How hundreds of NYCDOE schools, from across all five boroughs, embraced digital operations software to automate registration and onboarding processes for incoming students — during a pandemic and beyond.

Group Case Study
Digitizing Blue Cards, Registration and Onboarding across New York City Schools

Estimates indicate that NYCDOE schools spend a staggering $84 million on the administrative costs associated with processing just the paper-based elements of student registration each year. That's an average of $45,017 per school. And, that's just the tip of a very expensive iceberg. There's then the costs derived from chasing parents for information, communicating with pre-registered families, onboarding new and returning students, manual data entry and more.

When COVID-19 hit the NYCDOE school system, manual methods of registering and onboarding students became overly time-consuming for schools and complex for parents. Hear how schools from each borough transformed slow and resource-intensive new year processes, saving time, money and completing a traditionally people and paper-based exercise 100 percent digitally.

The Challenge
Running on paper and running out of options

Despite being in the midst of the digital age, most NYCDOE schools manage student registration and onboarding the hard way — with people and pens. These manual processes rely on the physical distribution and collection of many paper documents and forms — from Emergency Contact Blue Cards, Media Consent Forms, Student Handbooks, Cell Phone Contracts, and Permission to Walk Home Forms; to Proof of Immunization, Home Language Identification Surveys, Kindergarten Admit Questionnaires, Housing Questionnaires, ATS Registration Forms and more.

The manual nature of traditional registration and onboarding processes creates a huge workload at NYCDOE schools; particularly when preparing for each new school year. Whilst these human-reliant tasks lead to avoidable inefficiencies, needless repetition and inconsistent record keeping, many schools were reluctant to change the status quo. When COVID-19 struck, community safety and the NYCDOE dictated that the entire process be digitized to ensure contact-free interaction. For many schools, this was the push they needed to embark upon a long-pondered journey.

"All new admits and enrollments, such as Kindergarten registrations, were done via pen and paper — it was very time-consuming," said Ellen O'brien, Principal at PS 19 (Judith K. Weiss School, The Bronx). "When I became Principal in 2019, one of my key initiatives was to become paperless.

"Our old paper-based system for managing student registration and onboarding involved too many people and too much double-handling of data. For example, each classroom teacher had to keep a running list of which students they had updated Blue Cards from and those who they didn't. That manual and repetitive process led to another, where staff members from the school office would then verify the information again, before manually inputting the data into ATS. COVID was the big push we needed to take the plunge."

" We were totally paper-based — it was archaic "

echoed Sandy Larivee, ENL Coordinator at PS 100 (Isaac Clason, The Bronx). "Every September, we'd send home over 570 physical Blue Cards; one for every student. The kids would lose their Blue Cards, we'd chase them, then eventually re-issue a new document for completion. The pandemic made us realize that we really needed to go digital."

The COVID push:
From inefficient to unmanageable

Dorothy Handler-Velazquez, School Secretary at PS 50 (Talfourd Lawn Elementary School, Queens), and Pamela Rosenberg, Parent Coordinator at PS 107 (John W. Kimball, Brooklyn), said that the usual paper-based slog went from impractical to near impossible amidst COVID-19.

"When it came to new enrollments during in-person registration, it was a hectic one-on-one process," said Handler-Velazquez. "We had up to 50 parents coming up to the school to register new students on any given day — even if they didn't have an appointment. Some parents would have to revisit the school three or four times because they had missing documents, or had forgotten something they required to complete the process, such as Proof of Immunization.

"Then, there's a bunch of additional information that needs to be gathered for certain subsets of students, which was collected face-to-face too," said Handler-Velazquez. "For example, our English as a New Language [ENL] kids need to complete and submit an English proficiency test.

"When the virus really took-off, we suddenly needed a system that would enable us to complete all elements of the usual registration process online."

"Each year, parents usually complete a seemingly endless number of paper forms," added Rosenberg. "I help with Kindergarten registration every year, which normally takes place in the Spring and continues right through the Summer as new families move into the area. The amount of information we need to obtain and collate is stunning — especially for our littlest kids: Can incoming students button their own shirt, tie their own shoe laces, or go to the toilet unassisted? The list goes on and on.

