

Through implementation of enterprise content management, Fayetteville Technical Community College improved processes within financial aid and other departments, across multiple campuses.

“The turnaround of our verification process has improved drastically. We are now able to process students’ files in days rather than weeks.”

REGINA MAHONEY

DIRECTOR OF FINANCIAL AID

QUICK FACTS

- ▶ Became a Softdocs’ customer in 2005, licensing content management, electronic forms and workflow solutions, as well as **Serve by Softdocs** for print customization and delivery
- ▶ Migrated to **Etrieve by Softdocs™** in 2018
- ▶ Currently utilizing ECM within financial aid, as well as in admissions, registration, counseling services, veteran affairs and the Dean’s office

KEY PLAYERS

- ▶ Regina Mahoney, Director of Financial Aid
- ▶ Katherine Rettig, Senior Financial Aid Technician
- ▶ Evelyn Bryant, Assistant Director of Financial Aid Operations
- ▶ Marlina Pineiro, Coordinator–Enrollment Management

CHALLENGES

- ▶ Limitations in storage space for physical and digital files
- ▶ Reliance on paper-based processes not ideal with multiple campuses and many distance learners
- ▶ Needed to improve the processing and organization of student information

SOLUTIONS

- ▶ Etrieve ECM Platform
- ▶ Serve™
- ▶ ERP: Ellucian Colleague®



**FAYETTEVILLE TECHNICAL
COMMUNITY COLLEGE**

FAYETTEVILLE, NC

Established in 1961, Fayetteville Technical Community College is a two-year, comprehensive community college serving 11,000 curriculum and 24,000 continuing education students. Comprised of two main campuses and a number of educational centers, FTCC offers around 300 associate degrees, diplomas or certificates.



At Fayetteville Technical Community College, a better student experience is found through ECM.



Before being introduced to enterprise content management (ECM), however, many departments at Fayetteville Technical Community College were quite

simply overwhelmed with paper—it was everywhere. “We were truly running out of space for our paper files,” said Regina Mahoney, director of financial aid. Not only were paper files piling up, but some documents were being misplaced or misfiled, in large part because of the amount of manual processing required.

“I’ve heard people talk about how difficult it was to locate a paper file,” said Katherine Rettig, senior financial aid technician. “I can’t imagine how hard it would be to have paper files circulating between a front office and a back office. We’d be running back and forth all the time!”

With no ECM solutions in place at the time, FTCC began scanning and saving files to compact discs and shared drives. While this did help alleviate some pressure around the storage of physical files, eventually the institution exceeded server storage limitations and additional filing cabinets began to find residence within valuable office space. For an institution with two campuses and a number of educational centers, a more impactful solution was required.

In ECM, FTCC recognized an opportunity to not only reduce their reliance on paper within processes, thus improving their speed and quality of student service, but also a chance for the institution to become more environmentally conscious.

“A number of years ago, one of our initiatives was to ‘go green,’” said Evelyn Bryant, assistant director of financial aid operations. “That certainly was a contributing factor in our decision to explore content management and electronic forms solutions.”

Moving Forward with ECM

FTCC chose to implement Softdocs’ content management, electronic forms and workflow platform as well as a print customization and delivery solution, in 2005. They have since expanded their ECM utilization across multiple departments and offices, including financial aid, admissions, registration, counseling services, veteran affairs and the Dean’s office.

Due to increasing needs for cybersecurity, upgraded e-form functionality and additional configuration options, in 2018 the institution upgraded from Softdocs’ legacy solutions to **Etrieve**. This migration allowed FTCC to enjoy complete browser-based ECM access and new, robust workflow capabilities.

Cross-Departmental Benefits

Since going live with ECM, FTCC no longer has an issue with finding space for paper files, as everything is now securely scanned and easily accessible. Marlina Pineiro, coordinator—enrollment management, commented on how integral ECM has become in FTCC’s business processes.

“We use Etrieve to manage all of our paper and the paper we receive from other institutions. As our electronic filing device, we use it every single day for every business transaction. It is a staple and a requirement.”

For an institution with multiple campuses and many distance learners, having student files and submitted forms available for employees to review and approve in real-time has become a tremendous asset. Submitted paperwork is now scanned into **Etrieve Content™** before following defined workflows, and students are increasingly choosing to submit required information through electronic forms.

As a result, it has become much easier for FTCC to efficiently provide prompt service to students both near and far. “Pre-populating student information combined with the ability to access and submit forms from mobile devices saves our students time and eliminates frustrations,” said Pineiro, “we provide a better student experience through our utilization of e-forms.”

By integrating **Etrieve** with Ellucian Colleague, FTCC’s enterprise resource planning (ERP) system, the institution has extended ERP functionality to the benefit of students and staff alike. These integrations allow ERP data to pre-populate forms with student information, reducing the risk of incorrect information being accidentally submitted.

“I don’t think our electronic forms would be nearly as helpful without seamless integration with Colleague,” said Rettig. “That’s what tells me when each student submits a required form and prompts me to review the file. It’s vital.”

“The fact that more than one person can view an electronic file at the same time has made processing so much easier. Papers aren’t being misplaced, and file organization is much better.”

Further Expansion Across Campus

FTCC also credits **Etrieve** with helping improve the awarding of VA education benefits, as the institution serves a large number of military veterans and their dependents. “The structure of **Etrieve Content** is really helping our VA. Features like advanced find, lookups, sticky notes, the easier to zoom tools and notepads are helping us make sure our records are correct,” said Pineiro. “Softdocs listens to us and continues to develop the features we need. That is the biggest benefit of our wonderful relationship. That, and **Etrieve’s** cohesive environment-which was clearly designed with the end user in mind.”

Bryant shared similar thoughts on FTCC’s utilization of Softdocs’ ECM solutions, recommending **Etrieve** to other schools looking to become more efficient.

*“I would tell anyone considering **Etrieve** by Softdocs to look at the cost-benefit ratio and the time cost-ratio. You need to consider how much time your school will save providing service to students, while also possibly increasing enrollment.”*

Evolution of Financial Aid

While long lines of students waiting to submit paper forms used to happen frequently, with electronic forms that is no longer the case for the financial aid department. “Students were literally wrapped around the hallways waiting to submit documents,” shared Mahoney. “Then, when we received their documents, we had to create paper files for each student.”

Now, students can access financial aid forms through the institution’s WebAdvisor tool. Not only can students access and submit forms through WebAdvisor, but they can also track status of submitted forms and view comments from reviewers in real-time. In the case of a financial aid denial, the student is notified immediately as the returned form becomes archived under previous activity on their login page. This allows the student to respond more quickly and provide any additional information required.

Pineiro commented on how ECM has impacted financial aid, “With Etrieve Forms built into our WebAdvisor piece, our financial aid office is positioned to be there for our students, including our distance learners. We process student records more quickly, and have increased our awarding of financial aid.”

Electronic financial aid forms are also capable of pre-populating based on how previous questions were answered. Having forms that automate in real-time has helped reduce any confusion from a student possibly answering a question that was not required of them and has drastically reduced processing times.