

ADOBE SIGN AND FIELD-TRIP WAIVERS: ELIMINATING PAPER FORMS TO ENHANCE EFFICIENCY

FOCUS ON EFFICIENCY

An inter-departmental partnership at Sonoma State University planned and launched a pilot project allowing for electronically issued, signed and submitted waiver forms for student travel. This initiative resulted in both an exemplary savings in time and reduction in the use of paper

In fall of 2018, the Sonoma State University biology and chemistry departments brought forth a problem that had plagued them for some time. In both departments, students travel to off-site locations for field work or to present scholarly research. The process of getting waivers signed by students was extremely time-consuming and paper-intensive.

A partnership between the School of Science and Technology, the Provost’s Office and IT resulted in a pilot program designed to move this waiver process to electronic submission.

Using Adobe Sign and PeopleSoft software programs, the team’s new process allows pre-populated forms to be sent to each student in a selected class, signed electronically, returned to the department and stored securely in OnBase, a content-management software platform.

The pilot program’s impact is substantial: More than 250 electronically issued and signed waivers were submitted in spring 2019, and the entire cycle-time of a submission decreased from days or weeks to minutes.

In the planning stages, there were hurdles to overcome, including gaining approval from the Office of General Counsel to use electronic signatures for liability waivers. The next step was attaining approval for departmental staff to pull student information for personalization of the waivers, which ensures accurate and consistent submissions.

Moving forward, this pilot will scale to include all campus schools and departments.

MILESTONES

Aug
2018

- Initial project meeting held and kick-off commences.

Oct
2018

- Forms are imported to Adobe Sign.
- PeopleSoft query is written to Adobe Sign/ Mega Sign specifications.

Nov
2018

- Small/ limited pilot is conducted in one class.

Feb
2019

- Extensive pilot is conducted in one class.

QUANTIFICATION AND RESULTS

In spring of 2019, this process was completed with five separate classes in the biology department, which resulted in more than 150 separate waivers submitted to the department. Assuming a minimum of five pages for each set, the new process saved 750 pieces of paper and a significant amount of time.

Rather than waiting for students to sign and deliver forms to either the faculty or the administrative office, the forms are completed via electronic acknowledgment and delivered within seconds of completion.

OnBase allows secure digital storage without additional physical storage requirements. This is a benefit both to the university's bottom line and supports the university's strategic goal of improving campus sustainability.

IMPACT AND BENEFITS

According to students, faculty and staff, this improved process is a benefit to them, both in time savings and ease of use.

Scaling this process campuswide would provide exceptional savings of both time and reduction in use of paper.

LESSONS LEARNED

It is necessary to consider the specific timing of academic processes when scheduling the pilot program: This project focused on the field-trip waivers that are typically signed at the beginning of each semester. One of the issues recognized part-way through the project was that a pilot process has to be tested at a very specific point at the beginning of either the fall or spring semester to ensure maximum value. The schedule was adjusted on the fly to capture the majority of forms.

PROJECT TEAM

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