"Because of the understandable concerns and lockdown restrictions accompanying COVID-19, we were approaching the end of the usual registration period without a single registration! It became clear that we needed a solution that could enable families to complete everything virtually, while allowing school staff to manage the process remotely."

Before implementing Operoo, PS 130 (Hernando De Soto in Manhattan) — like many other schools — faced the prospect of conducting manual registration remotely, without the benefit of face-to-face interaction or a purpose-built digital solution.

"Everything was still paper, manual translations and backpack letters," said PS 130 School Secretary, Marlene Ellis. "We usually started preparing physical forms, registration and onboarding packets from February. All parents had to come into the school building to complete and submit documentation.

"Without Operoo, the only workaround would have been to email all parents of incoming students, send out packets via snail mail, explain the process and chase-up everyone via phone, then manually collate and enter the information received. I would have had to repeat this over 200 times."

Lisa Calabrese, Parent Coordinator at PS 9 (Naples Street Elementary School, Staten Island), put it simply:

"
Without Operoo, I don't know how we would have completed registration and kept our sanity
"

she said. "It would have been impossible. We weren't even allowed in the building! Thank goodness for Operoo."

The Solution
Digitizing registration, onboarding and embracing automation

Meeting otherwise impossible deadlines and COVID-safe requirements

Above all else, digitizing the distribution and collection of documents and forms empowered these schools to meet registration and onboarding deadlines as well as NYCDOE mandates for a contact-free process.

"During the pandemic, we wanted to eliminate any risk for our school staff and families," said Larivee (PS 100, The Bronx). "I'm so grateful that the team at Operoo gave us the digital platform to make this possible. The ability to complete all registration and onboarding requirements electronically — from Proof of Address and Housing Questionnaires, to Proof of Immunization and Opt-Out Forms — was paramount to allaying pandemic-related concerns from our parent community. And, on the other side of the fence, school staff don't have to put themselves at risk. Both our parents and staff are very grateful.

"
Operoo gives parents the option to stay home and be safe, while enabling us to meet our DOE obligations. It's been a blessing.
"

Streamlining processes with cloud-based technology

Additionally, automating many aspects of the traditional registration and onboarding process enabled Operoo schools to reduce strain on staff, parents and resources into the future — beyond COVID-19.

"The overall registration process is so much quicker and easier now," said Calabrese (PS 9, Staten Island). "Before Operoo, we'd send all our new year registration and onboarding forms home with students. We'd wait, chase, wait some more, then manually check-off and cross reference all paper forms as they trickled in. Now we have total visibility, with all documents distributed and collected via the one web-based system. Parents complete everything so much faster too."

"You can easily go back and forth with parents online and allow them to submit documents one-by-one at their convenience," said Rosenberg (PS 107, Brooklyn). "Nobody has to come into school. We used to have people cramming into the office for months to fill-in stacks of paper forms on-the-spot. It was a real headache.

> *We're not putting that genie back in the bottle. We'll always do this online from now on.*

Building a single, accessible source of truth

Beyond the contact-free demands of COVID-19, Operoo schools highlighted the ability to track and access a single source of truth as a vital improvement when shifting registration and onboarding processes to a centralized web-based system.

"For the first time, we had one complete 360-view of all information submitted on behalf of each student during registration and onboarding," said Rosenberg (PS 107, Brooklyn). "The ability to centrally collect and analyze data by form type was amazing. Simply put, being able to share a single accessible version of the truth with all authorized personnel — from the classroom teacher to the school nurse — was a game changer, eliminating significant duplication of efforts and information."

Dorothy Handler-Velazquez (PS 50, Queens) said the ability to monitor submitted registration and onboarding information in real-time was particularly beneficial.

"Because we're now distributing and collecting all data from one web-based platform, we have the ability to track returned forms and monitor progress — which I love," said Handler-Velazquez. "I can call-up specific parents if they look like they're stuck and help them finish certain forms. I also love the date-stamped submissions for all forms, which keeps us on track and holds our parents to account.

