# Simplifying the financial aid process from weeks to just days.

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**LENA MASON**
FINANCIAL AID TECHNOLOGY SPECIALIST

### QUICK FACTS
- ▶ Softdocs customer since 2011
- ▶ Implemented in Financial Aid

### KEY PLAYERS
- ▶ Lena Mason, Financial Aid Technology Specialist

### CHALLENGES
- ▶ Physical paper consuming the Financial Aid office
- ▶ Large call volume with student questions
- ▶ Countless hours managing mail

### SOLUTIONS
The Softdocs ECM Platform:
- ▶ Addition of Electronic Forms
- ▶ Secure web viewing of applications for scholarship committee
- ▶ Access to student files across all campuses

## CABRILLO COLLEGE

SANTA CRUZ, CALIFORNIA

Named after the explorer Juan Rodríguez Cabrillo, Cabrillo College overlooks the Monterey Bay in Aptos, California. With more than 70 fields of study and 14,000 students, Cabrillo is one of 112 public community colleges in California.

# For years, Cabrillo College was drowning in paper.

Their Financial Aid office was printing, filing and managing countless forms for the more than 10,000 students applying for aid each year.

The staff was overwhelmed by mail, spending up to five or six hours each day managing thousands of incoming and outgoing documents and still falling behind. It was then that Cabrillo knew they needed a change.

"I honestly didn't know anything about document imaging before this," says Lena Mason, Cabrillo's Financial Aid Technology Specialist. "But I met a Softdocs representative at a tradeshow, and even though he knew I wasn't able to fund a solution yet, he let me ask any question I wanted. With his help, I was able to understand what we wanted from a document management solution." After funding came through, Cabrillo went out to bid, and came down to Softdocs and one other provider.

*"We actually went down to Columbia, SC for on-site visits with some of their current customers. It was really helpful because we were able to see what worked for other people and what didn't."*

Cabrillo conducted on-site visits with the other provider's customers too, but ultimately decided Softdocs would be the best option for them.

"We chose Softdocs because of their e-forms, every other vendor we looked at just focused on managing our paper. Softdocs was the only provider who actually wanted to help us eliminate the need for paper to begin with."

Softdocs' Electronic Forms and Workflow solutions now digitize every paper-based form that Cabrillo's students need to complete for Financial Aid. The e-forms are pre-populated with a student's information determined by their user data. Each e-form is built with specific rules and field triggers to minimize incorrect answers and eliminate incomplete e-forms.

"When you're processing and reviewing hundreds of forms each day, it already takes a while for a student to receive their aid—an incomplete form just delays that even more. But with the e-forms solution, we can make it so a form cannot be submitted until the student has filled out all of the necessary fields," says Mason.

As any Financial Aid employee knows, paper-based PDF forms can cause more problems than they fix. Even if a student correctly fills out the information the first time, the number of ways the form can get lost or damaged on the way to the Financial Aid office is staggering.

Students might crumple up a form at the bottom of their bookbag or spill their morning coffee on it. Paper forms can get lost or damaged in the mail, accidentally mixed in with other students' forms, or otherwise get "lost in the shuffle." And most of the time, it's an innocent Financial Aid employee who gets an earful from a frustrated student looking for their aid.

According to Mason, call volume to the Financial Aid office has dropped dramatically and most of the calls now are simple questions regarding the e-forms solution rather than time-consuming demands for proof that a form was received.

## Time Saved

Softdocs' Electronic Forms solution has also saved the Financial Aid staff countless hours spent dealing with mail.

"Before [Softdocs], it would take us at least a week just to put together and mail the aid packets to every single student," says Mason. "Then, depending on where they lived, it could take three to four days just to get to their house. On average, it would be another week or two before the forms were actually filled out and put back in the mail, and then another three or four days to get back to us. With the huge volume of mail we were getting, it could take another week to be posted and then an additional week to be prepped for review.

"If a form was sent to the wrong address or filled out incorrectly, it could make the whole process take twice as long." Now, she says, the previously month-long process has been shortened to just a few days.

"An automated email goes out to the student the same day an e-form is requested, and they usually send it back to us within a day or two. Now that the files and forms are electronic, they no longer need to be prepped for review. If a student submits all their forms just before the weekly review is run they go straight to review," says Mason.

Once an e-form is submitted and posted to Datatel's Web Advisor, it is automatically stored in the student's electronic folder within Softdocs' Content Management solution.

*"Everything is in one place, anyone can get to it at any time, which has eliminated communication delays between our different campuses."*

"Rather than getting forms from other campuses once or twice a week, we can see them as soon as they populate to the content management solution."

The ability to see a student's documents at a moment's notice is just one way Softdocs' ECM Platform has helped automate processes for Cabrillo. The solutions also provide workflow for the few paper documents the Financial Aid office still receives, such as tax forms.

"Students still have to send us their paper tax documents, but with Softdocs we can actually set up workflows to send the scanned document to their e-forms and workflow solution queue, which goes back to the person who originally requested the e-form. Softdocs really helped us think out of the box for unique workflow situations we needed to manage," says Mason.

Even Cabrillo's scholarship ranking system is simplified with the Softdocs platform. Mason uses Softdocs' Print Customization solution to generate students' unofficial transcripts and the e-forms solution for students to apply for scholarships online. She then automatically archives the transcripts, applications and other documents into the content management solution for easy viewing by their scholarship committee.

*"Rather than each committee member having to come pick up this huge box of student documents for review, they can simply log into Web View [the view-only instance of Softdocs' Content Management solution] and see everything."*

## Continued Support

Software solutions are not the only reason Cabrillo likes working with Softdocs. When she has a question, Mason has no problems calling the Softdocs Support team.

"Their support is unlike any other setup I've ever worked with," Mason says. "I don't feel like I'm being 'rung up' or like I can hear dollar signs in their heads every time I call. They are so responsive and helpful—and they are really willing to actually teach you so a problem doesn't happen more than once."

In the future, Mason says she's looking forward to greater integration with Datatel Colleague—Cabrillo is working toward automatic updates to Colleague from the e-forms solution. But for now, she's happy with the countless dollars and hours her department has saved with the Softdocs ECM Platform.

*"Everyone's Financial Aid will get out on time this year, I can't wait for that!"*

**ABOUT SOFTDOCS**

*Softdocs is a privately-held software company focused on the development, implementation and support of enterprise content management, electronic forms and workflow solutions for the education marketplace.*

*With a next generation, fully browser-based platform, Softdocs' solutions integrate directly with existing ERP solutions. Institutions are able to eliminate the need for paper-based records and processes institution-wide from student records, finance, human resources, and beyond.*