

Case Study

Streamlining Special Education Referrals at Erie 1 BOCES with SchoolStatus Forms & Flows

Discover how Erie 1 BOCES transformed their outdated internal referral system with SchoolStatus Forms & Flows' (formerly Operoo) customizable forms and document management, creating an efficient process for managing special education placements across 48 school districts.

Erie 1 BOCES (Board of Cooperative Educational Services)



Challenge

Replace outdated internal referral system



District Size

19 component school districts plus 29 cross-contract districts



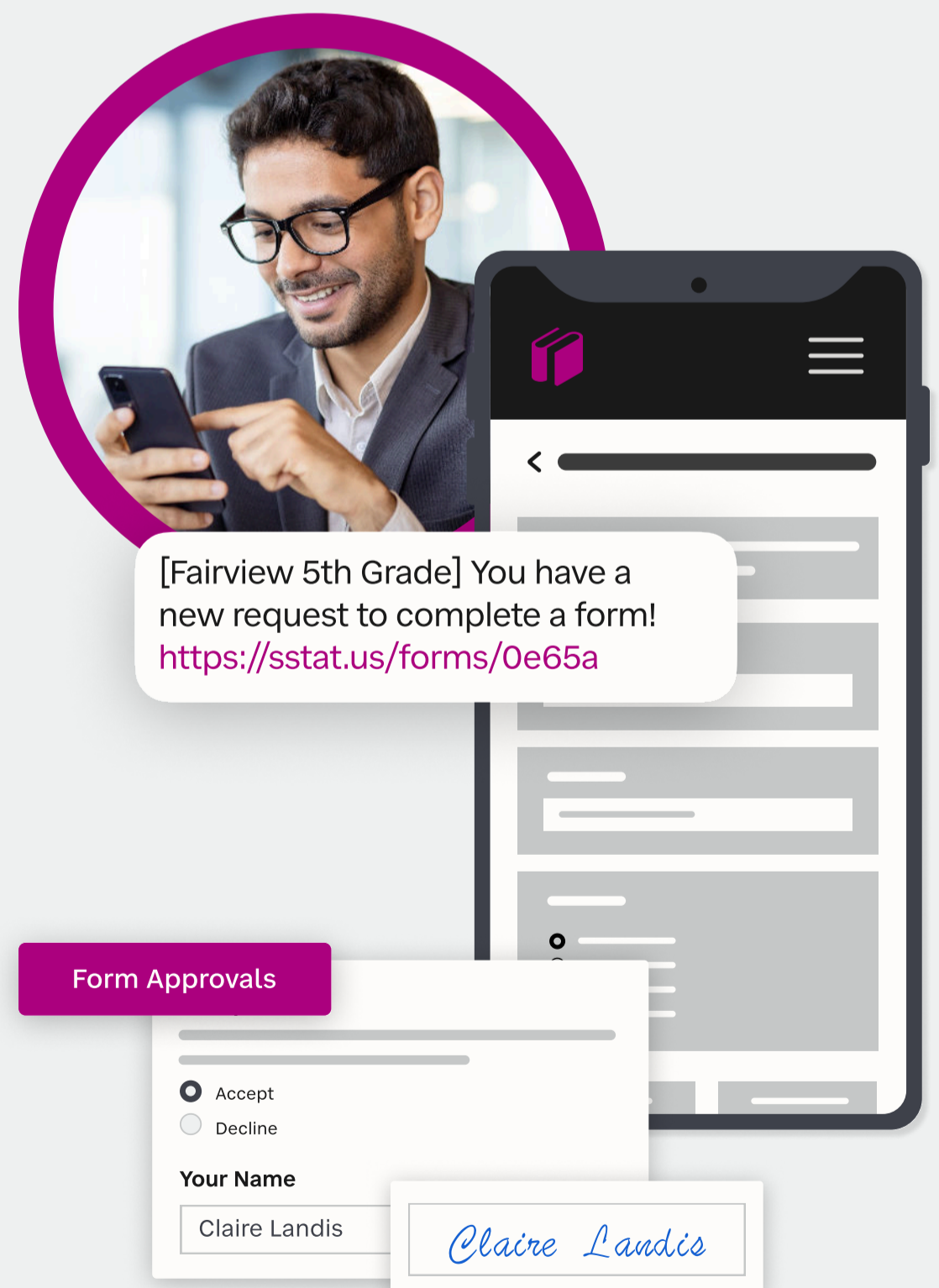
Location

New York



Products Used

SchoolStatus Forms & Flows (formerly Operoo)