> *I'm on Operoo all day, every day. It's a godsend!*

O'brien (PS 19, The Bronx) added that Operoo also provided a source of data to verify records in other systems against, in conjunction with ensuring all information captured was corroborated by students' parents.

"One of the pluses of Operoo is that it picks-up inaccurate data in other systems, such as custodial rights," said O'brien. "School office staff don't input custodial rights information, but we are required to fix any errors we identify in the DOE's ATS system. Thanks to Operoo, it's now on the parents to certify that that information is accurate before submitting it, which saves lots of retrospective phone calls."

Digital Blue Cards central to a successful solution

In terms of specific form types, many Operoo schools cited the ability to digitize — and give universal access to — student Blue Cards as particularly important.

"Blue Cards were the first document we started with in Operoo because all new students and incoming fifth graders have to submit an updated version," said Renny Fong, Principal at PS 130 (Hernando De Soto, Manhattan). "Digitizing our Blue Cards made it easier to collect more accurate information in less time, update records without having to request a new card from parents, while ensuring teachers could access their student's Blue Cards anywhere, anytime."

"The fact that I, the Pupil Accounting Secretary and classroom teachers can instantly access, sort, filter or print Blue Cards for all students in our care is really important," said Calabrese (PS 9, Staten Island). "Whether working from home or in the school building, we can access one reliable source of data straight from our smartphones via the Operoo mobile app.

> *With the benefit of hindsight, trying to keep separate stacks of physical Blue Cards up-to-date was nuts!*

Features: Smart Groups, mobile access, automated translation, form templates and PDF Mapping

In terms of features, Operoo's Smart Groups enable NYCDOE schools to tailor communications and requests for information to specific subsets of incoming and returning students.

"With Smart Groups, it's easy to target certain types of students during the registration and onboarding process," said Fong (PS 130, Manhattan). "We no longer have to send messages to the whole school population, which are irrelevant to many recipients. For example, we can send Middle School Application Forms and information just to our fifth graders. Similarly, we're able to create Smart Groups for incoming Pre-K, Kindergarten and immigrant families, associating particular forms or communications to each group."

"You can get quite granular too, building groups based on any data attributes you have available," said Handler-Velazquez (PS 50, Queens). "So, when it came to notifying interested families about our Kindergarten registration process, I separated our current Pre-K students and outside applicants into two different groups because our existing children receive preference over new enrollments. It's just so easy to organize through Operoo.

"Likewise, identifying and providing existing records to students — who are transferring to other schools — is now so simple."

> " With Operoo's Smart Groups, it's never been easier to organize students into different cohorts based on registration type or incoming class "

said O'Brien (PS 19, Bronx). "And, combined with Automated Reminders, both the school and our families can get the right information without an avalanche of backpack letters and constantly chasing parents for missing or incomplete forms."

Other functionality identified as critical to providing a robust, scalable online solution for registration and onboarding included multi-language capabilities, mobile accessibility, as well as out-of-the-box templates and PDF mapping to official DOE formats.

"Parents and staff love the convenience of the multi-language capabilities," said Calabrese (PS 9, Staten Island). "Combined with the ability to access Operoo from any device, it's made a big difference to form completion and engagement rates. We're now using Operoo for all our school documents, not just registration and onboarding."

"Operoo's ability to automatically translate all forms, documents and communications into the recipients' home language has been hugely impactful for PS 130," said Fong. "This used to be a slow process, as we had to wait for documents from the DOE's translation unit. On top of that, our teachers and office staff are reporting much better response rates from our ENL families for registration documentation, such as Pre-K ASQ3 Assessment Forms."

"As an ENL teacher, I love that my parents can receive forms and vital updates in their home language," said Larivee (PS 100, Bronx). "With Operoo, we know that we're putting equity and access front-and-center and keeping our community safe and informed."

Lisa Calabrese, Parent Coordinator at PS 9 in Staten Island, pointed to Operoo's form templates and PDF mapping capabilities as critical: "Using Operoo and its best practice templates, PS 9 was able to seamlessly replicate, distribute and collect mandated forms digitally and automatically map them back to NYCDOE issued PDFs for record keeping — from Proof of Age Forms and Home Language Identification Surveys, to Proof of Residency and ATS Admissions Forms."

