

- **University of Texas, San Antonio**

The **University of Texas, San Antonio** (UTSA) was established in 1969. It is the second largest university in the University of Texas system, and is in the top 25 nationally. **Image-X document management system and Salesforce** gives the **University of Texas** the ability to secure more student loans and grants in less time. Using customized and automated workflows Salesforce is helping the University of Texas prioritize their activities and be more productive.

While the cost of education continues to increase, universities are looking for cost-effective ways to streamline their flow of information. To be successful, universities need meaningful information systems that can be accessed efficiently throughout the entire university. This is just one example of how Salesforce technology is meeting, and exceeding, the demanding needs of financial departments.

The Problem: To help students pay for tuition, the university takes an extremely active role in securing Federally backed loans and grants. Due to its size, UTSA took an extended amount of time to process the financial aid applications submitted by students. UTSA realized that it needed to find a more efficient method for processing the thousands of forms it receives from students each semester. Enter Image-X—with their knowledgeable Salesforce consultants, after evaluating the university's needs they immediately recognized the solution. Vital to the project's success would be the ability to create custom workflows through Salesforce, while implementing elegantly applied custom code to tie all of the parts together seamlessly.

The Solution: Image-X proposed their state-of-the-art **document imaging system**, for scanning, routing and retrieval of the students' financial aid applications. This system would be integrated with **Salesforce** and their existing financial aid management application (DTS), which provides comprehensive student financial information. Through Salesforce, custom workflows would be created to automate most of the data entry and intake processes.

The student delivers their completed application to the financial aid office. The forms are scanned in batches and indexed into the existing DTS system with a single keystroke. Each evening the DTS system sends pertinent information from the students' financial aid application to the Department of Education's mainframe system in Iowa. The mainframe checks the loan history of each student and evaluates the application for completeness. It then returns a status code based on its findings to UTSA. Each financial aid application is automatically advanced to the appropriate financial aid counselor based on the status code.

Documents no longer need to be hand carried from one desk to another, applications are no longer misplaced, manual data entry is eliminated and students' applications can be looked-up with a single keystroke. Students automatically receive email updates of their application's status. When there is a problem with an application, students are sent automatic alerts, and the financial aid department can monitor which students have not acted on these alerts, allowing them to quickly prioritize and take action.

Cost Justification: Image-X gave UTSA the ability to award financial aid to eligible students faster than ever before. Students could take more classes each semester, resulting in increased revenue for UTSA each fiscal year. Integrating a **document imaging solution and Salesforce workflows** with their existing system also reduced the overall cost of processing a financial aid application. Converting paper-based workflows into electronic workflows, saved money on paper/printing costs and streamlined the process allowing staff and counselors to be more productive.