

Verifications 600% Faster at Tarleton State with Implementation of StudentForms

At Tarleton State University, students aren't just numbers. They're family members, explains Kathy Wright, Executive Director of Student Financial Assistance Services. That's why having time to build relationships with students is so important to Wright and her staff. But that student-first philosophy was threatened when inefficiencies began to plague the financial aid office. "We were so immersed in process that we couldn't come up for air," Wright explains, adding that their outsourced verification process was taking 10 to 12 business days. "That just wasn't the customer service level we felt our students deserved. We lost control, and I felt it wasn't best for our students."

When she had to resort to passing out treats to students who were waiting outside the financial aid office, she realized something had to change. "We had lines of students sitting on the floor in the hallway. I knew when I had to walk out with a basket of candy to give to them while they waited, this wasn't what we needed to be doing. We had to find something else."

That new solution needed to streamline processes and free up staff time to focus on students—but Wright didn't want to build it from scratch. Instead, Tarleton, a multi-campus institution and a founding member of the Texas A&M University System, chose to partner with CampusLogic. Tarleton, which uses Banner by Ellucian®, was able to seamlessly implement CampusLogic products and immediately see process improvements. "It has given us a platform to operate digitally," explains Caruso. "We can do business as usual with very little disruption."

The Solutions: StudentForms™ by CampusLogic

[StudentForms](#) simplifies financial aid processes—like verification, professional judgments, and SAP appeals. A key component of the cloud-based CampusLogic student financial success platform, StudentForms provides a digital portal for financial aid professionals to manage tasks, review files, and automate student communications via text and email. Plus, students can upload documents from



any mobile device—a feature staff and students love for the time savings.

Cutting Verification Times and Gaining Control

Wright recognizes the importance of streamlining and saving time, especially when it comes to providing top-notch customer service to today's students. She knows they are accustomed to personalized, digital interactions in nearly every aspect of their lives—making it an even greater victory to shorten verification times so drastically with StudentForms. No longer a process that takes 12 business days, verifications are now completed in under 48 hours, even during peak times. And Wright says that some even have a same-day turnaround. "We've never been able to do verifications on the same day before!"

It's also brought control back to the financial aid office. "Now we can decide what's a priority. With our previous partner, if we asked for something to be expedited, it would still take two to three days.

Now, when we want to expedite a verification, it usually means right now,” says Wright.

Best of all, implementation was painless for both students and staff, and StudentForms is a hit. “It’s intuitive. It’s user-friendly. It’s very easy to navigate,” Wright reports.

More Than They Bargained for with StudentForms

Tarleton adopted StudentForms for verification, but they got much more than they bargained for. They’ve found ways to use it to improve other processes, too. “Every time we think of doing something new, we think about how we can do it with CampusLogic,” Wright says. “We’re utilizing StudentForms in ways we hadn’t anticipated when we signed on, but it’s been fantastic.” So far, they have revamped SAP appeals, award letters (using CampusCommunicator®, a personalized digital communication platform from CampusLogic), and made their in-state Texas grant process paperless and painless for staff.

Having great support and the ability to collaborate on innovative solutions was integral in Tarleton choosing StudentForms. Previous partners had not offered the level of support and collaboration they required, and says Wright, “It was more like Tarleton was a square peg trying to fit into a round hole.” She goes on to confirm, “It’s not that way with CampusLogic.” Tarleton is currently in the process of implementing ScholarshipUniverse® from CampusLogic, which automatically matches both institutional and external pre-vetted scholarships with students based on each student’s unique profile and characteristics, dramatically reducing scholarship search fatigue while affording students more options to fund their education without committing to additional debt.

Back to Their Main Focus: Students

All of these new and innovative efficiencies mean the financial aid staff has a lot more time to focus on what really matters: students. “I think building a relationship with the student helps us be successful in what we’re doing,” Wright says. “If we don’t have to constantly focus on processes, if that’s in the background working, then we have the opportunity to focus on students. Tarleton is different than other schools. We truly feel like it is a family, and financial aid plays a big part. CampusLogic has given us back the time to refocus on that.”



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