Huntington Beach City School District

How We Solved Timecard Integration Challenges

Innovation at HBCSD

Huntington Beach City School District has a simple yet revolutionary belief:

Operational excellence throughout the district has a **direct impact on student achievement**.

Since 2021, HBCSD has applied innovation and outcome-oriented thinking to dramatically improve efficiency, reduce manual effort, shorten approval cycles, improve data quality, and ultimately increase productivity across the entire district.

This bold vision led them to examine processes that affect critical district operational flows – particularly those that require collaboration between departments.

More than 33 processes, including timecards, conference reimbursements, absence reports and vendor forms have since been moved onto online forms, e-signatures, and approval routes, driving change at all levels of the district.

"We want to spend more time supporting people, not handling paper."

Jenny Delgado, Assistant Superintendent of Administrative Services

Informed **K12**

Operational Excellence in Payroll

Prior to partnering with Informed K12, HBCSD was still heavily reliant on paper. As Jenny Delgado, Assistant Superintendent of Administrative Services recounts, "everything was piling up, but we didn't have enough people trained."

Furthermore, "people were leaving, retiring, getting promoted, and the knowledge required for payroll is very specific, very technical…not something where you could just leave a manual behind and someone could just follow."

Streamlining processes and capturing institutional knowledge into internal controls was extremely important for HBCSD to sustain operations far into the future. This is particularly important for payroll; unlike budgets and accounting, where mistakes can be caught through reconciliation, "you cannot make mistakes with payroll".

"With payroll, as soon as you make a mistake, if you don't catch it right away through the audit process, you're going to get an angry phone call. No one likes any mistakes on payroll or benefits."

Moving off of Paper

Three years ago, HBCSD moved timecards off of paper and onto Informed K12. Immediately the payroll team noticed the benefits of the platform's tracking technology.

"That was fabulous; the team stopped getting phone calls from people saying 'I sent it to you' but [the timecard] was probably still in the mail, in that inter-district envelope, and we never got it.

Now we know exactly where the timecards are, if they're with the employee, the principal, or perhaps our level and we made a mistake."

"No one likes any mistakes on payroll or benefits."

Jenny Delgado

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Digitization of Workflows

Ex: Classified OT Timecard

- Fully transition off of paper
- Adopt across all school sites
- Support HBCSD specific requirements
- Multiple approvals and signatures
- Collaboration on account and pay codes

HUNTINGTON BEACH CITY SCHOOL DISTRICT
EMPLOYEE TIMECARD

DUE TO PAYROLL BY THE 20TH

NAME-	LAST	FIRST	INITIAL	POSITION	STATUS	SCHOOL	DATE

REPORT HOURS WORKED IN EXCESS OF NORMAL CONTRACTED TIME

DATE	HOURS	CODE	DATE	HOURS	CODE	DATE	HOURS	CODE	
MONTH			MONTH			12			
21			1			13			REFER TO BOTTOM OF PAGE TO CONVERT PARTIAL HOURS TO DECIMAL FORMAT
22			2			14			
23			3			15			
24			4			16			
25			5			17			
26			6			18			
27			7			19			
28			8			20			
29			9						
30			10			TOTAL			
31			11			HOURS			

EMPLOYEE SIGNATURE

SUPERVISOR SIGNATURE (APPROVED)

REMARKS/REASON:

PAYROLL USE ONLY

PAYLINE	UNIT	RATE	LC	ACCOUNT#	REMARK

REMARKS/REASON:

ACCOUNT:

41200 (rev Nov 2021)

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Workflow

1 **Employee**
Name/info, hours, signature

2 **Office Manager/Secretary**
Remarks, account codes

3 **Supervisors/Directors**
Approve and sign

4 **Payroll Tech**
Pay codes, units, rates

5 **Second Approver**
Approve and sign, if required

6 **Payroll Tech**
Enter into payroll system

Informed K12

Emergent Integration Challenges

Increase in Manual Work

With timecards fully online and employees trained and happy, the Payroll team set their sights on new challenges: the data now securely stored in Informed K12 needed to be transformed into a format that could be readily uploaded into the Orange County OCDE payroll system.

"We had to download the data, massage it, use every tool in Excel, Pivot Tables, VLOOKUP in order to put all that data into a format that the county requires."

Debbie Jones, Payroll Technician, recognized the opportunity for a more efficient process.

"There's got to be an easier way. After the timecards were all done, I had to download them. And then I had to figure out, who has multiple pay lines, who has multiple pay rates?

