

Glen Oaks Community College Improved Processes of Early Middle College and Dual Enrollment with Implementation of Etrieve by Softdocs™.

“While we originally selected Etrieve as a tool to digitize years of Student Services records, it has become a true game changer for our institution—enabling us to integrate electronic forms and workflow automation with the data of our Ellucian ERP.”

JULIE COTTIN

ECM ADMINISTRATOR

KEY PLAYERS

- ▶ Julie Cottin | ECM Administrator
- ▶ Evan Dembskey | IT Director

KEY SYSTEMS

- ▶ Ellucian Colleague | Enterprise Resource Planning Solution
- ▶ Etrieve | Enterprise Content Management Platform
 - Etrieve Content, Etrieve Forms, Etrieve Flow, Etrieve Forms Builder

GLEN OAKS’ KEY ELECTRONIC FORMS INCLUDE

- ▶ Accommodation Eligibility Notifications
- ▶ Allied Health Master Competencies Checklist
- ▶ Application for EMC-DE-CTE
- ▶ Course Master *currently being implemented*
- ▶ Educational Development Plan for Early Middle College
- ▶ Food Pantry Application/Reorder *currently being implemented*
- ▶ Housing Forms
- ▶ Registration and Change Schedule
- ▶ Scholarship Applications
- ▶ Work Study/Tutor Timesheets



**GLEN OAKS
COMMUNITY COLLEGE**

CENTREVILLE, MICHIGAN

Student FTE: Approximately 1,200

Areas Leveraging Etrieve Include:

- Academics
- Admissions
- Advising
- Allied Health
- Business Office
- Curriculum Committee
- Dual Enrollment
- Early Middle College
- Financial Aid
- Housing
- Human Resources
- IT
- Nursing
- Registration
- Student Services
- TRIO



An initiative for records digitization yielded significant campuswide operational transformation, as departments began leveraging the Etrieve platform to digitize paper-based forms and processes.



After an extensive analysis of alternative Enterprise Content Management (ECM) solutions, Glen Oaks Community College chose to move forward with a phased

implementation of Etrieve by Softdocs. The first priority was digitizing all records within Student Services, which they quickly achieved. In close coordination with Softdocs, the Glen Oaks implementation team's early efforts also included rapid roll-outs within Admissions, Advising, Dual Enrollment, Early Middle College, Financial Aid, Housing, Registration and TRIO.

Continued expansion of ECM utilization took the form of a second implementation phase, as additional departments expressed interest in going live with Etrieve's browser-based document management solution, in addition to electronic forms and automated workflow. Phase two included Human Resources, the Business Office, Academics, Allied Health and Nursing, as well as the Curriculum Committee and several clubs and organizations across campus.

In a relatively short time, the majority of the Glen Oaks campus was live on Etrieve. Electronic forms were being designed and rolled out, improving the efficiency by which processes were being completed throughout the institution.

A New-Look EDP

With over half of the institution's student population participating in Early Middle College or dual enrollment, the impact of shifting to electronic forms and automated workflows has proven particularly significant within these two programs. A key piece to the success of both is the Educational Development Plan (EDP). At Glen Oaks Community College, each program has a single director—whose responsibilities include ensuring each EDP remains a living document that is continually updated to accurately reflect the learning path of the participant.

“The state of Michigan requires each high school to have a person overseeing the authorization of forms for Early Middle College and dual enrollment—forms including Registration, Change of Schedule and the EDP,” said Julie Cottin, ECM Administrator at Glen Oaks Community College. “Before digitizing these paper forms with Etrieve, much of our directors' time was spent traveling to and from schools, trying to gather signatures, process forms and keep track of each student's progress.”

“From learning track to which courses they'd like to take; students change their minds. E-forms and workflow automation have given our processes the needed agility to make the system work for our staff. And we began with the EDP.”

The newly-digitized EDP tracks 5 years of high school and college courses over 13 semesters and includes student name, high school, cohort year, catalog year, career pathway, placement test scores as well as other information and comment areas. Students can conveniently view their EDP through their browser window of choice, while parents are given online view access. High school counselors and the authorizers can easily view or edit the EDPs of their students, while college advisors and EMC staff have real-time access as well. Student ID numbers can be used by advisors and staff to quickly locate EDPs they need to review, edit or approve. Data can be easily filtered by year. Updated forms are sent through user-directed routing to academic directors for review and approval, while conditional actors and integration routes the form to the appropriate high school authorizers.

In addition, Glen Oak's new EDP process leverages other e-forms, ViewModel coding, data table integrations and role/group settings within Etrieve to provide needed functionality and access rights. For instance, a Parent Access Form (completed by the parent), ties parents to their student(s), enabling them to log in to Etrieve using third-party authentication, to review their student's EDP and have other forms routed to the parent when a parent's signature is necessary. ViewModel coding matches EDPs to the user that is logged in, pulls and updates data, grants access according to defined user groups and hides other areas as needed. Key integrations are supported by group/role settings within Etrieve, ensuring EDPs are only sent and viewable to the appropriate people.

Program directors have been able to greatly reduce the time and resources required to communicate with their 18 partner schools/organizations, as EDP approval leverages conditional actors and integration. Upon completion of its workflow, and once all approvals have been received, the current version of the EDP returns to Glen Oaks' EMC group for archival.

Accommodations Eligibility Notifications

Another prime example of how processes have been impacted by Glen Oaks' utilization of ECM is the institution's reimagined approach to Accommodations Eligibility Notifications. Previously paper-based, this multi-part form proved to be quite tedious for faculty and staff. Having to be completed every semester for each student and for every course in which they were enrolled, it often took weeks for instructors to receive the necessary information on documented special needs of their students.

Now, the OSSD advisor can access an electronic form, select the semester, enter the student's name and use the included checkboxes to specify any needed accommodations. Using multiple conditional actors, a submitted form can forward needed information to up to seven different course instructors, greatly reducing processing time and effort.

For privacy and security purposes, when a course instructor views the Notification, precautions are taken to ensure that the form's history and all hidden fields are not revealed inadvertently through downloading or printing. Robust data table integrations ensure only the appropriate people view the forms and ViewModel coding insures the appropriate fields are displayed to each user, preserving all privacy settings. And once an instructor views and approves the form, it automatically files to the student's record within Etrieve for convenient, anytime retrieval by approved viewers.

"Not only did Softdocs help us quickly create the right solution for the business process we were looking to strengthen, but they continue to be the perfect partner as we roll out new forms and workflows, fine-tuning our work to ensure every need is met."

Allied Health Master Competency Checklist

Glen Oaks' Allied Health students must demonstrate a mastery of over 100 competencies in five classes. Prior to Etrieve, the institution used paper forms to track the progress of each student. Allied Health instructors were obligated to update manual, paper-based student checklists, and students wishing to view their checklist would have to do so in person.

As an Etrieve electronic form, instructors can now submit updates from their offices or homes, and students are free to view/download their checklists on demand. If and when the Accreditation Committee needs to view any information, Allied Health staff have ready access to Master Competency Checklists, and can promptly share the information. Students are also choosing to include their checklists in their prospective employer portfolios.

Thoughts on Transformation

"Even as our utilization of ECM continues to transform our business processes, our understanding of the role ECM can play on our campus is evolving," said Cottin. "We roll out a process improvement, and people quickly realize that, in addition to being able to access information more quickly, they can add information as well. The original improvement is modified and together we craft a new approach that better serves our staff and students."

Electronic forms and workflow automation is allowing the institution to efficiently aggregate data, and a central content repository means that not only do coordinators no longer have to run around collecting data, but searching for hardcopy files has also become a thing of the past.