2.7: Best Practices When Converting to a Paperless Data System

Converting to a paperless data system can increase efficiency and productivity. However, converting to paperless data collection can also be complex. Here is a list of various approaches and steps to take to help ensure a successful conversion to a paperless operation.

Get Buy-In

Staff and team members who are long-time users of the previous system often have a large knowledge investment in the old one and may not be receptive to change. It is crucial to ensure everyone who is involved in the conversion fully understands the benefits and necessary steps. Developing a one-page summary of the benefits (include projected program cost, time savings, and talking points for leadership) is helpful. Helping the staff understand why a change is being made increases their willingness to embrace a new system.

Provide Training/Education

Workers not properly trained on using a new paperless data collection system also experience frustration resulting in falling back to previous data collection methods—such as pen and paper—or not correctly entering all the data into the new system. Making sure everyone is trained and educated can help mitigate these issues.

Take your Time

Converting forms and scanning old documents can be time-consuming. Moving too quickly causes some documents to be missed or errors to be made while creating forms, resulting in repeating parts of the process. Employees may also have difficulty adapting to a new interface. Allowing adequate time for hands-on experience with the new system, coaching, and repetition until the staff are comfortable contributes to success.

Backups

Many organizations, long dependent on paper systems, don't fully understand the need for electronic backups, and therefore don't take adequate precautions to protect newly converted data. Likewise, organizations are often quick to discard printed archives for additional space once they have been

scanned or stored electronically. Either problem can result in data loss. MAKE SURE there is reliable backup for all data stored in the new paperless system.

Data Security

Stored paper data might contain private or confidential material that must be secured. This is often overlooked in THE paperless conversion processes. Data must be secured in the printed format and during the conversion process. Likewise, electronic fields and storage must take into account necessary security for private or confidential data.

Planning

A smooth conversion process requires planning to avoid bottlenecks. If multiple types of archived print materials are to be converted, the planning determines which documents are converted, in what order, and what resources are necessary for each step. The availability of employees, hardware, and space should be included in conversion planning. Don't be afraid to overestimate the time required!

Downtime/Work Stoppages

Unless you have done careful preparation, paperless conversions can result in work stoppages. Initial planning considers any current system and staff who will remain active in day-to-day operations during the conversion. This list should be compared to the resources needed for the conversion.

Avoid Over Conversion

Some archived print data does not require conversion to the electronic format. Organizations have spent considerable time and money converting documents that will rarely be accessed and free up little space. Also, documents scheduled for destruction in the near future don't require electronic storage. Deciding which data elements have to be converted early in the process is important.

Define the Goals

Creating a detailed definition of the end goals helps to focus the project. What do you want from a paperless office or a paperless data collection system? Ask yourself, what are you trying to achieve?

Create a Detailed Timeline

A timeline for the conversion process and for identifying most frequently used forms should be created. Begin by converting and testing the least used forms to make the initial impact small. This is often less burdensome for users.

Identify the Correct Tools and Resources Before Starting

A conversion to a paperless data system will usually involve several different tools. For example, scanning and optical character recognition software may be used for both archiving old paper documents and creating forms. Security certificates and e-signature tools might be used for forms requiring signatures. Likewise, you should identify team members with expertise on specific areas of data collection.