It was just very time consuming. I was adding lines. I was adding formulas to move the units over to the [OCDE] template. I had to make sure the account numbers were all changed, move over the remarks. It took me like a good 6 to 10 hours to do all of this."

This was exacerbated by the tight timelines HBCSD had to abide by: their pay cycle ends on the 20th of every month, leaving the team a mere 6 days to process all of the timecards.

According to Jessie Lee, Payroll Lead, "when handling payroll, its time-sensitive nature can make getting stuck in the formulas very frustrating. When you check the calendar and see that the formula isn't working, it can be incredibly stressful."

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July 2023 HBCSD Onsite

In July 2023, the Informed K12 product and design team, accompanied by Sarah Chou (CEO) and Qian Wang (CTO) met with HBCSD during a week of customer visits in Orange County. The team was immediately struck by how eager and prepared HBCSD was to talk about their challenges.

As Sarah recalls, "I don't think we've ever gone to a district and had a team prepare a PowerPoint already to tell us about all the things that they wanted to see. We've seen more and more timecards post-pandemic than ever. Timekeeping is very complex across county offices and usually unique to each district as well."

For Jenny, the challenge was clear: "we have to be able to just get that data, extract the data, and create some kind of bridge. We know what fields are on the other end. We know what OCDE requires from our time cards. So we just need somehow to create a bridge."

Dramatic Reduction in Manual Work

Of paramount importance was to continue supporting all of the capabilities unique to HBCSD. To achieve this, Informed K12 worked with a partner specializing in integrations and interoperability: **ConnectK12.ai**.

This collaboration resulted in the following simplifications:

1. HBCSD payroll logs into ConnectK12.ai's secure portal at the end of each pay cycle.

2. Payroll uploads a new OCDE template into the portal.

3. The portal automatically retrieves data from Informed K12 timecards.

4. Over a dozen data transformations and error checks are automatically performed.

5. Payroll downloads are completed, OCDE Record 60 compliant Excel file.

"Now, with this portal, it's just instant. You get instant results. The data itself is 100% accurate, and we don't see any errors."

Jessie Lee, Payroll Lead

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OCDE Template

Employee ID	Last Name	First Name	Pay Line Start D	Pay Line End Da
2800004278	JACKSON	RICHARD	10-01-2023	06-21-2024
2800004117	JONES	BARBARA	09-06-2023	06-21-2024
2800003940	THOMAS	ROBERT	11-01-2023	06-21-2024
2800004435	MARTIN	JOSEPH	09-07-2023	06-21-2024
2800003891	MARTINEZ	MICHAEL	09-05-2023	06-21-2024
2800003891	WILSON	ELIZABETH	09-05-2023	06-21-2023
2800001283	BROWN	THOMAS	09-21-2023	06-21-2024
2800004432	DAVIS	WILLIAM	09-07-2023	06-21-2024
2800002191	SMITH	KAREN	09-07-2023	06-21-2024
2800004252	JOHNSON	DAVID	09-25-2023	06-30-2024
2800004652	WILLIAMS	JENNIFER	10-02-2023	06-30-2024
2800001153	BROWN	JOHN	09-07-2023	06-21-2024
2800004779	DAVIS	JOSEPH	09-08-2023	06-21-2024
2800002931	WILLIAMS	SUSAN	09-05-2023	06-21-2024
2800003887	JOHNSON	BARBARA	09-05-2023	06-21-2024
2800004558	ANDERSON	JOHN	11-01-2023	06-27-2024

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Completed Timecards

HUNTINGTON BEACH CITY SCHOOL DISTRICT
EMPLOYEE TIMECARD
DUE TO PAYROLL BY THE 20TH

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EMPLOYEE SIGNATURE   SUPERVISOR SIGNATURE (APPROVED)

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41200 (rev Nov 2021)

Campaign Responses API

Connect K12
Self-Service Portal

Timecard Portal

Pay Cycles for Timecards (Salmon)

View Instructions ⌄   ⟳   + New Pay Cycle

09B

07B_Active_Paylines_Sanitized.xlsx Template   09B
Mar 7, 2024   Feb 21, 2024 – Mar 20, 2024   Download   Delete

09B_Active_Paylines_Salmon_2024-03-07.xlsx Processed   09B
Mar 7, 2024   Feb 21, 2024 – Mar 20, 2024   Download   Delete