"Not only does the Operoo platform contain all the official form templates we need for the DOE, you can also modify those templates to meet your exact requirements," said Ellis (PS 130, Manhattan). "We found this particularly useful for a range of forms collected during the beginning of a new school year, including the Permission to Walk Home Form."

The Results
Collecting better data more efficiently, while reducing strain on families and school resources

Brooklyn: John W. Kimball (PS 107)

"We completed what is normally a 3-month process in August alone," said Rosenberg. "Thanks to the support of the Operoo team, I was able to set-up everything in Operoo, hit 'enable', and register our entire Pre-K and Kindergarten cohorts. It was amazing.

" Neither myself, nor our incoming families, could believe it was that simple, quick and easy. "

The Bronx: Isaac Clason (PS 100) and Judith K. Weiss School (PS 19)

"Traditionally, registration is a long and drawn-out process that takes a team of 10 people, as we're copying everything three times," said Larivee (PS 100). "This time, because it was all digitized and automated through Operoo, it took just two of us to complete registration for 150 new students.

" The usual stress and piles of paperwork simply disappeared. "

"By using Operoo to digitize all our registration and onboarding processes for both new and returning students, we've now got over 95 percent of our families confidently using the system, which is fantastic consistency. This widespread adoption means we can give all parents equal access to vital information in a way not previously possible, which will hold us in great stead for all school communications moving forward."

Principal at PS 19, Ellen O'brien, said that Operoo had enabled the school to get registration and onboarding information into parents' hands fast and receive responses even faster.

" We've never had faster or higher responses rates "

said O'brien. "The system-driven reminders for parents are magic. A couple of examples come to mind straight away.

"At the start of each school year, we need to distribute and collect signed Media Consent Forms for all 540 students. This alone used to take up to two months. With Operoo, it took just one week to receive all the consented forms. We also recently sent out COVID-19 Consent Forms via Operoo. We had 85 percent of families complete and submit the form within the first two days.

"Operoo's tech support is amazing. We were able to digitally complete registration for all our new Pre-K [18] and Kindergarten [50] students with ease."

Manhattan: Hernando De Soto (PS 130)

" We've saved hundreds of hours of staff time, and I'm sure many more for our parent community "

said Fong. "By digitizing and automating everything through Operoo, there's no more populating information from the DOE into forms by hand, or manually preparing language-specific packets and home language surveys for our ENL families.

"By driving all start-of-school registration and onboarding through Operoo, 100 percent of our parents are now using the platform, which is phenomenal adoption. Not only does this improve trackability, transparency and efficiency for staff and parents alike, families are feeling more connected because of the consistent communication through Operoo. Operoo's helped keep our community connected in difficult times."

Staten Island: Naples Street Elementary School (PS 9)

"When we were remote and didn't know how we'd get registration done, Operoo simply worked," said Calabrese. "We digitally completed all our new enrollments for Pre-K [36] and Kindergarten [37] with ease.

> *The convenience for staff and parents is enormous. Operoo's just become part of our lives.*

"Digitizing our Blue Cards with Operoo was enormously important. By pushing those out online, and making them a compulsory aspect of new year onboarding for all students, all of our 300 families are now actively using the Operoo platform. Parents love the flexibility to complete any form or acknowledge any piece of communication anytime, straight from their smartphone. All our staff love the visibility and automation — from the Principal to the school secretary and nurse."

Queens: Talfourd Lawn Elementary School (PS 50)

"With Operoo, we completed registration for all new Pre-K [90] and Kindergarten [140] students entirely online in August," said Handler-Velazque. "Normally, we're pushing right through to the end of September.

> *The efficiency was amazing.*

"Operoo's been equally successful when it comes to new year onboarding documentation too. For example, there were 300 applications for parents to complete our Free and Reduced School Lunch [FRL] program and we received responses within days of distributing the link.

"Parents love the flexibility — they can complete forms whenever and wherever suits them. Operoo's multi-language support has also streamlined our communication with, and responsiveness from, our ENL families. Everything is so much faster."

