

# With Etrieve, Polk State College used electronic forms and new efficiencies in document imaging to transform student service.

*“We can search in different ways. We can search by name, by student id or by document type. We couldn’t do that as easily before. So, it’s just a lot more versatile for us than our old system.”*

## MARTHA SMITH

ASSISTANT REGISTRAR

### QUICK FACTS

- ▶ Already leveraging a Jenzabar ERP system, Polk State chose Etrieve Cloud for its robust integrations
- ▶ The processing of Florida Residency Declarations greatly improved with Etrieve

### KEY PLAYERS

- ▶ Kathy Bucklew, Director Student Enrollment Services/Registrar
- ▶ Martha Smith, Assistant Registrar

### CHALLENGES

- ▶ Constraints of previous scanning solution
- ▶ Difficulty finding documents that were stored electronically

### SOLUTIONS

#### *The Softdocs ECM Platform™*

- ▶ Etrieve Content
- ▶ Electronic Forms
- ▶ Etrieve Flow
- ▶ Doc e Serve



## POLK STATE COLLEGE

WINTER HAVEN, FL

A state college offering Associate’s and Bachelor’s degrees, Polk State College serves around 13,000 students every semester. Established in 1964, Polk State College offers a range of programs, degrees and certificates.



Limited by a document imaging system that no longer matched their needs, Polk State College utilized Etrieve to transform how information was managed across campus.



### Scanning Troubles

Prior to finding **Etrieve by Softdocs™**, Polk State College was already using a document imaging solution, but with mixed results. The cumbersome system was simply too hard to use. Documents could easily be scanned into incorrect categories, making them difficult to find. In addition, there were constant communication issues between users and the system software.

### Choosing Etrieve

As a next-generation ECM solution focused on the needs and processes of educational institutions, **Etrieve by Softdocs** helps institutions gain full control over how information is captured, processed and distributed. **Etrieve's** user friendly interface made it easy for employees to understand how to get started with Etrieve, allowing Polk State to go live within six months of choosing the solution.

*“We were surprised at how easy implementation and training was and how well it worked out of the box.”*

“Because our old system had so many connection issues, everyone was motivated to move to a new system in hopes that it would be better,” said Martha Smith, Assistant Registrar. “I just think we were surprised at how much quicker and better it was than our last one,” said Smith.

### Etrieve — From Scanning to Mobile

Beginning to use Etrieve for scanning was one of the first steps for Polk State. Smith noticed that speed of scanning improved, and files were better categorized in the system.

“With our old system, you’d just have a student ID and all the documents were in a list, not filed away. Everything about scanning is better now! Scanned documents are clearer and much easier to read,” said Smith. This improved organization helps employees and students easily locate the files they need.

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Looking for much more than an upgrade in scanning, Polk State wanted to streamline their entire financial aid process, utilizing **Etrieve Forms** and **Etrieve Flow** to create efficiencies throughout the department. They needed an up-to-date solution that would allow students and employees to access forms from any device, wherever they were.

Kathy Bucklew, Polk State's Director Student Enrollment Services/Registrar, mentioned that Polk State needed to improve its efficiency of operations to allow staff to spend less time processing tasks and more time on improving the student experience.

Combining document management with electronic forms and automated workflows, **Etrieve** allowed Polk State to offer a mobile-first solution to their students and employees.

## Florida Residency Declaration

**Etrieve's** electronic form functionality has already made a huge difference in Polk State's application and admission systems. In Florida, all incoming students must prove they are Florida residents to take advantage of the Florida in-state tuition rate. This requires each student to complete a residency declaration form and provide identification for backup documentation.

Historically this has been a laborious process for Polk State's students and their employees. The students would turn in their paper forms and those forms would have to be scanned in along with the supporting documents. It was a time-intensive, multi-step process. With **Etrieve**, Polk State has been able to create an intuitive, easy-to-use online form.

"With Etrieve, we were able to set up our online forms so students are only able to see the information they need to see, depending on what type of student they are." Smith said.

*"That's helped students understand how to fill out the residency form, and it has streamlined our process by eliminating paper. Students now complete the form online and upload their documents. Their information automatically imports into Etrieve—which is an awesome thing."*

## Moving Forward

Polk State is currently utilizing **Etrieve** in their admission, registrar, advising, academic and financial aid offices with plans to expand usage into human resources and the business office.

By expanding **Etrieve** into other departments across campus, Polk State will continue to decentralize scanning efforts and give departments more direct ownership over their content management and capabilities. New forms are being designed, as Polk State finds new and innovative ways to expand upon their utilization of **Etrieve** and their partnership with Softdocs.

## 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.*