

IDOC

Institutional Documentation Service

Fact:

By transitioning your office to a paperless operation, eliminating tedious data entry, and automating document tracking and verification, you can take your office to the next level of efficiency and service. IDOC saves you space and helps streamline office processes to give you the control you need to deliver financial aid offers as early as possible.

Challenge:

Tax documents make up the bulk of paperwork received and processed by aid offices each year. Managing this paper puts heavy demands on staff time and other resources.

Solution:

Institutional Documentation Service (IDOC)

IDOC is a unique, customized service that collects documents from aid applicants on your behalf, scans them, key-enters tax data and **displays imaged documents for you on the Web**. More than just an imaging service, **IDOC transmits electronic data from tax forms directly to the aid office** for fast and effective verification. IDOC can help improve customer service by enabling your staff to spend more time with students and less time with paper.

How IDOC works:

You send an electronic file to the College Board containing the names and addresses of students you want us to notify.*

You tell us which forms you want applicants to submit, and the date you need them. We contact students on your behalf, and they send documents directly to the IDOC processor.

You view document images on the Web and download the keyed tax form data to your campus system using the electronic file that we provide.**

At your request, we will provide imaged documents to you electronically, allowing you to integrate them into your on-campus financial aid or document management system. This option is available at no extra cost.

* **CSS/Financial Aid PROFILE®** users have additional automated selection options.

** **PowerFAIDS®** users will find this process even easier because PowerFAIDS and IDOC are fully integrated, further automating document tracking and verification.



College Board Financial Aid System

IDOC seamlessly integrates with CSS/Financial Aid PROFILE® and PowerFAIDS®. When a student submits a PROFILE application, a request to submit an IDOC report is automatically generated. You can choose to request IDOC packets by submission files instead. IDOC data can be uploaded directly into PowerFAIDS or campuswide systems for quick verification and communication with students.



IDOC benefits

Saves time and improves service

- **Provides three- to four-day turnaround**, which gives your financial aid staff quick and easy **24/7** access to document images via a secure website
- **Eliminates backlogs of unopened mail or unprocessed documents** in your office
- **Delivers documents right to your fingertips**, which means less searching for documents or filing tax forms
- **Supports inclusion of institution-specific forms in a single imaged record**, enabling automation of your entire application review process
- **Allows applicants to meet requirements of multiple schools by submitting one set of documents** to one address, thus simplifying the aid process for families

Saves money

- **Reduces handling, mailing, storage** and other operational expenses

Improves accuracy of verification and awarding

- **Provides key-entered tax data from a reliable source**, with an accuracy rate exceeding 99.8 percent
- **Supports automated correction** of verification data

Customized features give you control.

- **You customize IDOC to meet the needs of your processing cycle** by selecting which forms students should submit and by setting deadlines for submission.
- **You choose the students to participate in IDOC** (e.g., all applicants, selected applicants, first-time applicants, renewal applicants).
- **You decide whether to view imaged documents on our website*** or locally.**
- **You receive an encrypted electronic file** containing all the images of your applicants' documents at the end of the processing cycle.
- **You control the process** from start to finish.

***The complete PROFILE report is available online beginning 2011-12. Access to both IDOC and PROFILE images gives you the most efficient file review possible with little or no reliance on paper.

For more information, call 800-927-4302 or e-mail enrollmentsolutions@collegeboard.org.

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