

Document Imaging and Workflow:

A Student Service Solution

Presented by:

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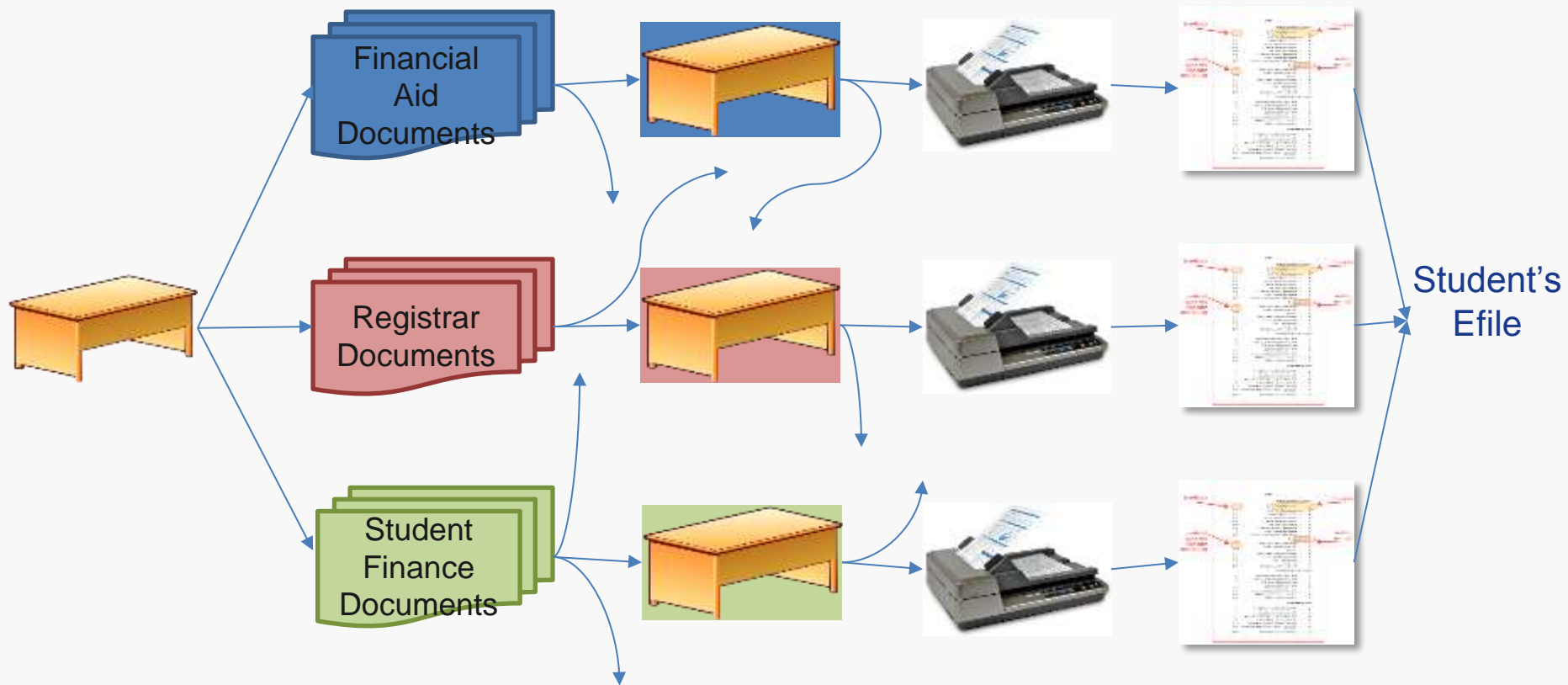
Where did that form go?

- Students were dropping off forms, and when they called later, no one could find them.
- Staff lacked confidence that paper was being routed properly.
- Needing to admit to parents we misplaced a form was especially uncomfortable.

The existing process

- Documents were dropped off and placed in a folder for the corresponding department.
- Documents were picked up by the department as needed.
- Documents were taken for use before they were scanned, and often never put back to be scanned. We had the document, but nobody knew where it was.
- Once documents had been removed from the process, they might never make it back to be scanned.

