



COMPANION
DATA SERVICES®

A CELERIAN GROUP COMPANY

CENTRALIZE CANDIDATE RECORDS. AUTOMATE PROCESSES.

INDEPENDENT SCHOOL SOLUTIONS



FORMS • BPM
DOCUMENT • AUTOMATED CAP
M • DASHBOARDS • RECORDS MANAGEMENT • AU



Better manage enrollment, improve student/parent experiences, expedite operational processes, and connect staff with critical information.

What to Expect with ECM

Though every independent school is unique, they all share a common challenge: make the most of endowments, donations, and tuition dollars while keeping responsiveness to parents and students immediate and operational expenses down. You can achieve all of this by using DocFinity to automate, standardize, simplify, and expedite the flow of information and task completion across the institution. At the same time, you'll better control your student, staff, and donor documentation; prevent redundancy and errors; and leverage the information stored in your student information system (SIS) and other applications.

DocFinity intelligently captures documents, images, media, and other electronic files in their native/original digital format. It extracts data to send to your core applications or used for indexing and storage to ease future retrieval, automating retention efforts, and triggering workflows. You'll create more comprehensive, up to date, and complete candidate or donor folders, making them available for secure access from within your SIS. So, admissions packets, financial aid eligibility, email and phone correspondence, tuition statements, transcripts, and almost anything you might need or imagine can be accessed quickly and securely. And the benefits for your institution do not stop there. DocFinity also manages the documents and processes throughout the school including invoices contracts, donor forms, and more.

The benefits of DocFinity for your independent school include:

Cost-savings:

Instant, shared access to information; a decreased need for storage space; and automated processing and workflow will positively affect the bottom line in every department.

Scalability:

You can start using DocFinity in one department, then extend it to other departments as you're ready. In addition, the turn-key system allows you to activate unused modules immediately upon purchasing a license.

Connecting Silos and Systems:

Because DocFinity integrates with your student information, accounting, HR, and other applications you'll optimize your existing investments, even as you achieve greater efficiencies throughout the school.





Simplifying Admissions

Admissions offices face constant challenges in processing candidate applications and returning decision letters in a timely manner. Incoming materials and supporting documentation are received in various formats, creating inefficiencies that impede turnaround and discourage student interest.

Whether you're accepting applications for early decision, early action, on a rolling basis, or on a fixed deadline, DocFinity enables you to customize the process in a way that makes the most sense to your decision processes. You'll automate the assimilation of comprehensive candidate records—even if materials are submitted at different times, in different media—by utilizing checklists to collect information; workflows for proper review by educational consultants, coaches, and activity directors; and automation to email candidates when information is missing. Candidate information is secure, centralized, and available instantly. BPM/Workflow lets staff members push routine tasks to the appropriate people for timely action. Records are no longer lost or misplaced; and student and parent inquiries are answered immediately.

With these capabilities DocFinity allows you to:

- Intelligently image documents to automate the indexing process for proper storage, access, and flow of complete candidate folders, which may include transcripts, letters of recommendation, applicant questionnaires, accolades, correspondence, and other files.
- Automatically identify candidates matching desirable criteria and accelerate them to the front of the evaluation line.
- Create checklists so that evaluations are initiated only when fulfilled; and inquiries are automatically sent to candidates when information is missing.
- Image enable student information systems to retrieve complete candidate packets electronically from within your familiar application.
- Enable the automation of real-time updates for candidates.
- Simultaneously access documents for review.



Help for the Registrar

The registrar's ability to create schedules, audit degrees, and manage retention of transcripts is vital to the efficient conduct of the school's business, as well as to its students. That's why DocFinity enables registrars to:

- Automate transcript indexing, retention, and data extraction with intelligent capture.
- Standardize processes including grade changes, adds/drops, graduation applications, and more.
- Create a secure, central repository of student records integrated with the student information system.
- Apply retention rules to all records.
- Offer students, counselors, and parents self-service capabilities that enhance information sharing and collaboration; reduce administrative costs; and reduce data entry such as student-information changes, processing transcripts, grade changes, withdrawals, and other attendant processes.

DocFinity's workflow capabilities also integrate with electronic forms and other applications to automate standard processes—creating a complete, streamlined, process management system. Activities that involve multiple parties or require approvals, signatures, or other actions can be completed in a fraction of the time required with multiple software applications or paper.

Because your ability to attract and retain academically qualified applicants depends on quick turnaround—and immediate, secure access to and management of financial aid documents—DocFinity keeps you connected to applications and supporting files, making them accessible from within your SIS and other core systems. Workflow allows you to process applications on receipt of a complete package, streamlining the processing of approvals, denials, and signatures.

DocFinity enables you to:

- Intelligently capture documents, pulling needed data to launch routine tasks such as initiating standardized letters or calls for additional information.
- Expedite award decisions by decreasing backlogs—even during peak periods.
- Give status updates to applicants and other stakeholders at any time during the verification process.
- Prevent delays, reduce wait times, enhance services, and decrease the cost per application.



Student Life

- **Athletics** can integrate with recruitment management and other systems to help manage eligibility requirements of student-athletes: managing status requirements for competing; verifying parental approvals and managing signed waivers for participation and traveling; sharing information with enrollment and other departments, parents, and agencies; and streamlining approval processes with electronic signatures.
- **Residential Life** departments can make housing management information accessible to authorized personnel from within your SIS. Workflow can initiate notification letters automatically, improving housing allocations and expediting student services. You can also automate notifications to parents when funds in student accounts are low, or manage permission slips and waivers for extracurricular activities.
- **Health Services** departments can manage and securely view complete student health records by including correspondence, billing info, email messages, and other information pertaining to medical history. DocFinity integrates with EMRs/EHRs, and can allow guardians self-service to lab and evaluation results. It can also enable them to upload medical information critical to their child's care while at boarding school. It also improves accuracy and automates administrative processes.



