University of Kansas Financial Aid

University of Kansas (KU) financial aid office, Perceptive Content automatically updates admissions checklists in PeopleSoft, dramatically reducing the time and resources associated with managing the check-in process. The solution also provides instant content access, giving staff the information they need to respond more quickly to student inquiries.

Challenge

Looking to optimize workflow & save space

Most large public universities house and manage a vast amount of paperwork, files, and data within their financial aid departments, and KU is no exception. Last year, approximately 18,000 students received some form of financial aid, and the department processed nearly 500 financial aid-related documents per day. The sheer volume of paperwork requires significant storage capacity, as the university must store 60,000 files representing a five-year period after each student's last term of enrollment. When the Financial Aid department was told they needed to vacate their primary storage area due to a scheduled renovation in the Bursar's Office, it prompted a search for a technology solution to house the vast amount of documents and information.

In addition to a physical reduction in storage space, the university knew a process and content management solution could accelerate workflows and reduce manual tasks, which in turn would optimize staff resources. Along with storage space and workflow challenges, Financial Aid staff needed a way to quickly and easily access information from a user-friendly, secure repository. With these needs in mind, the university chose Perceptive Content from Lexmark, which integrated seamlessly with the department's existing PeopleSoft application. Almost immediately, staff realized the benefits of no longer having to search for files in multiple buildings across campus.

"If someone was looking for a file, or if they had one on their desk, we spent a lot of time running around trying to find that file. Perceptive Content solved this problem beautifully," says Linda Gerdes, Administrative Professional, Provost Business Service for Financial Aid & Scholarships.

Solution

After the successful deployment of Perceptive Content to address storage needs, the university turned to the solution to address workflow issues associated with the check-in process of verification documents. Before deploying the solution, the review of verification documents included several time-consuming steps: ensuring that student ID's were listed on the verification documents, passing documents to scanning staff to enter into the workflow, updating the checklist, adding comments and routing documents into the review queue.

Meet the University of Kansas

The University of Kansas (KU) was founded in 1866, shortly after the end of the Civil War. Today, KU is a major public research and teaching institution with 28,000 students and 2,600 faculty and staff spread over five campus locations. Within 13 schools, KU offers 345 degree programs in 200 fields of study, attracting students from all 50 states and over 100 countries. KU's special education and city management urban planning programs have also received a prestigious #1 ranking by U.S. News & World Report.

- ▶ **Founded:** 1866
- ▶ **Location:** Lawrence, KS
- ▶ **Enrollment:** 28,000
- ▶ **Faculty & Staff:** 2,600

Products in use: Perceptive Content, Perceptive eForms

Integration: PeopleSoft

Lexmark™

Improving check in and load balancing during peak season

With Perceptive Content, once the documents are scanned, they are assigned a specific document type. The solution then automatically updates the checklist in PeopleSoft to indicate which documents have been received, dramatically reducing the time and resources associated with managing the check-in process.

"Our staff has heavy workloads," says Janet Roecker, Associate Director, Financial Aid & Scholarships. "Adopting Perceptive Content to manage documents has allowed us to remove some manual processes from staff, so they can be freed up to do other tasks."

Roecker anticipates even greater time savings during the peak enrollment period of February, March and April, when hundreds of documents flow into the Financial Aid department on a daily basis. The acceleration of this workflow, combined with the capture and housing of confidential data in a secure repository, will transform the way the department manages everyday processes, with an anticipated time savings of 250 hours for the verification process alone.

Results

E-forms efficiency

In addition to reclaiming storage space and simplifying document verification, Perceptive eForms from Lexmark add even greater efficiencies to the financial aid process. Traditionally, students submitted paper copies for most of their required forms, and staff members would manually log the paperwork and faxes, and physically distribute the documents around campus. By moving from paper to eForms, the average time savings in the department is 75 hours, or almost two weeks of staff time, based on 4,500 forms received each year.

Another benefit in switching to Perceptive eForms has been increased accuracy of data captured on forms, delivering even more time and resource savings to the department. Since certain eForm fields are required, students cannot submit an incomplete form, and staff members are better able to help students get questions answered prior to submission. Using eForms also fits the lifestyle and expectations of students, as they have a high comfort level with technology and expect to interact with information in real time.

According to Roecker, "Students want things quickly, easily and online. With Perceptive eForms, they don't have to go to the website, download a PDF file print it, fill it out and then find a way to get it to us."

Improving student service and satisfaction

One of the most important benefits the university has realized after deploying Perceptive Content was improved student satisfaction. Before deployment, students often had to travel between departments and buildings in search of answers on the status of a financial aid application. Instant access to documents and information directly from any desktop gives staff the information they need to respond more quickly to inquiries, which builds a more positive relationship between staff, students and the university.

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Janet Roecker
Associate Director, Financial Aid and Scholarships, KU

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