Cedarville University Provides Top-Notch Customer Service to its Students

Upland Software's workflow automation and document management solutions enhance the student experience for everything from offering online enrollment forms to identifying and helping at-risk students and streamlining internal communication to allow staff to spend more time working with and counseling students.

Market background

Many colleges and universities are struggling with budget cuts while still trying to plan much needed system and process updates to accommodate the daily needs of students, faculty and staff. Traditionally, the higher education industry has relied on paper-based forms to conduct everyday processes, but this antiquated system has become inconvenient and problematic due to quantity, turn-around time, and retention requirements.

Recognized as one of Ohio's best universities, Cedarville University is a private NCAA Division II school known for its rigorous academic programs, strong graduation and retention rates, as well as accredited professional and health science offerings, and leading student satisfaction ratings.

Challenge

Burdened with an unscalable, home-grown document management solution, Cedarville set out to find a scalable solution that provided online forms with robust automation capabilities, allowing their team to build streamline entire department lifecycles and eliminate the manual, cumbersome processes that involved printing and storing over 22,000 pages of paper every year. There were also retention policies to account for, too. Some paper records, like degree justification which have a permanent retention policy, were eventually filling every corner of some staff members' office space.

With needs ranging from document management and online form creation to behind the scenes workflow capabilities and integration with their student information system (SIS), Cedarville's IT and Admissions teams selected Upland's FileBound product because of its workflow capabilities, security, and scalability.

upland FileBound

At a Glance

Challenges
- Inefficient document storage processes
- Manual routing of students' applications
- Difficulty accessing student-related information

Benefits
- Instant access to student-related information
- Increased level of customer service to students
- Improved efficiency for Human Resources position requisition process

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– **Becky Dufresne**
   Associate Registrar for Records & Registration

The Upland FileBound Solution

Cedarville's IT team, led by Ryan Bowen and Michael McCoy, have created, built, and implemented solutions for student onboarding and maintenance (Admissions, Financial Aid, Registrar, and Student CARE), back-office solutions (Human Resources, Employee Advancement, and Payroll), and the School of Pharmacy. Altogether, Cedarville University has replaced over 20 different paper-based processes with online forms and automation – and with many more on the to do list.

"The real value is how FileBound allows students to fill out required forms at their convenience, whether lounging in their dorm room on their laptops at 2:00 a.m., standing in line for their coffee on their smartphones, or planning classes in their advisor's office. We no longer need to schedule meetings with students just to get a form signed," said Becky Dufresne, Associate Registrar for Records & Registration.

Not only was the Cedarville University IT team able to provide efficiency and process improvements in these key areas, they also provided a seamless solution by integrating FileBound directly with their SIS so that student data and documents automatically synced with Cedarville's SIS and vice versa.

"Using the FileBound API, we were able to populate a 'Student Snapshot' with information from both systems so that our Registrar's office could have all the information they need while staying in one system," said McCoy. "This type of integration has been key in improving efficiencies surrounding the rollout of FileBound."

"Various departments all use the same data – basic information like name, ID Number, and major to help identify them. By putting these securing these forms online with FileBound, we now know exactly who is filling out the form and can populate that information for them," said Ryan Bowen. "It might sound simple, but it's great because we don't need to ask the student again and again for information that we already have.

Cedarville University automates more than 20 business processes across their various departments, including:

- Student major & advisor change requests
- Class change requests including substitutions and transfers
- Organization of students' donor funded scholarships and university donor gifts
- Identifying and helping at-risk students via Student CARE project
- Storing and classifying financial aid documents
- Request for changes/additions to any internal position
- Storage, search and retrieval of tax documentation for employees

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