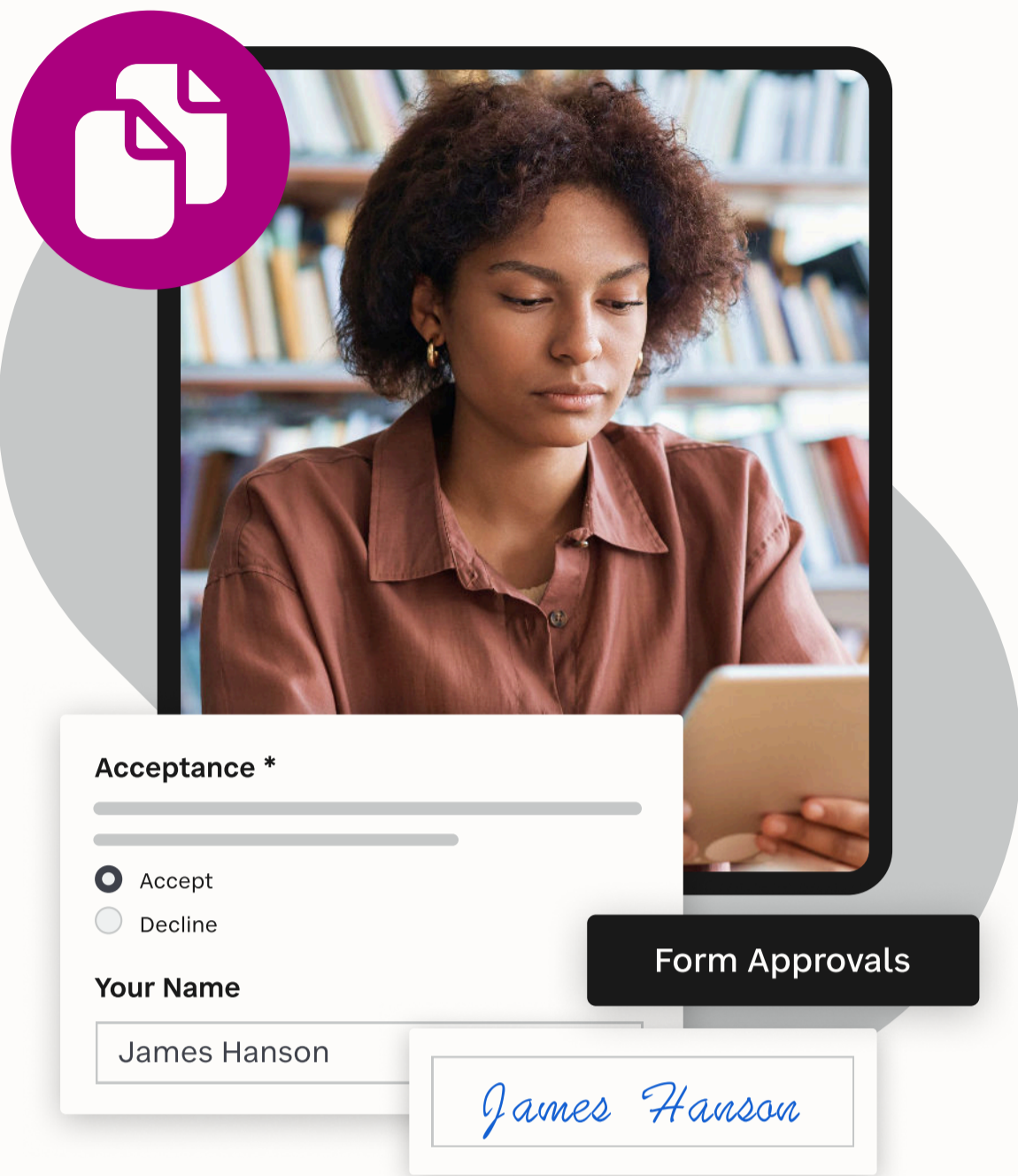




Erie 1 BOCES, a regional educational service agency across Western New York, faced significant challenges with their aging special education referral system. Processing hundreds of complex referrals annually—each containing up to 150 pages of critical documentation—had become increasingly difficult with their internally-developed system.

