

Case Study

University of South Florida

University of South Florida turned to Cardiff TeleForm to streamline the financial aid application process.

Cardiff® TeleForm® and Liberty IMS's LibertyNet™ enable online access to forms and capture of data to SCT Banner database; lets USF concentrate on quality of service instead of paperwork

The University of South Florida (USF) is the second largest university in the southeast United States and among the top 20 in the nation. USF's affiliations with area hospitals, and its top ranking by the prestigious Carnegie Foundation for its excellence in research, make it the region's foremost research center in medicine, biotechnology and bioscience. Located in the Tampa Bay area, USF serves more than 39,000 students at four campuses.

The Challenge

The financial aid department at USF helps approximately 27,000 students per year apply for financial aid. The first step is filling out a Free Application for Federal Student Aid (FAFSA). The FAFSA is completed via paper form or online from the U.S. Department of Education website. After a USF student finalizes the FAFSA, information from it is downloaded to the university's system each night.

In the past, USF staff followed up each application with a letter requesting the documents they needed to complete the financial aid application process. Students would then mail or fax the additional information to USF.

In 1998, USF began an overhaul of this cumbersome and inefficient process, which required more than 20 full-time and part-time employees to accomplish. The first stage implemented a document imaging and workflow system called LibertyNET™ from Liberty Information Management Solutions (Liberty IMS), a provider of compre-



hensive information management solutions headquartered in Costa Mesa, Calif. Using LibertyNET, USF was able to scan and index paper documents, thus alleviating the need for paper storage.

"Once we had LibertyNET up and running, we commenced the second phase of the project to enable online completion of forms," said Lee Triebwasser, Director of Sales, Southwest, at Liberty IMS. "Because we are a longtime channel partner and of Cardiff, we knew just where to go for the second stage of the USF implementation."

The Solution

The USF Office of Financial Aid, with Liberty's input, implemented a seamless integration between the LibertyNET interface and Cardiff TeleForm. USF had been using TeleForm in prior years to process Stafford Loan application information, so they were familiar with the flexibility of the product. In addition, USF hired an outside consultant who, with LibertyIMS's input, created an integration program that updates BANNER from a Liberty file. BANNER is the university's Oracle-based student information system developed by SCT, a global e-education solutions provider.

"We chose Liberty IMS because the timing was right, they were back-and-forth compatible with Cardiff TeleForm, and a BANNER integration process had already proven successful at other BANNER schools," explained Lorelee Morrow, information systems coordinator, Office of Financial Aid at USF.

Customer at a Glance

University of South Florida, Office of Financial Aid

Industry: Education

Application: Financial Aid Processing

Challenge: Process nearly 250,000 documents per year faster; reduce paper processes

Solution: Cardiff TeleForm, LibertyNET image capture and workflow software

Partner: Liberty IMS

Results:

- Accelerated processing of 250,000 financial aid-related documents per year
- Reduced data entry of documents by more than 60%
- Saved \$25K-\$30K per year in elimination of paper
- Eliminated potential for lost files and missing data

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—Lorelee Morrow, USF

The Benefits of Cardiff

The Cardiff/Liberty IMS solution has greatly streamlined the collection of financial aid data from USF students. Students across all campuses can now access their outstanding requirements for financial aid via the Web using OASIS, the front end of USF's student information system. If there's an outstanding form that a student needs to complete, he or she simply clicks on a link to display the TeleForm-created form in PDF format. In the past, the financial aid department received paper forms with incomplete information, but the online process will not allow students to omit required information. The student can sign the form electronically using a PIN. Optionally, students can print forms from OASIS and mail or fax in a hard copy.

When the online form is completed or a paper form is scanned, it gets verified and indexed by TeleForm. It is then routed to LibertyNET via TeleForm. Every evening BANNER connects to a folder on the Liberty system, so that outstanding requirements get removed from the student's record.

In addition, USF uses the AutoMerge Publisher module of TeleForm to automate the first stage of the financial aid verification process (the Office Review Form). Before TeleForm, a staff member had to manually complete the Office Review Form, a form used to verify the information submitted on the student's application. Now AutoMerge Publisher pulls everything that the Office Review Form needs from information downloaded from BANNER to an Excel spreadsheet.

"We've been using TeleForm for seven years, and we're pushing it harder every day," Morrow commented. "Students don't want to deal with paper any more and neither does our staff."

In addition to making students' lives easier, Morrow also commented on how it has changed her office. "As soon as paper comes in, it's scanned," she explained. "We no longer have to generate paper letters to students if there's something missing in their files. Instead they get an email. If they don't have an active email address, we send them a paper letter, but more and more, students are opting for email communication."

The elimination of paper and the streamlining of processes have reaped some hefty savings. "We save \$25-30K per year by posting forms online and not having to pay postage for letters," Morrow said. "Plus we're seeing more than a

60 percent savings in labor, which has allowed us to re-allocate our team of 20. Now, instead of dealing with paper, they can devote themselves to providing administrative help and financial guidance to students who would otherwise not be able to afford to attend our university."

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