

How to Eliminate Paper ad Save Time and Money

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Today's Speakers

- Eva Olsaker, Senior Manager, Research and Consulting Center, GFOA
- Lisa Sagona, Director of Information Technology, City of Johnson City, TN



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About this Webinar

- COVID-19 required employees to work from home, but it also forced organizations to rethink their business processes that require access to the office or involve large amounts of paper.
- This webinar will provide Do It Yourself (DIY) and COTS opportunities for governments to move away from paper-based processes.
- Lisa Sagona will share with us Johnson City's case study and she will demonstrate their form builder tool, "Wufoo"



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Polling Question

- Are you still using paper-based applications for:
 - Timesheets?
 - Permits?
 - Miscellaneous applications?
 - Other?
 - No, we are paperless for the most part



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Polling Question

- Did COVID-19 change the way your organization conducted business?
 - Yes
 - No



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Methods for Opportunities

- DIY
 - Easy, basic solutions to reduce paper using low or no cost, commonly available technologies.
 - Photographs
 - Spreadsheets
- COTS (commercial off the shelf)
 - Microsoft SharePoint
 - WuFoo



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Opportunity #1

Electronic Routing and Workflow Instead of Paper Forms

- Paper is still used for routing and workflow approvals
 - Multi-page PO approval, etc.
- DIY Opportunity
 - Send an email or text to the appropriate person and he/she can reply
- COTS Opportunity
 - Look for existing technology within your organization. You may already have solutions to meet your needs
 - Document Management Systems
 - ERP systems (if modern)
 - Microsoft SharePoint
 - Microsoft Power Automate (part of Office 365)



Opportunity #2

Electronic Time Sheets

- Many governments still have employees submit paper time sheets (payroll, labor allocation for projects and programs)
- DIY Opportunity
 - Employees can fill out their timesheet at home, then take a picture of it and text or email it to their manager for approval
 - Employees or managers can create a spreadsheet, then employees enter their time, then email the spreadsheet to their approver. Or employees can post to a shared drive
 - Lisa will provide example
- COTS Opportunity
 - Free or low-cost time sheet and project management software can be used to track employee's time



Opportunity #3

Electronic Forms Tools

- Governments still rely on paper applications or forms that are hand delivered to the office. Electronic form-building tools allow users to create forms to collect data, files, and payments
- DIY Opportunity
 - Allow citizens to download the application/form from your website to fill out where they scan or take a picture of the completed application/form, and then email it to the appropriate department
- COTS Opportunity
 - Eliminate the paper form altogether by creating an online form that will capture the same information as the paper version.
 - Johnson City, TN case study
 - Wufoo
 - Zoho Forms
 - Google Forms



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Opportunity #4

eSignatures

- Many governments require wet signatures, where a person physically signs a document (e.g., contracts, time sheets, invoices). Governments should consider the use of electronic signatures (eSignatures).
- COTS Opportunity
 - DocuSign
 - Sign Now
 - PandaDoc



Opportunity #5

Issue Paychecks via Direct Deposit

- Printing checks requires staff to work from the office. Many organizations use direct deposit to pay employees as a way to avoid printing, stuffing envelopes, and mailing paychecks.
- DIY Opportunity
 - Set up an online form and have employees enter their banking information, or have them take a picture of a voided check and email or text it to payroll. Payroll can then update employee banking information to process direct deposit



Opportunity #6

Issue Electronic Payments to Vendors

- Many governments still issue and mail paper checks when those payments can be transmitted electronically
- DIY Opportunity
 - Set up an online form and have vendors provide their banking information in the form.
 - Vendors can also email or text a picture of their banking information.
 - Accounts payable can then update their record and process payments electronically



Opportunity #7

Accept Electronic Payments

- Accepting in-person checks or cash payments (property taxes, business license, etc.) is inefficient and unhealthy for the community (social distancing).
- DIY Opportunity
 - Create an Adobe-fillable form and have your customers fill out their banking and routing information.
 - Customers can also email or text a picture of a voided check.
 - Organizations can then set up the account for autodraft for future payments.
- COTS Opportunity
 - Set up an interactive voice response (IVR) system, where customers can make payments over the phone or via a website. IVR systems will act as the third-party payment collection provider



Opportunity #8

Create Electronic Accounts Receivable/Billing

- Local governments that do not have an accounts receivable module in their financial system (or ERP) often issue paper invoices to customers.
- DIY Opportunity
 - Create a Word (or electronic) version of an invoice and email it to the customer instead of a paper invoice
- COTS Opportunity
 - Implementing an ERP or financial system that includes an accounts receivable module will allow an organization to issue invoices (or templates) electronically through the system



Security Considerations

- Speak to your IT department to ensure you are adhering to security policies
- Ensure virus checker is turned on
- Ensure Firewall has been implemented
- Ensure COTS systems are PCI compliant
- Ensure form builder is secure
 - <https://www.wufoo.com/security/>
- Use a secure payment gateway
- Use secure signatures and data encryption
- Ensure security policies are in place for your organization



Johnson City, TN Case Study and Demonstration

- Why COVID changed some of our business processes
 - What we had in place, but expanded
- Utility Billing
- Electronic Timesheets
 - Produce electronic form [Excel, Wufoo, Adobe]
 - Submit electronically –use distribution lists
 - Approve & sign electronically [several options]
- Electronic Signatures



COVID-19 AUTOMATION EXAMPLES

- [SIGN UP FOR AUTOMATIC BANK DRAFT](#)
- [REQUEST TO TERMINATE SERVICE](#)
- [REQUEST NEW UTILITY SERVICE](#)
- [ELECTRONIC SIGNATURES – TIMESHEETS](#)



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WHY WUFOO?

