



“ We worked for about 2 years to bring in an e-forms and workflow solution. Through an RFP process we selected clevr. They are Education Law 2-d compliant and we're pleased to launch clevr as one of our new services. ”

Jeffrey Luks, Manager, Student Services

## Challenge

Capital Region BOCES was seeking proposals for Forms and Workflow Software as requested by the Northeast Regional Information Center (NERIC). The BOCES sought to procure a robust, easy to configure and use software solution that can create forms and workflows to automate processes, notifications and approvals to increase efficiencies in various business processes of the BOCES and school districts served by NERIC. Security and protection of personally identifiable information and safeguards associated with industry standards and best practices, was of the utmost importance.

## Solution

clevr, a vendor-hosted (cloud) solution was awarded the bid for Forms and Workflow Software. Among the system requirements included: the ability to create a repository for forms and workflow templates to share regionally, and ensure security for staff and student sensitive PII data. The Northeastern Regional Information Center (NERIC), a division of BOCES, is a consortium of school districts as well as a computer systems integrator for approximately 137 public and over 65 non-public K-12 school districts in northeastern New York State. clevr is the exclusive partner to supply Forms and Workflow Software to these districts on a renewable contract.

## Agency Overview

**Location:** New York State  
**Districts Served:** 202

