
- Electronic Security – Are your electronically stored documents protected from attacks and breaches with encryption both during transmission and at rest?
- Authentication – Do you restrict user access to information through audit trails and other extensive security settings?
- Disaster Recovery – Is your data secure from theft, loss, natural disaster or cyber attacks?



Regulatory and policy compliance

Which government regulations must your school comply with?

- Family Educational Rights and Privacy Act (FERPA) Sarbanes-Oxley Act (SOX)
- Credit card/payment data security laws Other _____

Need help assessing your records management? Contact us: www.papervision.com