How things used to be -



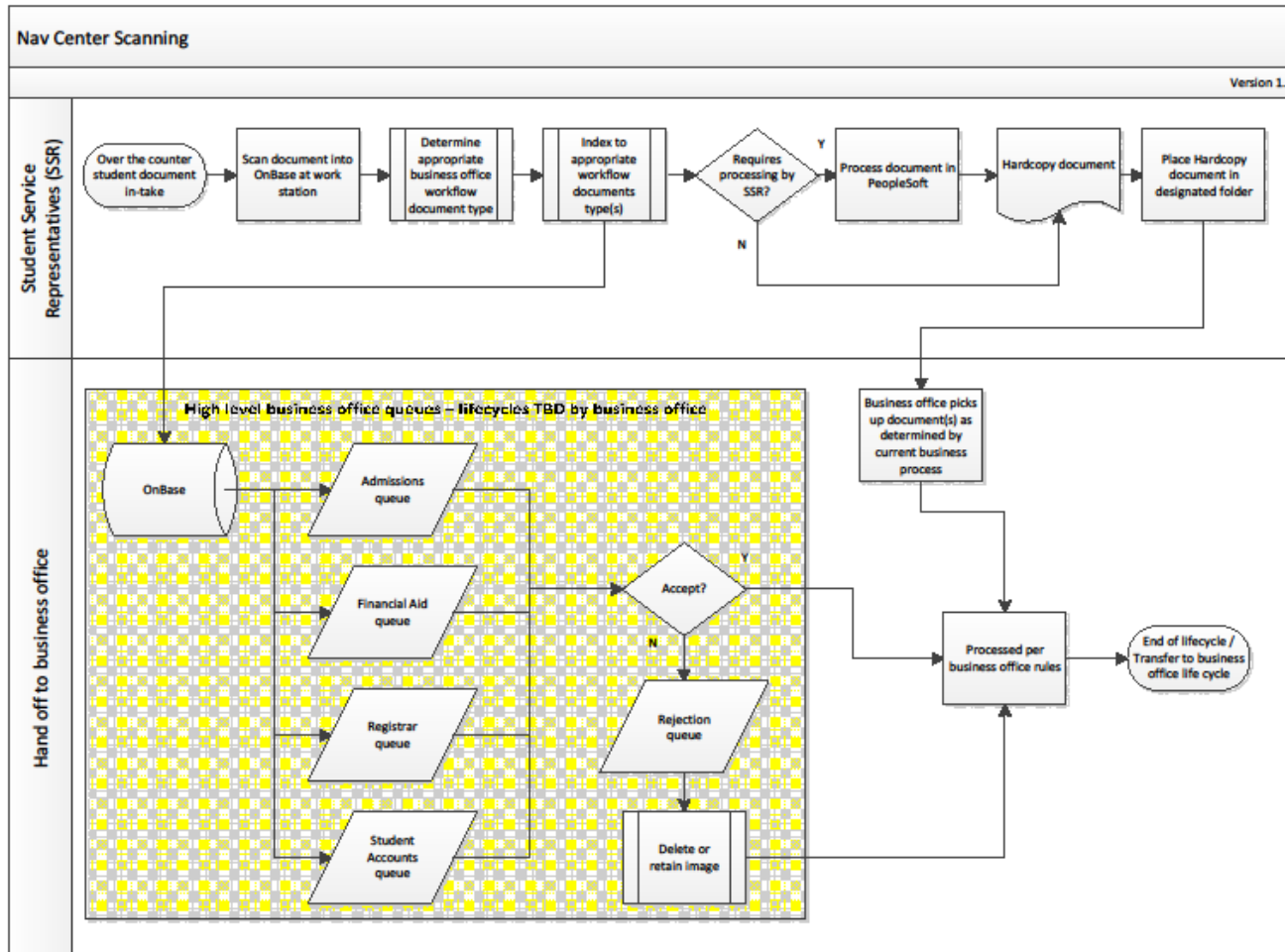
Discovery & development

- Met with stakeholders at all levels to discuss processes
- Mapped processes for each office
- Revisited offices to review mapped process and edit as needed

