

Xerox® Workflow Automation Solution for Financial Aid

By utilizing Xerox® Workflow Automation Solution for Financial Aid, you can send out financial aid packages sooner than with paper-based processes, resulting in higher achievement of enrollment goals.

With Xerox® Workflow Automation Solution for Financial Aid, automated tools help colleges and universities efficiently process high volumes of applications—even during peak periods.

Keep up with the demand of processing large applicant pools.

With a record number of applicants, financial aid processes are getting overwhelmed. On top of that, with more students applying for assistance, it's more important than ever to distribute award money based on having the right information. Xerox® Workflow Automation Solution for Financial Aid helps eliminate overburdened processes to ease verification and get aid packages out faster. You no longer risk losing best-fit applicants because your staff can't keep up with processing information.

Automatically capture key data from verification documents.

Through students uploading files securely online or through processors that scan in paper documents, the system indexes

each document with key verification data. As verification documents come in, the checklist in your student information system (SIS) or financial aid system is automatically updated—making it easier to answer student/parent questions about what documents have been received or are still due. If your SIS includes portal functionality, checklists of received and still-outstanding documents can be viewed directly in the online portal so students can see their status at any time. By providing students with an easy, self-serve option, you help reduce the number of status calls that come into your financial aid office.

Once all verification documents are received, the system automatically routes each student's record for review. In a side-by-side comparison, the Institutional Student Information Record (ISIR) data from the SIS shows alongside the corresponding captured data from the verification documents. Then, the system alerts users when individual fields do not have equal data. This allows advisors to assess the situation, make necessary changes in the SIS and leverage SIS functionality to report changes for your records.

Financial aid offices are facing a rising number of applicants and greater pressure to secure best-fit students, but with less staff and reduced budgets.



Manage high volumes of financial aid applications.

Accelerate access to files.

With a Xerox® Workflow Automation Solution for Financial Aid, it's easy to make changes to files. When auditors come around, you can produce student records and reports quickly and easily. This also gives your staff more time to dedicate to customer service and other student-facing initiatives.

Work with a knowledgeable team.

We're knowledgeable in digital documents and workflows, but we recognize that your information and processes are unique to your business. Through qualitative and quantitative assessments, we capture a true analysis of your current state. From there, we can deliver an integrated solution for you. Our Workflow Automation Solution for Financial Aid is just one building block within our overall Higher Education offerings, so we can help you along your digital journey. From initial design, to deployment and rollout, to training and support, Xerox stays with you at every step of the way.

“Xerox® Workflow Automation Solution for Financial Aid allows us to image our student and parent verification forms. Retrieval is much easier and we've eliminated the time spent filing documents in folders.”

—Executive Director,
Student Financial Aid Office,
Major University in the Central U.S.

Financial Aid Application Processing Workflow



Capture students' required verification documents (scanned images or electronic feeds)



Update document checklist in SIS or financial aid system



Route complete files to counselors for verification



Resolve exceptions (address C-flags or internal comments and request missing documents)



Complete review



Leverage ERP or Xerox® Workflow for Higher Education to notify students



Issue award letters weeks earlier



Learn more at xerox.com/was.