



The Impact of a DMS on Higher Education

August 2, 2022



While universities are on summer break, it is important to think about how processes can be optimized for the next academic year. Higher education has a high volume of documents coming and going from desks and admissions offices. Applicants vying for admission have to submit applications, exam scores, essays, letters of recommendation, and more.

With each applicant creating a high volume of paper, there must be a system and process to keep track of the flowing paperwork. Streamlining all forms of paper trails for university departments is crucial for success.

With multiple streams of digital and paper documents flowing in and out of the university, a Document Management System (DMS) is a great way to optimize the process of organizing application documents and other important administrative documents. A DMS can help speed up the process of sending out acceptance letters and offers to potential incoming students.

[Getting started with a document management solution](#) can seem daunting at first with the upfront preparation. But, the lifelong value comes almost instantaneously after implementation. Both your employees and your future students will see a huge increase in efficiency.

This blog will discuss multiple pain points that universities face and how a DMS can resolve them and alleviate their burdens.

Admission Use Cases for a DMS

A document management system can help speed up and smooth out your admissions process through workflows. While every university requires different information for application and admission processes, a DMS can be customized to meet those specific requirements.

Whether it is admissions officers sending approved applications to the admissions committee, or moving applicant information from one to another staff member, it is vital that the correct documents and information are speedily in the correct hands.

A good DMS has automation capabilities. This allows you to build out your custom processes to automatically distribute tasks and information across departments and teams based on triggers and actions. Your university's application review process might consist of an application needing to go through multiple departments, committees, or teams before an acceptance letter can be sent to the prospective student. A document management system can automatically move applications through automations instead of a staff member having to manually email or walk the document to the next step.

Manually emailing or handing off printed applications can create human error and cost the university. Workflows eliminate those unnecessary steps. With rules-based routing, you can define and enforce business rules such as reviews and approvals. This is vital for smooth transition of applications and information to ease the roles and responsibilities of an admissions office so they can focus on serving the students and providing a high quality experience for all.

Through a DMS, you can set up notifications based on certain criteria to alert specific people if a document has been approved or reviewed. You can also define how long it takes to go through processing a single application within the workflow. Upon the estimated completion time arriving, you can have notifications set up for when a document is ready to be reviewed or is reviewed. This reduces the paper trail and amount of emails sent and received. This also prevents projects from falling through the cracks. Rules can be set where a document must be reviewed before moving forward in the process. This can be extremely helpful with moving projects through the approval process.

Administrative Use Cases for a DMS

Administrators need to organize various documents for each student at their university. With a DMS, administrators can organize transcripts, applications, financial aid documents, student information, and more. Now more than ever, it's time for your university to [go paperless](#) with the world of hybrid educational programs.

A DMS can securely store crucial documents along with allowing staff to index them for easy access and quick retrieval. Additionally, you can use metadata to tag values such as a Student ID Number or other identifying information to make document retrieval easier. Metadata is composed of notes and information about the file to help with tagging and organization.

A document management system can auto-generate the organization and categorization of documents to speed up the process. Organize faculty documents such as course syllabi, exams, coursework, and more to ease professors' loads for departmental organization and utilization. You can classify information through indexing. Indexing describes a digitized document and allows you to quickly search and retrieve the needed information.

For campus student health centers, they too need a way to process, organize, and store incoming students' immunization records along with other crucial health information. A DMS could help accelerate that process and ease the stress of managing critical data. With specific security measures, a DMS protects confidential information for students and staff.

Confidentiality is Key

Admissions Offices handle plenty of documents with extremely confidential information such as students names, emails, addresses, Social Security numbers, etc. Keeping this information in a filing cabinet can jeopardize the security of this information. Many issues can arise if your staff members are still [keeping your paper based documents](#) and that is a risk you do not want to run. A document management solution can ensure that you are compliant with FERPA and HIPAA standards, along with other regulatory requirements while also having the ability to keep all documents secure.

You can also set up security for specific documents that you may only want some people to see. For example, a confidential document such as one with a student's Social Security number and personal information can be secured where only authorized people or positions can access it. This prevents everyone in the department from being able to access that information, keeping it as secure as possible.

Current and incoming university students are trusting your university with valuable and confidential information. As an institution, you want them to have peace of mind and a positive view of the university. Ensuring the security of their personal information is crucial for building trust and peace of mind among students.

Universities must be able to diligently handle conflicts, incident reports, Title IX reports, and other confidential information pertaining to residential life of students and university security. With user-based permission settings, Optix ensures that the right information will be seen by the right people. Student RA's and Residential Life Staff can have different security levels to prevent students from having the same security clearance and document access as full-time hired staff. While Student RA's need access to file an incident report or fill out forms, they do not need access to the complete database like full-time

Residential Life Staff. With indexing and organizational features, keep various types of documents organized for future reference and usage.

For more information, read our blog on how [universities can get started with a DMS](#).

Get Started Today

You understand why a document management solution will benefit your university operations, but how do you start implementing one? Start looking for document management systems that align with your business process needs. [Finding the right document management system](#) is crucial, many different systems have different features and options you will have to consider. [Contact us](#) today to discuss the right DMS option for you and your university if you need any help figuring out how to pick the best solution for your institution.