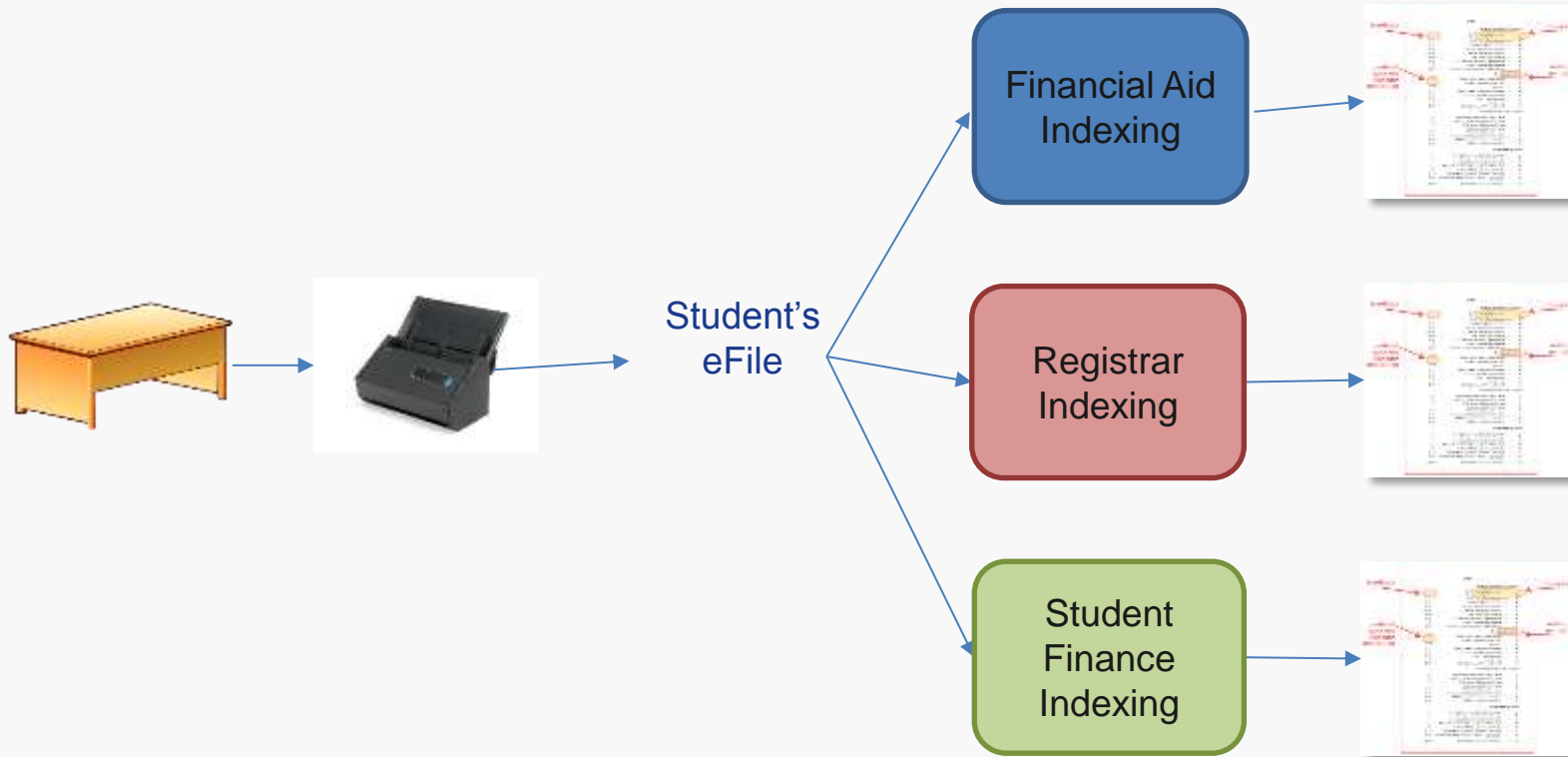
The new process

- Documents are scanned individually as they are dropped off at the service counter.
- The documents are scanned as a generic document for each department. Each office has an indexing queue in order to do final indexing.
- Documents can be seen by all users who need them as soon as they have been scanned.