"Our computer program was developed here maybe 10-15 years ago, and it was becoming very, very out of date and hard to maintain," explains Emily Sass, Supervisor of Exceptional Education at Erie 1 BOCES. "We were put on notice that it's going to be more and more difficult to continue maintaining this internally created program."

After evaluating various options, Erie 1 BOCES selected SchoolStatus Forms & Flows to transform their referral management process. This case study explores how the organization successfully implemented SchoolStatus's customizable platform to replace their legacy system and expand functionality across multiple programs, creating a more efficient process for managing special education placements throughout their region.



The Solution

After beginning their search in January 2023, Erie 1 BOCES implemented SchoolStatus Forms & Flows to address their complex referral management requirements. The platform delivered several key capabilities that directly addressed their challenges:

- ◆ **Document Management:**
Efficiently handles referral packets ranging from 30-150 pages per student
- ◆ **Customizable Forms:**
Created approximately 10 different specialized forms for various programs
- ◆ **Status Tracking:**
Districts gained visibility into referral status with direct feedback in the system
- ◆ **Form Activation Control:**
Ability to activate and deactivate forms based on enrollment periods
- ◆ **Cross-Device Accessibility:**
Staff can access referrals from any location using various devices

The Challenge

Erie 1 BOCES needed a solution that could handle their specific requirements: accepting student referrals for special class placements from approximately 48 school districts, managing related service requests, and supporting their summer school program—each with different workflows. Additionally, they required robust document management capabilities to handle substantial referral packets for each student.

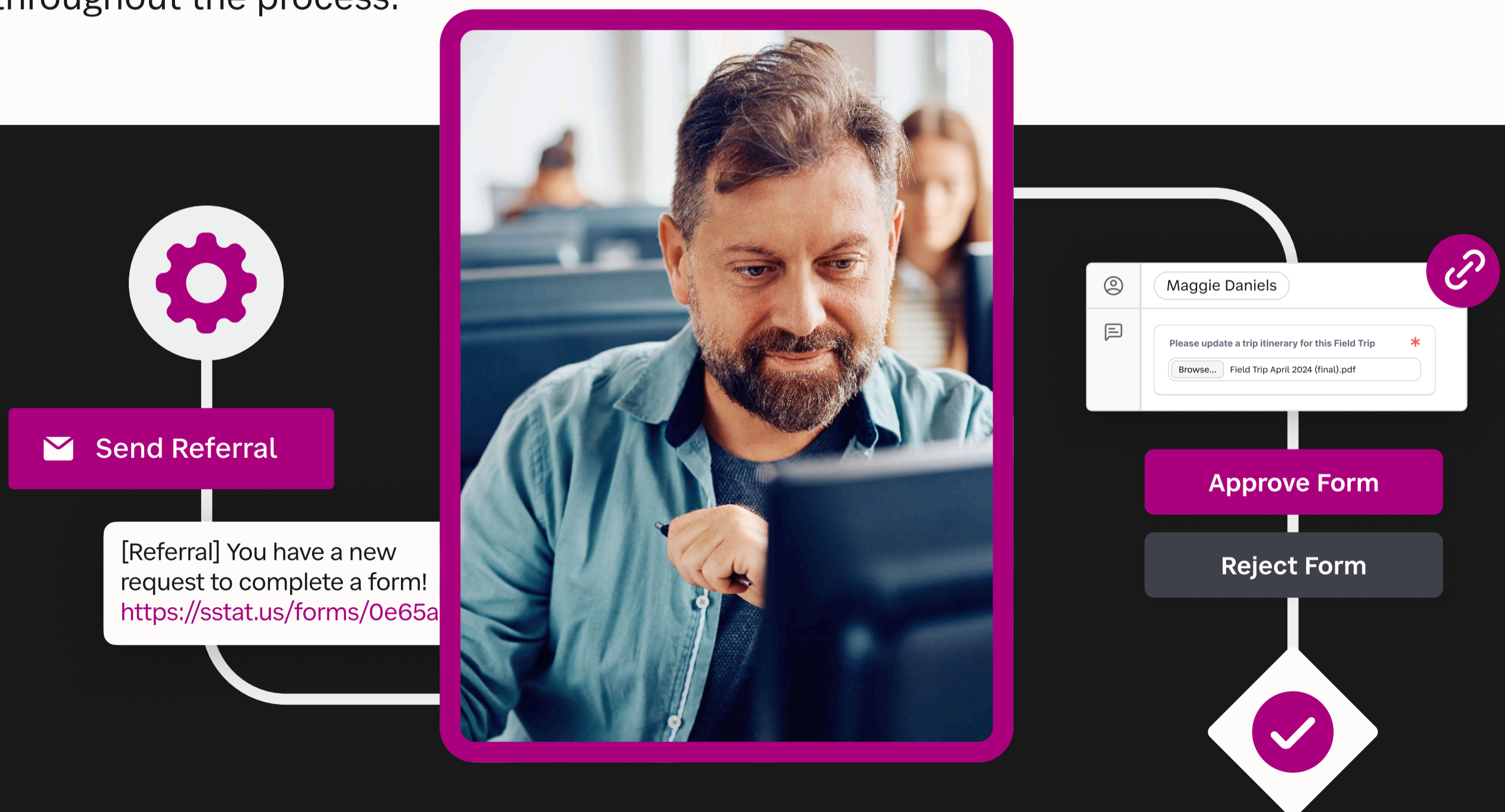
The organization's tech department had warned that their internal system was becoming unsustainable, creating an urgent need for a modern, commercial solution that could match and improve upon their existing processes while being easier to maintain and update.

