Education

Written by Laserfiche Staff

Each day, students submit a number of documents—from aid applications, scholarship acceptance letters and promissory notes to copies of birth certificates, passports and tax returns—to the University of Utah's Department of Financial Aid & Scholarships. Prior to installing Laserfiche, staff spent hours sorting, routing and filing these forms—and service suffered as a result.

IT staffer Jeramy Berry describes the tedious process the department used to follow. When documents were received, staff sorted them by type and handed the separate piles to data entry personnel. These staff members then separated the documents into two further piles: those that were missing information and those that were complete. Documents with missing information were carried to a "pending" basket in another part of the department. Completed documents were sorted into still smaller piles, based on each student's ID number. Staff then processed these documents and placed them in the file cabinet drawers assigned to the department's financial aid counselors, who retrieved them throughout the day. When the counselors had finished with the documents, they sent them to the file room, where clerks would sort the documents yet again and, finally, add them to the appropriate students' folders.

"Because documents could be at any point in this process, they were difficult to find, which often gave the impression they'd been lost," Berry explains. "We'd ask students to stop by our office to fill out incomplete paperwork, but when they'd come in, they'd have to wait while staff went to look for the documents we'd contacted them about." He adds that storing all of this paper required a significant amount of space, given that the university must retain documents for seven years following the student's graduation. "Because we'd filled up our own file room, we had to store older files in another department—and we had stacks of paper all over our office," he says.

The department's IT staff began researching digital document management systems with the goal of eliminating this massive paper archive and of finding a more efficient way of routing documents among staff members. In Laserfiche, they found all the functionality they were looking for. Laserfiche enables the department to store all of its documentation electronically, while the system's comprehensive search tools help staff quickly find what they need. Perhaps most importantly, the Laserfiche Workflow™ module has fully automated document routing processes, eliminating the need to carry documents from one part of the department to another.

Now, when the department receives a document, staff scan it into the Laserfiche repository, where it's stored as an archival-quality TIFF file. They then apply a digital template to the document and enter key metadata, including the student's name, ID number and social security number. Finally, they use the template's Status field to instantly route the document to data entry personnel.

Once data entry staff have processed the document, they update the Status field. The Workflow module then routes the document to the correct financial aid counselor—automatically. "We've always assigned cases to financial aid counselors based on the last two digits of the student's ID number," Berry explains. "For example, IDs ending in 00–07 go to Counselor A, IDs ending in 08–22 go to Counselor B, etc. In the past, staff had to manually sort documents into separate piles for each counselor—a process that was both tedious and prone to error. Now, Workflow 'reads' the student ID number entered in the template field and automatically routes the document to the right counselor."

When the counselor has finished with the document, he or she sets its Status field to "Complete." The document is then stored in the Laserfiche repository, where staff can locate it using the student's name, ID number, social security number or other search criteria. Even though the department has over a million documents in its repository, searches take only seconds.

Berry estimates that Laserfiche has helped the department reduce processing time by two-thirds, meaning that students receive aid and scholarship money much sooner than they used to. "In the past, it would take us at least six weeks to process a student's paperwork. Now, thanks to Workflow, we can process the documents in two weeks," he says. Laserfiche has also made it easier to respond to information requests from other university departments. Instead of having to search for, photocopy and then hand-deliver the requested document, staff can now quickly e-mail it from within Laserfiche.

In addition to making information more accessible, Laserfiche has also made it more secure. "Every day, we receive documents that contain sensitive information, including students' social security numbers," Berry says. "In the past, these documents were 'floating' all over the office—stacked on people's desks, piled on top of file cabinets or sitting in people's inboxes. Now, all of these documents are stored in Laserfiche, and only authorized staff members can access them."

Increasingly, students submit documents to the department in electronic format, and Berry says that Laserfiche helps staff manage these documents as well. Laserfiche offers multiple methods of importing electronic files—from Microsoft® Word® documents to PDF and JPG files—into the repository, where they're stored in their native format. Alternatively, staff can use the Laserfiche Snapshot™ utility to quickly create TIFF images of the electronic documents, which they can then process in the same way they handle scanned documents.

Looking forward, Berry would like to install the Laserfiche Quick Fields™ module, which eliminates manual data entry by automatically capturing information from a document and copying it to the relevant template field. Given everything the department has already accomplished, Berry doesn't doubt the success of this initiative.

"Thanks to Laserfiche, we no longer have to search through stacks of paper to find documents. We no longer have to manually sort documents and carry them to someone's inbox. We no longer have to search for lost documents and misplaced files," he says. "Most importantly, we've greatly reduced the amount of time we needed to process documents—meaning we can disburse money to students a lot more quickly than in the past."

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