Because creating web forms should be easy

- Anyone can create an online form quickly (no coding required)
- Forms are optimized for performance, flexibility, and security.
- Integrate with over a thousand of popular tools
- Automate workflows with branching and logic
- File uploads, real-time notifications
- Match your brand or website
- Accept online payments
- Built in cloud storage

Collect data, payments & files

Collect the data and **payments** you need, on your terms. Embed your form onto your website, or share it using a direct link.



Accept Payments

Have an online store? Collecting donations or event fees? Hook up your form with one of many popular payment providers we integrate with and get paid!



File Uploads

We don't file away the data you need. Collect all types of files through your form and access them whenever you need to, right from your account.



Real-Time Notifications

Get notified as soon as someone completes your form. We can send you a text or an email so you never miss a beat.



Easy-to-Use Online Form Builder

Easily create the forms you need to collect data, files and payments — without writing code.



Accept Online Payments

Process online payments through one of our **payment partners**, like PayPal, Stripe and Authorize.Net.



Create Unique Form Experiences

Design beautiful forms that match the look and feel of your brand or website, with or without CSS.



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<https://www.wufoo.com/features/>

and because...

MOBILE FORMS

are at their finest, from start to finish

Send responsive forms and track entries on the go

You're always moving—just like your customers, employees, and attendees. Use mobile [web forms](#) to cut the cord for good, so the only thing you're tied to is success.



Share forms instantly

Out and about and need some insights? Easily create and share forms via email and social media.



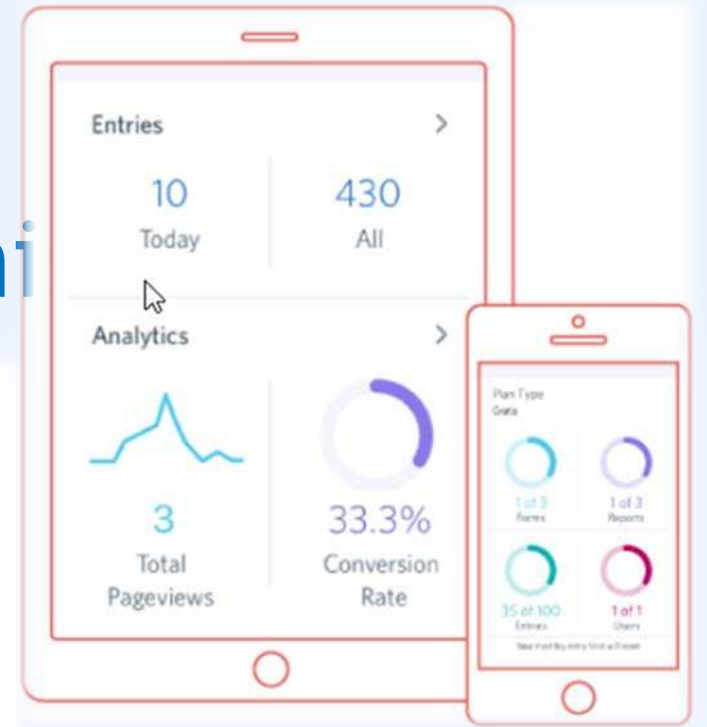
Collect entries anytime

Give anyone a mobile-ready form to fill out, whether they're placing an order, making a request, or sending feedback.



Check results anywhere

Watch real-time entries roll into your Wufoo account and dig into the results with mobile-friendly analytics.



“Create and share responsive forms that are a breeze to fill out, on any device!”



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Top Web Form Application



ProntoForms

ProntoForms is the leader in enterprise-grade mobile forms. Built with field teams at front of mind, ProntoForms makes real-time, accurate data collection fast and easy. Empower your field employees to complete ... [Learn more about ProntoForms](#)

★ 4.6 /5
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Device Magic

Device Magic replaces your organization's paper forms with customizable mobile forms that function offline. Device Magic is the easiest way to automate paperwork, such as inspections and reports, and digitize [Learn more about Device Magic](#)

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WebMerge

WebMerge document generation and form automation solution saves time, puts a stop to manual entry, and streamlines your paperwork processes. Upload, merge, and deliver smart documents in a snap. Automatically ... [Learn more about WebMerge](#)

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Wufoo

With Wufoo, you can easily build amazing online forms. Wufoo automatically builds the database, back-end and scripts when you design a form, helping you understand your data. [Learn more about Wufoo](#)

★ 4.4 /5
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And many more

- Creating & Managing Forms
 - Sample if time allows



- Using Adobe Pro to create forms
 - Sample if time allows



Polling Question

- Do you see opportunities where your organization can improve business processes and go paper-less?
 - Yes
 - No



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Questions



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Thank you!

- For access to all slides and resources shown on this webinar go to:
 - www.gfoa.org/ffa
- If you have questions, please use the chat feature to ask
- Our speakers
 - Eva Olsaker, eolsaker@gfoa.org
 - Lisa Sagona, lsagona@johnsoncitytn.org



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