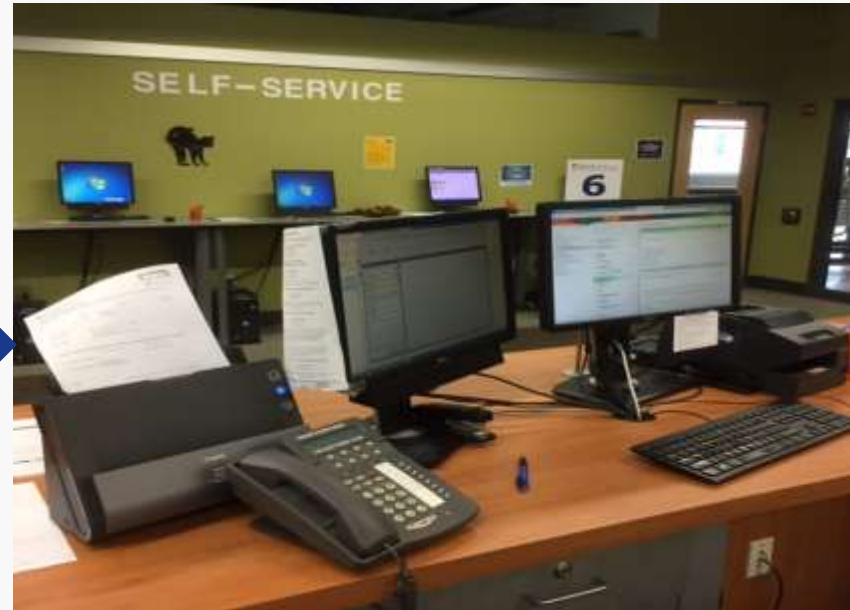
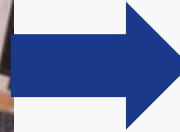
New process – Full diagram



The new process -



Solution



Solution

- Financial Aid
 - Documents received over counter
 - Documents received via email
- Student Accounts
 - Documents processed
 - Documents unprocessed
- Registrar's Office
 - Documents processed
 - Documents unprocessed
- Transfer Services
 - Official transcript received over counter

The screenshot shows a web application interface for document retrieval. At the top, there is a 'Document' tab with a dropdown arrow, a star icon, and a help icon. Below this is a 'Document Retrieval' section with a dropdown arrow. The main content area is divided into several sections: 'Document Type Groups' with a dropdown menu set to 'NAV Center'; 'Document Types' with a list of document types including 'NAV - FIN Docs In', 'NAV - FIN Email Attachments In', 'NAV - Plan of Action', 'NAV - Rejected from Workflow', 'NAV - SF Docs In', and 'NAV - SF Nav Processed'; 'From Date' and 'To Date' fields with calendar icons; and a search section with tabs for 'Keywords', 'Text', and 'Note'. The search section contains four input fields with labels: 'EMPLID', 'First Name', 'Last Name', and 'MI', each followed by an equals sign.

Solution

The screenshot displays a software interface with a toolbar at the top containing the following buttons: Change Layout, Close This Layout, Secondary Viewer, Refresh, Apply Filter, Auto Work, Override Auto-feed, Route Item, Take Ownership, Release Ownership, Execute Script Task, Index Student Accounts Document, Reject - Bad Scan SA, Reject - Unidentified SA, Reject - Incomplete SA, Reject - Other Reason SA, Reassign to Financial Aid, Reassign to Registrar, and Reassign to Clipper Card. Below the toolbar, a dark grey bar highlights a set of six buttons: Reject - Bad Scan SA, Reject - Unidentified SA, Reject - Incomplete SA, Reject - Other Reason SA, Reassign to Financial Aid, and Reassign to Registrar. The main content area shows a document viewer with the T-Mobile logo and the EdAssist logo. The EdAssist logo includes the text "EdAssist SMARTER EDUCATION MANAGEMENT" and "A Bright Horizons Solution at Work". A handwritten signature "CAS" is visible in the top right corner of the document. On the left side, a sidebar lists several document categories: Rejected Clipper Card Documents (1), SR_Residency Appeals, SS_NF Document Search, SS_Transfer Services Document Monitoring, and SS_Transfer Services E-form Monitoring. The text "Application Number:" is visible at the bottom of the document viewer.

