



# How Cypress Fairbanks ISD Implemented 90% Paperless Employee Onboarding

*Laserfiche Solution Contributed By: John Crumbley, Director of Information Services and Applications, Dava Clark, Programmer/Analyst and Eric May, Assistant Director of Information Services and Applications, Cypress Fairbanks ISD*

Cypress Fairbanks Independent School District (Cy-Fair) is the third largest district in Texas and the 22<sup>nd</sup> largest in the nation. Spanning 186 square miles and including 115,000 students across 86 campuses, the district employs 17,000 active employees, onboarding around 3,900 employees annually. Of those, 1,500 are onboarded in the period between June and August.

In the past, each new employee spent approximately thirty minutes filling out an onboarding packet that contained at least 27 pages. Many of the forms requested duplicate information. The new employee brought these documents to a contract signing session and the HR team collected them in a folder to be manually scanned into Laserfiche. Some of the pages had to be pulled out of each packet and walked over to payroll, where they were stored filed away in filing cabinets. In total, the whole process took 40 minutes per employee.

The district worked with its reseller, JPI Data Resource, to transition to Laserfiche Forms and Workflow in order to increase efficiency and eliminate paper. For new employees, the time to fill out paperwork has decreased 83%—from half an hour to five minutes. For Cy-Fair staff, the new automated onboarding process is 93% paperless and four times faster than the manual process.

## Laserfiche Forms

Before the first day at work, a new employee is sent a link to the onboarding form along with an assigned employee ID. Once the employee enters the employee ID and Social Security number into the form, much of the information is prepopulated by a look up into the employee database. The employee can change any incorrect information and fill in any missing information.

**CFISD** | **FOR ALL**  
**OPPORTUNITY IS HERE.**

### Welcome to the CFISD Family

Welcome to Cypress-Fairbanks Independent School District!! CFISD's mission is to "maximize every student's potential through rigorous and relevant learning experiences to prepare them to be 21<sup>st</sup> Century global leaders." Our employees are committed to students' success, both within the educational environment and beyond. CFISD students graduate to become effective communicators, competent problem solvers, self-directed learners and responsible citizens.

Thank you and congratulations on your employment with CFISD!

Employee Info Ethnicity CFISD Relationship Release Info TRS Info  
Payroll Info W-4 Info SSN Statement Houston Chronicle Handbook  
Final Agreement FAQ

#### CFISD New Employee Information

Employee Number \* Required (no leading zeros)

SSN \* Include dashes (xxx-xx-xxxx)

Enter your employee number (provided in the email from HR) and your social security number. If the fields below do not auto-populate, please make sure that your employee number and social security number are entered correctly.

Last Name  
First Name  
Middle  
Date of Birth  
Gender \*  Male  Female  
Marital Status \*  Single

*New employees fill out the onboarding packet in Laserfiche Forms*

The onboarding form is divided into different pages, with each page corresponding to a different document. The pages are dynamically displayed and vary according to the employee's position. For example, a new employee in nutrition services must certify that they have a food handler's license, whereas a new employee in transportation must upload a copy of a driver's license.

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**W-4 Information**

Personal information will be gathered from your records. Please make sure the 'Employee Info' tab has the correct information.

**Employee's Withholding Allowance Certificate** (Form W-4, 2017)

1 Home address (number and street or rural route) | 2 City or town, state, and ZIP code  
3  Single  Married  Married, but at a higher Single rate  
4 Total number of allowances you are claiming from line 4b above or from the applicable worksheet on page 2  
5 Additional amount, if any, you want withheld from each paycheck  
6 Your total income differs from that shown on your most recent pay stub  
7 I claim exemption from withholding for 2017, and I certify that I meet both of the following conditions for exemption:  
8 I can prove a right to a refund of all federal income tax withheld because I have no tax liability, and  
9 This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.  
If you meet both conditions, write "Exempt" here.  
10 Under penalty of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.  
Employee's signature | Date  
11 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS) | 12 Office use (optional) | 13 Employer identification number (EIN)  
For Privacy Act and Paperwork Reduction Act Notice, see page 2. Use No. 105050 Form W-4 2017

Please complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Click IRS W-4 for detailed information and directions to complete the W-4 process. The form from the link above is for your information. This does not have to be completed and is only to aid you in completing the required fields below.

Box 3 \*  Single  
 Married  
 Married, but at a higher Single rate

Box 4 \* (7)

Box 6 \$ 0.00

Box 7

Previous: Direct Deposit/Payroll Debit | Next: SSN Statement

The onboarding form is divided into tabs, with each corresponding to a different document type

One tab of the form is devoted to a list of frequently asked questions.

