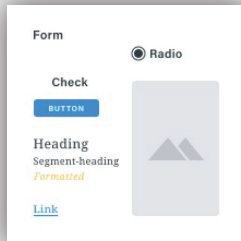


Forms & Workflow Automation

Turn your paper-based forms into digital ones and automate your approvals and processes with our easy to use system. Virtually any paper-based form in use at your district can be digitized and automated!

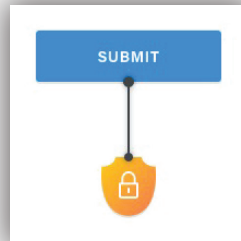


Build Forms & Surveys

Our team will work with your district to digitize and automate your current forms.

Forms can be styled to match your district colors & branding.

Other features include:
Multi-page forms, calculated values and scores using form fields, permission-based account access and more! .

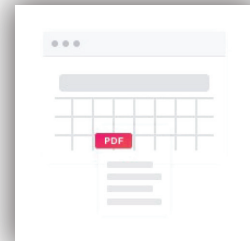


Get Responses

All forms are rendered in a responsive UI, so that they appear properly on all devices including tablet and mobile devices.

Form submissions are secured with industry leading security standards. Multiple forms can be linked together with workflow logic,

You can also allow for partial responses with our Save & Return feature.



Use Your Results

Once a form has been submitted, an email notification is sent to keep your district staff informed.

Data can be exported in a variety of formats for import into other systems, PDFs, displayed visually in graphs and tables.

Submission data can be integrated with your existing tools including Box, Dropbox, Google Drive, Google Sheets, and Microsoft OneDrive.

HEAR WHAT OUR CLIENTS HAVE TO SAY:

"SchoolSource Technologies' Forms & Workflow Automation has helped our district move toward a paperless environment - streamlining our forms approval process by allowing digital signatures and workflow for many of our forms. The tools are simple, easy to use, and their customer support has been excellent."

- Don Heberer, District Administrator for Instructional Technology
Comsewogue School District

"SchoolSource has helped us streamline our registration process and is allowing us to automate otherwise time consuming paper forms."

- Reanna Fulton, Director of Technology
West Islip Public Schools



info@schoolsourcetech.com



www.schoolsourcetech.com



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Forms & Workflow Automation

SST Forms Automation & Workflow Solutions Education Use Cases

The categories below are a few use case scenarios where our solutions have enabled and automated the data input and collection process in lieu of traditional paper forms

Our solutions track the notification and approval processing requirements, provide a comprehensive auditable report, dashboard capabilities for compliance, and overall improvement towards processing efficiencies.

These common use case scenarios have been identified and successfully implemented by our clients. The items on this list have been carefully selected to provide quick and timely implementation deliverables and providing visibly impactful solutions to the administration of the district and the community.

- Grade Change Request (GA)
- Time-off Request (HR)
- Request for CTLE Training (HR)
- Budget Transfer Funds Request (GA)
- Change of Name, Change of Address (HR)
- Covid Attestation Compliance (GA)
- Transportation Request – Moves, Adds, etc.
- Private School Transportation Form (GA)
- Remote Learning Technology Request (GA)
- Building Use Request (GA)
- Facilities Management (GA)
- Tech Support Request (T)
- Supply Purchase Request (GA)
- Standardized Exam Registration (GA)
- Fundraising Request (GA)
- Conference/Travel Request (GA)
- Website Change/Update Request (T)
- Employee Change of Status (HR)
- ID Badge New or Replacement Request (HR)
- Overtime Approval (GA)
- Access to Applications Request (T)
- New Hire Request (HR)
- Custom Surveys & Questionnaires (GA)
- Parking Request – Staff and Students (GA)
- Sports and Athletic Consent Form (GA)
- Parent Release Form (GA)
- Purchase Order Request (GA)
- Tuition Reimbursement Form (GA)
- Incident Reporting Form (GA)
- Wi-Fi Request Form (T)
- Volunteer Form (GA)
- Employee Exit Form (GA)

Key: GA – General Administration, HR – Human Resources. T - Technology

Additional implementing for more complex use case scenarios listed below. These use case scenarios require more complex processing requirements and notification workflows and have been successfully implemented in current districts.

- Kindergarten/Student Registration
- Employee Staff – Applications
- Employee Staff – On & Off-Boarding
- Ed Law 2D / Contractor Compliance
- IEP Form
- Employee Evaluations

Please inquire if you have other use case scenarios you would like to identify and explore with us.



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