Challenges

- User Acceptance
- Training
- Identifying business processes
- Securing executive sponsorship

Successes

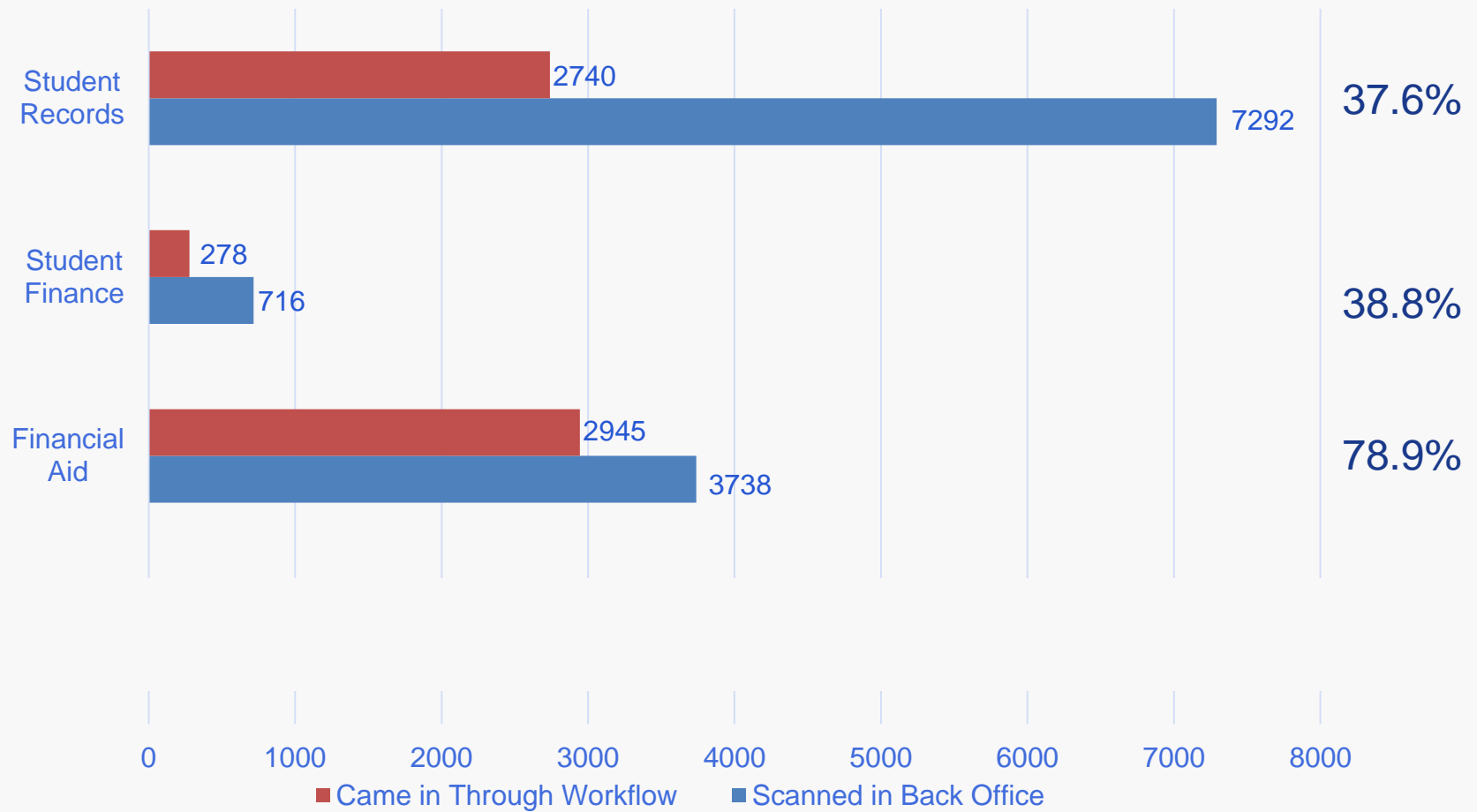
- Increased value from skilled employees
- Reduction in student staff since only need to index
- Better communication to students
- Transparency in the process which improves service
- Scalable model
- A “green” process
- NEVER lose a document again!

Statistics

- 20,196 – Number of documents were scanned in the Nav Center
- 42% - Percentage of all documents come through the Front Desk
- 20 hours - Average time for a document to be processed, including nights and weekends
- 6.6 seconds – The fastest a document was processed by a back office

Statistics

Document Intake Summary



Future Development

- Expanding across university
- Summer Bridge Academy in conjunction with Financial Aid
- Readmit process with Center for Academic Excellence, Advising, and Registrar
- Plan of study updates from the School of Graduate Studies to the Registrar

Questions?

Thank you!

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