Alumni & Donor Relations



Given the importance of alumni and donations to the financial health of your institution, as well as to its public relations efforts, your Fundraising and Alumni Relations offices have to process and manage their information effectively. DocFinity affords easy access to donor and endowment records. It also integrates with the relations management tools you might already be using, as well as with donor, SIS, and event management systems.

Donor pledge cards and checks can be scanned and automatically stored electronically, and workflows can be triggered to send thank you notes and tax forms to contributors.

Workflow also triggers any other standard procedures, enabling you to respond to inquiries about the status of donations and check deposits immediately at any time during the process.

In addition, DocFinity effectively monitors donor files, letting you know when to reach out to donors and update personal information. You can also upload information to associate with a specific donor or alumnus that might be advantageous to know when building on relationships and requesting future donations.

**Upload and search
for documents, and
complete
processes
on the go!**



Physical Plant

From work orders to approvals, from blueprints to purchase orders, the documents issued in the maintenance of your school's physical assets can run into unmanageable numbers, with equally unmanageable volumes of paper. That needn't be so.

By converting documents to electronic files, DocFinity's workflow can distribute tasks to employees automatically, storing them — along with corresponding reports and follow-up documentation — and making them accessible to authorized personnel.

In addition, with mobile capabilities, you'll have access to needed information from the job site. This technology also enables maintenance crews to set up job queues that allow for changes in prioritization. Automated notifications can keep departments updated when function rooms are ready, tasks are complete, or projects have progressed.



Operational Order



Human Resources — Managing the paperwork associated with every faculty and staff member—as well as coaches and volunteers—can be a challenge. Complementing your HR system, DocFinity stores and manages the retention of the documents associated with each person, including credentials, clearances, degrees, insurance and benefit information, tax forms, and more. DocFinity can even automate notification to employees and HR staff when clearances are about to expire or credentials need to be updated.

Accounting — For many institutions, DocFinity assists accounts payable with quick and efficient turnaround related to payments. Utilizing workflow, you can route incoming invoices to the purchaser for review and approval upon receipt, and anyone else that may need to verify and approve the payment. Any discrepancies can be immediately addressed. These quick turnarounds have enabled schools to take advantage of early payment incentives. DocFinity then stores and disposes of the document according to their retention policies.

Records and Archives — Beyond the student driven aspects of the university, you're challenged with managing a lot of documents (e.g. the school's historical information, public relations announcements and speeches, contracts, grants, institutional accolades, board meeting minutes, news coverage, faculty recognition, etc). Often these are stored in filing cabinets or share drives, or boxed and stored in warehouses. Gaining access to these documents can be time consuming and storage can be expensive.

Converting to a document management system frees up space, as well as budgetary money to be allocated for better use. In addition, it allows secure self-service to information that staff, board members, parents, and students are authorized to view. Lastly, when grants and contracts need to be renewed, the appropriate parties can be notified.



School-wide Initiatives

Integration with SIS and Other Systems:

Your student information system (SIS) is indispensable to your institution's ability to manage student data. From enrollment to financial aid to alumni services, your SIS system ensures that student records are accurate, up to date, and easily accessible. DocFinity allows you to collect a check-list of documents from an applicant and make them available within your SIS interface, deliver data from these to other systems, and automate notification processes to students, parents, faculty, and staff.

Ask us how DocFinity integrates with and complements your institution's Student Information System, including:

- **Blackbaud**
- **Veracross**
- **eSchoolPLUS**
- **Rediker**
- **Homegrown Systems**

DocFinity also enhances all of your other core applications. Integrate DocFinity imaging and workflow functionality with your core accounting system for quicker approval of faculty and staff requests and payments to vendors. Manage the retention and renewal processes around staff benefits and faculty credentials. The possibilities are endless.

Compliance:

Regardless of the department, DocFinity can help you comply with regulations with electronic document and lifecycle management, workflow, and auditable transparency. You can define and enforce privacy and accountability measures. You can see who has accessed which files, the times of access, and the actions taken. You can also give management and regulatory bodies secure access to information to demonstrate your compliance.

Records Management:

DocFinity's seamless approach to records management automatically applies retention and disposal rules based on the declared document type, taking the responsibility off the shoulders of your staff. Records management prevents unauthorized access, manipulation, and inadvertent destruction of files; helps mitigate or prevent litigation; helps comply with institutional and government policies; and ensures consistency.

Image Management:

With thousands of documents — student records, transcript requests, applications, administrative reports, internal paperwork, and more — image management has to encompass more than scanning documents to your server. Utilizing Intelligent Capture, you can automate indexing, update fields in other applications, and trigger workflows without manual intervention. And since DocFinity integrates with your SIS and other applications, you can securely access and view documentation associated with student records or purchases with the click of a button.

Gathering Info with eForms:

Creating, storing, distributing, and managing forms electronically helps streamline admissions, registrar, HR, operations, and other processes — improving turnaround times, communications, efficiency, and accuracy. By placing forms on your portal, you'll gather information on candidates and process applications more efficiently, reducing processing errors and diminishing manual keying. You'll enable students, faculty, and staff to retrieve needed information. And workflow processes can be launched based on gathered data. In addition, eForms can be utilized to pull and display information from other systems so that staff can decrease time spent searching for imperative data.



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**ECM, AUTOMATION, CAPTURE
& RETENTION SOLUTIONS**

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