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**Frequently Asked Questions**

I have previous teaching experience. What will Cypress-Fairbanks need to assure that my salary reflects this experience?  
If an individual has previous experience in an accredited public or private school, an original, official service record will be required. Salary credit for experience earned in Texas, or at out-of-state institutions, will not be granted until the original service records are received and verified. You will need to contact your previous district to obtain an official service record. Service Record Request Packets can be obtained at <http://www.cfisd.net/en/staff/service-record-info>.

I have attended more than one College/University, must I provide transcripts from each institution?  
Yes, however, the transcript from the institution awarding your degree, bearing the seal of the college, signature of the registrar, and showing degree conferred is the only required document, all others may be photocopies. This original does not need to be in a sealed envelope from the University, however, it must be an original on the original university's paper.

Will Cypress-Fairbanks accept an electronic transcript?  
Some Colleges/Universities are providing transcripts through an electronic clearinghouse. In order to be an acceptable electronic transcript, you must provide the university with an email address of a HR personnel member. HR personnel, such as the Assistant Director assigned to you, must receive and open this transcript. You cannot have it sent to your email address and then forwarded to CFISD.

Do I need to have my official service records and transcripts at the time I sign a contract?  
No, you will have 45 days after your first date of employment to submit the original transcript to HR. If you have them in time for your session, please bring them at that time.  
Original service records will be received up to May 1st of the current school year for consideration of additions to the current year's salary. Records received after that date will be considered for additions to the next school year.

It is your responsibility to request your service records from previous districts, and then submit the original to CFISD. Remember: salary credit for experience in state or out of state, will not be granted until original service records are verified.

How often will I get paid?  
Contract employees are paid on a semi-monthly basis on the 15th and last working day of each month over a 12 month period. Exceptions to these dates are made for holidays and weekends, which require deposits to be dated earlier. Your salary will equally be divided over the twenty-four paychecks. Employees will receive their first paycheck on September 15th and continue until the last working day of August.

What should I do if I cannot upload a copy of a voided check or a direct deposit letter from my banking institution if I selected to be paid by direct deposit?

Frequently asked questions are accessible directly from one of the tabs in the form

If an employee attempts to submit the form without filling out all required fields, he will get a series of error messages indicating which questions still need to be answered.

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Payroll Info    W-4 Info    SSN Statement    Houston Chronicle    Handbook  
Final Agreement    FAQ

**Final Agreement**

By completing and submitting this electronic New Employee Information, I acknowledge notification of and agree with the authorizations and representations within. I hereby certify that the information is accurate, truthful, and complete. The parties agree that this agreement may be electronically signed, and that my signature will be affixed to each and all pages of this New Employee Information. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

Signature \*   
*Please type your full legal name.*

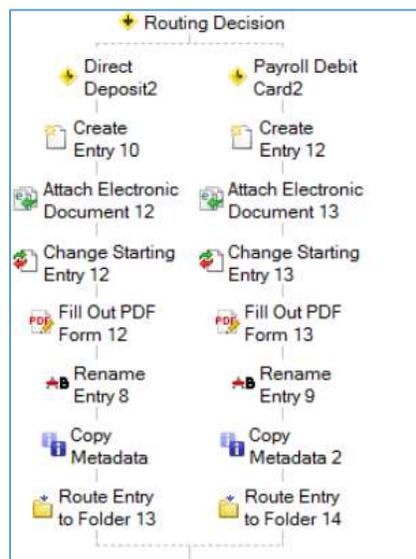
Date      Date captured on form submission

You have not completed all required fields on the Employee Info tab.  
You have not completed "Part I" on the Ethnicity tab.  
You have not completed "Part II" on the Ethnicity tab.  
You have not completed all required fields on the Release Info tab.  
You have not completed all required fields on the TRS Info tab.  
You have not completed all required fields on the Payroll Info tab.  
You have not completed all required fields on the W-4 Info tab.  
You have not completed all required fields on the SSN Statement tab.  
You have not completed all required fields on the Houston Chronicle tab.  
You have not completed all required fields on the Handbook tab.

Previous: Handbook    **Submit**

*All required fields must be filled out before the form can be submitted*

Once the form is submitted, Laserfiche Workflow uses the provided information to fill out multiple PDF documents.



*The section of the workflow that populates various PDF documents related to payroll*

The electronic documents exactly mirror the previously used paper forms, ensuring that HR and payroll employees are familiar with the formatting.

