Wofford College Leverages Banner® Document Management Suite and Web-Based Applications to Totally Redesign and Streamline Admissions and Financial Aid Processes

Most institutions that use document imaging solutions quickly realize the tried-and-true benefits: reduction in costs for paper and postage, freed up office space that is no longer used for storing hard-copy documents, and improved access to information. However, imaging solutions also have the potential to improve overall business processes. After using the Banner Document Management Suite (BDMS) for four years, Wofford College in South Carolina has been able to radically redesign its admissions and financial aid processes, resulting in dramatic reductions in staff workload.

"It takes several years to get through the transition to imaging before you can really understand the potential benefits," explained Boyce M. Lawton, III, Ph.D., vice president for Academic Administration and Planning at the college. "By adding web-based applications to our imaging solution, we have been able to really change and improve our business processes. Today, we have a global view of how information moves and impacts different offices and we have really improved productivity and customer services as a result. The more we get into our imaging solution, the more opportunities for gains we see for it."

Wofford College uses the Banner administrative suite for all its administrative needs. Several years ago, the college implemented the Banner Document Management Suite, which is an imaging and document management solution suite that launches documents and content directly from Banner. With this integrated solution, college staff can securely access business documents such as admissions materials from within their familiar Banner environment, eliminating the costs of paper management and the maintenance of an external imaging system. The college has leveraged the power of the imaging solution by integrating web-based applications to it.

The Business Office was the first department to use the Banner Document Management Suite. "The office wanted a way to call up an exact image of a bill," recalled Lawton. "Parents would call and say, 'I'm looking at line 6. What does that mean?' But the office could only see the balance online. They would have to go pull the physical bill out of a filing cabinet before they could answer the question."

Wofford College
Enrollment: 1,400
Spartanburg, SC
www.wofford.edu

Results With Banner Document Management Suite:

- **Admissions process has been redesigned and streamlined**
- **Portion of financial aid awarding process has been automated**
- **Admissions office has been able to keep pace with a growing enrollment without adding staff**
- **Paperless offices support college's commitment to be environmentally friendly**
- **Complete student information is available immediately from desktops; files and documents are no longer misplaced**

To remedy the issue, Wofford implemented FormFusion from Evisions along with the BDMS. FormFusion is a document enhancement and distribution suite that eliminates pre-printed forms, enhances printed output without modifying code, and can send documents to students, vendors, and employees electronically. FormFusion allows staff at Wofford College to send bills to the printer and into BDMS all in one process. The application stores the document as a PDF in BDMS. "Now, when someone calls with a query, the business office can call up a duplicate of the bill from their desktop. It's as if they are looking at the actual bill," said Lawton.

The Financial Aid Office eagerly adopted the solution next. "The office was swamped with paper -verification forms, tax forms, and all the applications and supporting documents," recalled Lawton. "It was hard for them to quickly access the information they needed."

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Initially, one person was designated to scan the massive backlog of forms into BDMS. Today, incoming documents are scanned as they enter the office. Then, they are shredded and then recycled. All filing cabinets were soon removed, freeing up an office in the 150-year-old building.

"Now, all the information is available on screen, and can be annotated on screen, too. Moreover, the data is more secure than it ever was before with paper, and it's completely disaster proof. We back up the data nightly and send it offsite. We won't lose the information if we have a fire or flood in that building," said Lawton.

When the vice president for enrollment management saw the impact of the imaging solution in Financial Aid, he was eager to have the application implemented in the Admissions Office. Today, that office is also completely

paperless, and a second room was freed up in the process. Transcripts, forms from high school guidance counselors, and other documents are all scanned and placed into the student's electronic file. Axiom from SSD makes it possible for data from hand-printed applications, e-forms, and tape loads to be loaded directly to Banner and BDMS. SSD and Evisions are both members of the SunGard Higher Education Collaborative which is designed to deliver proven technology products and services, with reliable integration, to colleges and universities.

Because the admissions office is totally electronic, the college has been able to completely restructure the application process. Before, counselors had to read each application for admissions and record their decisions. Now, because all the data is web-based and easily accessible, people other than counselors read the applications. These "readers", who all have master's degrees, have been trained extensively in the evaluation process. From off-campus sites, they can evaluate applications and make decisions about them. In addition, staff can view transcripts that are scanned in when transfer students are accepted at Wofford.

"The combination of our web application and BDMS allows our readers to access all the data from outside the office. They read the entire file and make the decision to accept or decline. We have outsourced this time-consuming task and freed up our counselors to make more face-to-face contact with our constituents," said Lawton.