SchoolStatus Forms & Flows

SchoolStatus's flexibility enabled Erie 1 BOCES to implement specific workflows tailored to their referral process. When a district submits a referral, it follows a structured review path: first, support staff verify all required documentation is included; if anything is missing, the system allows them to reject the application with specific feedback. Once complete, the referral team reviews and determines appropriate placement options, then channels it to the relevant program administrators. The system tracks each step while maintaining clear communication with districts throughout the process.

What we needed was to be able to accept student referrals for special class placements across all of our districts, accept related service requests, and manage our summer school program that runs entirely differently," explains Sass. "We needed it to all function very specifically with the ability to attach documents—that was the biggest thing.

The implementation followed a methodical approach, starting with core special education referrals before expanding to other programs. SchoolStatus's team provided consistent support through bi-weekly meetings and responsive technical assistance throughout the process.



The Results

The implementation of SchoolStatus Forms & Flows has delivered substantial measurable improvements to Erie 1 BOCES' referral management process:

- **Efficient Document Processing:**
The system now handles approximately 800 summer program applications alone, dramatically reducing physical paperwork and storage requirements.
- **Reduced Communication Overhead:**
With SchoolStatus's built-in feedback mechanism, the process that previously required 3-4 email exchanges per referral is now completed within the system, eliminating an estimated **2,400+ emails** annually across summer applications alone.
- **Enhanced Reporting Capabilities:**
"I was able to quickly export that Excel file from just this year, add a column for something that isn't in our current form, and literally go kid by kid with all the information readily available," explains Sass.
- **Improved Form Management:**
The ability to activate and deactivate forms has eliminated submission errors that previously required staff time to correct. During seasonal transitions like summer registration, this feature prevents misdirected applications that would have required manual intervention.
- **Expanded Program Support:**
Since initial implementation, Erie 1 BOCES has systematically expanded from their original two forms to approximately ten different specialized forms across multiple programs, including special education placements, related services, summer school, virtual academy, and alternative education.
- **Streamlined District Experience:**
"What they really like is if you reject something, they don't have to redo an entire application. They can just click to resubmit, add information, and resend it back to us," notes Sass, highlighting time savings for district personnel.



3-4 fewer exchanges per referral

Eliminating

2,400


emails

Conclusion

Erie 1 BOCES' implementation of SchoolStatus Forms & Flows has fundamentally transformed how they manage student referrals, delivering substantial value beyond simply replacing their outdated system. The platform has become central to their operational efficiency, allowing staff to focus on their core mission of serving students with exceptional needs.

Looking ahead, they plan to complete their transition of all remaining programs into SchoolStatus, including Home Hospital Instruction, creating a unified digital system for all student placement and service requests. "We've only scratched the surface of what this program can actually do," notes Sass. "Once we get every program on, I'll be ready to explore what else we can accomplish."

For educational service agencies and school districts struggling with outdated systems, paper-heavy processes, or complex program management, Erie 1 BOCES' experience demonstrates the transformative impact of implementing a flexible, purpose-built platform like SchoolStatus Forms & Flows. Their methodical approach—starting with core needs and gradually expanding—provides a blueprint for successful implementation that minimizes disruption while maximizing adoption.

"Everyone internally loves using it, and we're just going to continue to grow with it and get more and more streamlined with all of our programs," concludes Sass. "This has met our need in every way."

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