CFISD EMPLOYEE INFORMATION SHEET					Revised 10/2016	
Full Name (Legal name)		Social Security Number	Date of Birth	Gender	Marital Status	
Doe John B		123-45-6789	01/01/1991	<input checked="" type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Single <input checked="" type="radio"/> Married	
Last First Middle						
12345 Apple Lane		Houston TX	77777	Home Phone Number 123-456-7890		
Street Address		City	State	Zip	Cell Phone Number 987-654-3210	
<p>The United States Department of Education (USDE) requires all state and local education institutions to collect data on ethnicity and race for students and staff. This information is used for state and federal accountability reporting as well as for reporting to the Office of Civil Rights (OCR) and the Equal Employment Opportunity Commission (EEOC). <i>Please complete Part I and Part II.</i></p> <p>School district staff and parents or guardians of students enrolling in school are requested to provide this information. If you decline to provide this information, please be aware that USDE requires school districts to use observer identification as a last resort for collecting the data for federal reporting.</p>						
Part I – Ethnicity (Choose Only One)			Part II – Race (Choose One or More)			
<input type="radio"/> Hispanic/Latino (A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race)			<input checked="" type="checkbox"/> American Indian or Alaska Native (A person having origins in any of the original peoples of North and South America (including Central America), and who maintains a tribal affiliation or community attachment)			
<input checked="" type="radio"/> Not Hispanic/Latino			<input checked="" type="checkbox"/> Asian (A person having origins in any of the original peoples of the Far East, Southeast Asia or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam)			
			<input checked="" type="checkbox"/> Black or African American (A person having origins in any of the black racial groups of Africa)			
			<input checked="" type="checkbox"/> Native Hawaiian or Other Pacific Islander (A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands)			
			<input checked="" type="checkbox"/> White (All persons having origins in any of the original peoples of Europe, the Middle East, or North Africa)			
<p>If you are related to a Cypress-Fairbanks ISD employee by blood or marriage, please list the name and relationship.</p>						
1. Jane Doe		Spouse		Teacher		
Name		Relationship		Relative's Position in District		
2.						
Name		Relationship		Relative's Position in District		
<p><b>NON-DISCLOSURE STATEMENT:</b> An employee has the right to withhold his/her home address, home telephone number, emergency contact information, or social security number, or whether the person has family members from public access as provided in Government Code §552.004. By checking the appropriate box and signing below, your personnel records will be "tagged" appropriately in the District's central computer system to honor your preference when a Texas Public Information Act request is received.</p> <p>A CFISD Employee Directory will be printed listing your name, work location, and work telephone number, and with your permission, we will include your home address and home telephone number. If you do not want your home address and home telephone number to appear in the Employee Directory, you must indicate "Withhold" in the boxes below. If you check "Release," the home information will appear in the Employee Directory and also will be released in response to any requests under the Texas Public Information Act.</p> <p>Please indicate by checking one of the boxes below your preference for withholding/releasing information requested under the Texas Public Information Act and for the CFISD Employee Directory. We must have this section completed to honor your preference.</p>						
Home Address: <input checked="" type="radio"/> Withhold <input type="radio"/> Release		Home Phone: <input checked="" type="radio"/> Withhold <input type="radio"/> Release		Family Member status: <input checked="" type="radio"/> Withhold <input type="radio"/> Release		
Cell Phone: <input checked="" type="radio"/> Withhold <input type="radio"/> Release		Personal Email Release: <input checked="" type="radio"/> Withhold <input type="radio"/> Release				
John Doe			7/25/2017			
Signature			Date			

One of the PDF documents filled out by Workflow

Workflow notifies the HR department of any new documents that need to be reviewed to ensure that they are filled out correctly. The HR representative then invites the employee to a contract signing session to sign the I9 form – the only form that has not yet been converted to an electronic form. Once the employee signs the form, the HR department updates the value of a metadata field which routes the documents to the employee's folder in Laserfiche.

An employment contract is generated by a third party contract application, and once signed electronically, is archived directly in Laserfiche alongside the employee's other documents. The payroll department also receives a notification with a link to any documents that the department may need to process, such as the W4 form. Once the forms are processed, an employee fills out the appropriate metadata field to archive them.

Template: Human Resources

Employee ID  
11111

Initial of Last Name

Document Type

Last Name  
Doe

First Name  
John

Social Security  
999-99-9999

Document ID

Dept.

Pay Date  
/ /

Completed By: (Payroll)

Completed Date  
/ /

Add/Remove Fields ...

*The metadata template applied to all HR documents*

## Benefits of Laserfiche

Automating the new employee onboarding process with Laserfiche has resulted in the following benefits for Cy-Fair:

- The time to fill out new-hire paperwork has decreased from half an hour to five minutes.
- The process of sorting the paperwork, scanning it, separating it and walking it to payroll has been decreased from 40 minutes down to five minutes.
- Paper use has been reduced by 93%, and the district hopes to eliminate paper completely once the I9 process is automated.

### Next Steps:

Contact JPI Data Resource for your FREE DEMO!

*JPI Data Resource*

*Jim Bergeron, President*

*1-888-581-8560 x 210*

*jimb@jpidr.com*



**Laserfiche**<sup>®</sup>  
*Solution Provider*