Beyond Student Registration and Onboarding
Managing COVID-19: Daily Health Check-Ins, Flexi-Scheduling and crisis communications

Shortly after the beginning of the 20/21 school year, Pamela Rosenberg (PS 107, Brooklyn) said that finding and implementing a solution to manage daily health attestations was top-of-mind.

"After mandating a digital registration process for incoming students, the DOE also said they required schools to deploy a system for conducting daily health checks for staff and students participating in on-campus learning," said Rosenberg. "However, if we used the DOE-issued form, we had no visibility over any data submitted. We needed a better way to effectively monitor, communicate and act on the health of our school community.

> *When elementary schools went back in person from December 7 2020, it was a relief to know that we had a compliant Daily Health Check-In and Flexi-Scheduling solution straight out-of-the-box with Operoo.*

"With Operoo's Blueprint feature, we were able to automatically send out the COVID Health Check Form to each learning group every morning that specific cohort was required at School. To gain entry to the school building, each student had to display the pass they received upon form completion. That way, we could ensure only healthy people set foot on campus and that the right people were in the right buildings on the right days."

For PS 19 in The Bronx, Principal Ellen O'brien was able to distribute urgent communications to her school community and keep them safe during two emergency shutdowns.

"Positive COVID cases prompted two school closures at PS 19," said O'brien. "Using Operoo, we were able to distribute communications to all our families at extremely short notice. We could track who had seen and acknowledged the school closure notification in real-time. Most importantly, we ultimately had nobody show-up to school on those days."

Similarly, Principal at PS 130 in Manhattan, Renny Fong, discovered his school needed to shut at 9pm the night before. Fong was able to manage the situation with Operoo.

"Due to a positive COVID case, our school needed to shut," said Fong. "But, we only discovered this late the night before. With Operoo, I could do two things quickly: Notify our 750 families, ensuring nobody arrived on campus while deep cleaning was in progress. I also remotely accessed the Blue Card details of the students who tested positive and shared that information with health authorities."

6 Ways Operoo Transforms Registration and Onboarding

All your registration and school forms ready-to-go

Digitally distribute and collect all required forms, with Operoo's ready-to-send pre-built forms.

Automated tracking and reminders

Don't waste effort calling and emailing parents over unreturned forms. Track response rates and let Operoo do the chasing for you.

Faster responses via multilingual & mobile access

Empower parents to complete forms using their language and device of choice.

Seamlessly communicate with pre-admitted and existing families

Send automated, group and personalized digital communications to parents of pre-admitted students with zero manual effort.

Trigger all new student onboarding requests upon enrollment

Operoo will programmatically trigger all new student onboarding requests upon enrollment, removing common registration bottlenecks.

Eliminate data double-handling with PDF mapping

Automatically map Operoo forms to official DOE PDF form templates. Stop asking parents to fill out the same forms come September.

Summary of Results

100% ON TIME
All students were registered and onboarded in time using Operoo — despite the pandemic.

3X FASTER REGISTRATION
With Operoo, PS 107 completed Pre-K and Kindergarten registration in one month, rather than three.

570 BLUE CARDS IN 1 CLICK
PS 100 requested and collected digital Blue Cards from all 570 of its students with one click using Operoo.

100S OF HOURS SAVED
"With Operoo, we saved hundreds of hours of staff time."
— Renny Fong, Principal at PS 130.

300 / 300
PS 50 received all 300 applications for its school lunch program within days of distributing the form via Operoo.

200 ⟶ 0
Instead of manually preparing 200 registration packets for new students, PS 130 automated everything via Operoo.

100% ONLINE
All students were registered and onboarded digitally for the first time using Operoo.

8X QUICKER CONSENT
PS 19 collected signed Media Consent Forms from all 540 students in just one week, instead of two months.

5X MORE EFFICIENT
PS 100 registered 150 new students with just two staff members managing the process, instead of the usual ten.

100% ADOPTION
"All of our 300 families are now actively using the Operoo platform." — Lisa Calabrese, Parent Coordinator at PS 9.

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