

ELECTRONIC RECORDS & AUTOMATION REVIEW



Colleges and universities are racing toward a paperless records future—and are experiencing growing pains as they attempt to manage their school’s evolving technology needs. Embracing electronic data exchange, including eTranscripts, and automating records processes can help institutions be technically agile, adaptable and responsive to the needs of students, faculty, staff and the public.

An **Electronic Records and Automation Review** examines gaps in technology and makes recommendations on how to move toward a fully electronic, automated process for managing records. This includes a review of how electronic records are acquired (the data), maintained and stored, and often how (or if) records can be accessed (by students, by campus constituents, permission levels, etc.). If data/records exist in paper copies or records are not electronic, imaging processes or processes to ensure an efficient transfer to automation can

also be reviewed. This may or may not include a review of the type of technology (system or software) being used for these processes.

eTranscripts

Nearly every aspect of registration, administration and attendance is completed almost entirely online. Exchanging electronic student records is one of the few areas with a remarkably low rate of adoption, despite demonstrated cost savings. A 2014 survey report by AACRAO, the National Association of College and University Business Officers (NACUBO), and Parchment, Inc., offered these recommendations for schools:

- Conduct a cost analysis to make business case for either adopting or increasing the use of eTranscripts
- If applicable, examine the reason for the continued predominance of paper transcripts, and seek solutions for reducing the volume of paper transcripts

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- Seek agreements with transfer partner institutions to implement an eTranscript solution that helps reduce the percentage of paper transcripts
- Fully implement all available technology to support transcript data processing automation for admissions decisions/processing, transfer articulation, and, if applicable, scholarship processing
- Those who are not using technology efficiently to manage academic records
- Those failing to timely respond to student requests for their records, status and information

What is the intended outcome?

The college or university works with AACRAO Consulting to fully implement electronic transcripts, both incoming and outgoing, and to outline processes and timelines to automate records functions, such as petitions, graduation applications and transfer credit review. These records then can be used from acceptance to articulation, and sent in request from employers and other institutions. The school becomes more responsive to the needs of students and operates more cost effectively.

Which schools can benefit from an Electronic Records and Automation review?

- Those who wish to fully implement electronic transcripts
- Those with outdated records management policies and procedures
- Institutions in areas where secondary or post-secondary systems are adopting eTranscript standards
- Institutional personnel who seek to prepare the institution for the future, including:
 - Registrar
 - Admissions Director
 - Chief Enrollment Management Officer
 - Chief Academic Officer/Provost
 - Chief Student Affairs Officer
 - Chief Information Technology Officer