Once decisions are made, they are automatically batched and sent to the Banner Student system. (Before, a staff member had to open each individual student record and enter the decision.) When the decision is entered into Banner Student, it automatically alerts the Financial Aid office and starts an automatic process for rewarding.

Based on a high-level matrix of standard awards created by the college, the process automatically places students in the appropriate category of financial aid that he/she is eligible for. This saves a staff member the time of looking at each request and categorizing it. From this point, staff members review all applicants one at a time and make adjustments as necessary.

"The time savings from entering packaging information one-by-one versus 'cleaning up' just 10 to 20 percent of the awards is phenomenal," said Lawton. "It frees up staff members to spend more time thinking and talking about individual students rather than just processing information. Equally important, because all data resides in Banner, the college is now able to evaluate and better predict 'yield and take' on offers of admission and offers of financial aid."

The paperless trail extends throughout the financial aid process. For example, recipients are sent links with information about their awards via email; and even early estimator forms are available online.

"We simply don't send out paper anymore," emphasized Lawton. "We are saving money on paper and postage, and supporting our college's desire to be more eco-friendly. And by changing our business processes – built on document imaging and web-based applications - we have been able to keep pace with a growing enrollment of 30 percent without adding staff. "

Students can check the status of their application process online by accessing the college's portal which is built on the Luminis® Platform which provides portal and web services delivery capabilities, collaboration and communication tools, a common single sign-on interface and branding to the entire digital campus. Applicants can see whether they still need to provide any documentation and view their accept/deny status. To further its enrollment efforts, Wofford College also has implemented the Banner Recruiting & Admissions Relationships solution, part of the Banner Enrollment Management Suite. The suite addresses the interrelated phases of planning, executing, and measuring an institution's enrollment management efforts. Wofford College is the first institution in the state of South Carolina to implement the solution.

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Now that the college has seen firsthand the dramatic gains provided by the Banner Document Management Suite, it is making plans to implement it in other departments, including the Development Office. Next, the college plans to use it to improve documentation of assessment policies. "Right now, we have file cabinets full of staff evaluations. We want to start using BDMS to track when someone is evaluated, and then scan in their evaluations. This will be a real asset to us when it is time for accreditation," predicted Lawton.

The ease of access to information, and the integration of the imaging solution to Banner, make it a real asset to the college. "The solution has increased the confidence of the president's staff in the data," said Lawton who is a member of the president's staff. "We no longer 'guess' at information; all the data is at our fingertips. Because

of the integrated system, we can combine data from different areas of the college into individual, unified reports. Banner gives us confidence that the numbers we use for decision making and outside reporting are accurate and consistent. We also use the vast information available in the Banner system to perform predictive modeling for future college operating decisions.

"There has been a collective wonderment around the campus at how BDMS and our web-based applications have improved processes," summarized Lawton.

A Step-By-Step View of Wofford's Redesigned Admissions and Financial Aid Processes

- Recruiting information is entered via Axiom web or scanned in with Axiom.
- All test score information (SAT, ACT) is loaded electronically.
- Geo-demographic ratings (third party) are loaded electronically into selective admissions ratings screen.
- Application information is loaded electronically through Axiom into Banner and Banner Document Management Suite (BDMS).
- Admissions officers rate applications via a web application while simultaneously viewing the application in BDMS.
- Admissions directors use ratings to create decision on web application.
- Application decisions are loaded into Banner daily. Wofford previously touched each applicant's record one at a time.
- Financial Aid office uses applicant rating score and other information to auto-package merit- and need-based aid to cover the "easy 80%" of applicants. From this point, the college reviews all applicants one at a time and makes adjustments as necessary. The time savings from entering packaging information one-by-one versus "cleaning up" 10-20% of the awards is phenomenal.
- All financial aid data is collected online through Axiom Web, downloaded from the feds (ISIRs), or scanned into the system using BDMS.
- Recruiting coaches receive daily emails (automated through college's enterprise reporting system) listing all financial aid documents still needed to complete the financial aid process for each team member/recruit.
- All correspondence from financial aid is electronic (to both parents and students) and compliant with security and FERPA guidelines.
- Award packages are viewed online.
- Upon completion of high school, high school transcripts are scanned via BDMS and then shredded (freeing much room in the registrar's vault) and viewed online for proper placement in language courses.
- Copies of all bills to students are simultaneously printed and sent directly from FormFusion to BDMS, allowing access to all copies of a student's bill at any time.
- Directors and VPs automatically receive daily emails with charts and crosstabs showing all deposits by gender, race/ethnicity, state, public/private, average ACT and average SAT.
- Directors receive similar daily emails indicating where all applicants are in the admissions process so they can quickly see how many females/early decision/out-of-state students/scholars are currently incomplete/complete/accepted/denied/deferred/deposited etc.