



Electronically Streaming Workflows

Denise Sebastian – Mineral Area College

Brice Baumgardner – Hannibal-LaGrange University

Karen Thompson – Lincoln University

Mineral Area College

Denise Sebastian

Employed in Financial Aid Since 1989

Financial Aid Director Since 1996

Small Rural Community College

3800 Headcount

3725 Students With Valid ISIR

1457 Selected For Verification By USDE

Total Staff of 4 – 1 Primarily Responsible for Verification (also has other responsibilities)



Paper to Paperless In Three “Easy” Steps

PowerFAIDS 2008

Document Imaging 2010

Student Forms 2015



Where We Came From

Paper Based Verification System
One Staff Member Assigned
Overwhelming – Error Prone – Frustrating
Gotta Be a Better Way



Where We Wanted To Go

Electronic Process
Document Submission
Student/Parent Signatures
Retain Completion of the Review Process
Flat Fee vs Transaction Based Fee



How We Got There

Google

Request for Proposal (Sent 2 Out)

\$\$\$ Funding




Implementation

Start Finish Five Days


Initial Set Up – Testing - Production



Student Forms – Campus Logic



Mineral Area College
Serving Communities Since 1922

 **Secure Login**

Username [Forgot Username?](#)

Password [Forgot Password?](#)

Login

Parent user? [Log in here.](#)
By using the site, you agree to the [Terms of Use.](#)
Don't have an account? [Create Account.](#)



Household Form

Transaction:	2016 - 2017 Transa... ▾	Student IRS DRT Code:	05	Dependency Status:	D
Status:	Reviewing uploaded document(s)	Student IRS Display Flag:	B	V Group:	V1
Created on:	08/10/2016	Parent IRS DRT Code:	00	Comment Codes:	149 170 349
View Current ISIR		Parent IRS Display Flag:	M		001 118 361
				EFC:	006 2

File Review **Student View**

Congratulations!

No action is required while the Financial Aid Office is reviewing your file. You may view documents that have been submitted by clicking on the links below.

Contact the Financial Aid Office with any questions.

▾ Household Form✓

You were selected for a process called verification by the Department of Education. You will need to verify certain information you reported on the Free Application for Federal Student Aid (FAFSA). In [Read More](#)



Upload Documents

✔ Household Form ? [View Form](#)

Download	Date Filled Out
2016-2017 Dependent V1 Household Web Form.pdf	08/11/2016

✔ Congratulations! This form has been E-Signed and may now be submitted for review.

✔ Upload Student's 2015 IRS Tax Return Transcript. ? [+ Add Page\(s\)](#)

Please note that you must provide the appropriate tax return transcript from the IRS. 1040 forms are not acceptable in most circumstances.



File Review

ISIR Fields	ISIR Value	Document Value	Document Type	St
Student's Type of 2015 Tax Form Used?	IRS 1040A or 1040EZ	IRS 1040A or 1040EZ	Student's 2015 IRS Tax Return Transcript	▲
Student's Tax Return Filing Status	Single	Single	Student's 2015 IRS Tax Return Transcript	
Student Eligible to File 1040A or 1040EZ?		Yes	Student's 2015 IRS Tax Return Transcript	
Student's Adjusted Gross Income From L...	5214	16404	Student's 2015 IRS Tax Return Transcript	
Student's U.S. Income Tax Paid	546	606	Student's 2015 IRS Tax Return Transcript	
Student's Exemptions Claimed	1	1	Student's 2015 IRS Tax Return Transcript	
Student Income Earned From Work	5214	16404	Student's 2015 IRS Tax Return Transcript	
Spouse's Income Earned From Work			No Documentation Provided	



Complete Verification

Corrections?

Next Steps

Complete Verification Notes in Powerfaids

Ready to Package



Closing Remarks

Integration Options

Document Storage Options

Flexibility

Excellent Customer Service & Technical
Support



Hannibal-LaGrange Univeristy

Brice Baumgardner

Director of Financial Aid

PowerFAIDS – FAM (for a little while longer)

Docuware – Document Imaging



Paper to Paperless in

...

Some steps.....

Some steps were dirty and stinky

Some were fairly easy

Some took the boots right off of your feet



Where We Came From

All paper to everyone for everything



Where We Wanted to Go

Less paper to less people less often



What We Got

Less paper to less people less often

An electronic workflow

New challenges to work through



What is Left

Paperless forms (just a few)
Working through a new year
Figuring out if it worked



Lincoln University

Karen Thompson

Enrollment Services Technical Coordinator

Colleague

Dynamic Forms

Hyland OnBase



Where We Came From

Paper, Paper, Everything Paper
Staff insisting everything be printed
Manually routing items for review



Where We Want to Go

Implementing Document Management –
Hyland OnBase

Streamline business processes
Allow parents to complete forms
electronically



Challenges

Technical support internally
Staff still insisting on paper



Improvement Made

- Award Modification notice from counselor making adjustments, to staff member responsible for transmittals, and then to Student Account Director to review account.
- Work in Progress