Completed OCDE Record 60

Employee ID	Last Name	First Name	Pay Line Pay Fa	Pay Line Percen	Units	Amount	Retirement Earn	Pay Line Account Code
2800004685	ANDERSON	DAVID	23.187	0.5	13.08			0102349060-2285
2800004467	TAYLOR	JESSICA	17.863	0.25	18.00			0125106762-2920
2800003704	TAYLOR	JESSICA	27.975	0.6875	5.75			1306373510-2485
2800004409	MILLER	LINDA	17.863	0.25	11.00			0128106762-2485
2800004523	TAYLOR	DAVID	25.852	0.713				0108280080-2475
2800004085	JOHNSON	LINDA	17.863	0.25	35.75			0111106762-2920
2800002126	WILSON	JESSICA	23.781	0.625	1.00			1306373510-2485
2800004698	SMITH	JOHN	17.233	0.25	33.00			0113106762-2920
2800003712	TAYLOR	KAREN	33.903	0.75	12.00			0102247435-2485
2800002875	BROWN	SARAH	26.6	0.7187	7.50			1306373510-2485
2800004529	JOHNSON	RICHARD	17.863	0.25	18.00			0122106762-2920
2800004526	JOHNSON	RICHARD	17.863	0.25	9.50			0122103010-2141
2800002295	WILSON	BARBARA	17.863	0.25	15.75			0123103010-2110
2800002295	WILSON	BARBARA	17.863	0.25	40.00			0121106762-2110
2800004136	GONZALEZ	JOSEPH	17.863	0.25	65.50			0113106762-2920
2800004631	THOMAS	JESSICA	17.233	0.25	22.00			0121103010-2110
2800003002	WILSON	KAREN	17.863	0.25	52.00			0125109190-2920
2800003002	WILSON	KAREN	17.863	0.25	6.00			0125106762-2920
2800003630	JOHNSON	JESSICA	27.225	0.5	9.50			0102349060-2285
2800003630	JOHNSON	MICHAEL	27.225	0.5	30.00			0100347425-2285
2800001549	SMITH	JENNIFER	27.333	0.713	10.53			0125101005-2185
2800003498	WILLIAMS	ROBERT	34.863	0.75	32.75			0102247435-2485
2800001337	MOORE	JOSEPH	30.495	0.713	13.53			0125101005-2185
2800004528	BROWN	ELIZABETH	17.863	0.25	19.00			0113106762-2920
2800004790	WILSON	RICHARD	16.786	0.25	12.00			0122106762-2920
2800003948	JACKSON	JOSEPH	17.863	0.25	30.75			0113106762-2920

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> **"The impact of the portal can be summarized in three words: simplicity, efficiency, and accuracy."**
>
> Jessie Lee, Payroll Lead
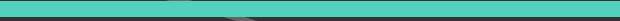
Within a few months, the payroll team achieved:

Simplicity
What used to take hundreds of manual steps now takes the team a few clicks. All of this can now be done entirely through the ConnectK12.ai portal, thanks to Informed K12's export API.

Efficiency
Time spent processing overtime timecards went from 6-10 hours per payroll cycle to approximately 15 minutes. This is a 96-98% reduction in work, or a 24-40X gain in productivity.

Accuracy
As of the last 4 pay cycles (January-April 2024), the team reports 100% accuracy. The built-in error detection, combined with all the benefits of moving timecards online, allows payroll to instantly spot and remediate issues.
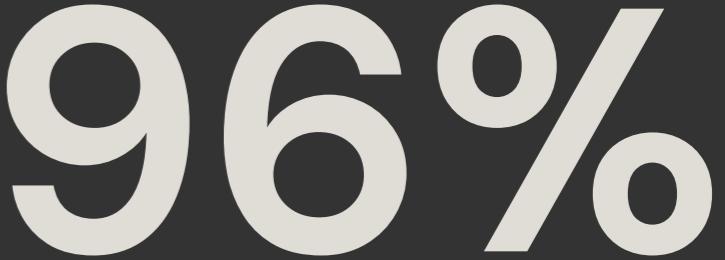
96%

Reduction of Work

Informed K12

Operational Excellence

Collaboration between Departments and Interoperability with Databases

HBCSD's timecard digitization and integration initiative is just one of many examples of how Informed K12 drives innovation across teams on the most critical Jobs to be Done at the district.

"This has really improved relationships and communications with school sites and departments," says Jenny.

"The technology is here, artificial intelligence is here. Now our team has more time to support school sites, other priorities, and benefits."

(SIS)
Schools

- Timesheets
- Direct deposit
- Expenses
- Mileage reimbursements
- Field trip requests

- PAF / ERCA
- Onboarding
- Emergency Contact
- Benefits
- CSEA / CTA

Business
(ERP / Payroll)

HR
(HRIS)

Informed **K12**