

IDOC

Institutional Documentation Service



Processing financial aid with more efficiency, accuracy, and care.

By transitioning to a paperless operation, eliminating tedious data entry, and automating document tracking, you can take your office to the next level of efficiency and service. IDOC saves you time and resources with easy electronic document imaging and more accurate aid processing.

Each year many aid offices receive financial aid application documentation in paper form. Managing this paper puts heavy demands on staff time and other resources.

IDOC 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 use. 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 upload documents through an online web interface.

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'll 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.

Seamless Integration

IDOC seamlessly integrates with CSS/Financial Aid PROFILE® and PowerFAIDS®. When a student submits a PROFILE application, a request to submit required documentation through IDOC is automatically generated. You may also choose to request IDOC information from targeted populations by submitting an optional customized list of students generated by PowerFAIDS. IDOC data may also be loaded directly to PowerFAIDS and leveraged in student communications.

Saves time and improves service

- ▶ **Provides a quick turnaround** from student document upload to online data delivery, 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 electronically, so you don't have to search for paper 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, simplifying the aid process for families
- ▶ **Features an easy upload process**, allowing students to use a smart device or computer to securely submit documentation electronically, eliminating mailing time in most cases
- ▶ **Supports multiple file types including** pdfs, tifs, or jpgs. Students may also submit documentation by mail
- ▶ **Allows students to review the status of their submissions online, get customized information, and manage school requests** through an online document management dashboard
- ▶ **Offers online tutorials** and help to families 24/7

Saves money

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

Improves accuracy and supports automation

- ▶ **Key-entered data** from a reliable source has an accuracy rate exceeding 99.8 percent
- ▶ **Data files** can be used to update financial aid systems and processes

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, or by custom list)
- ▶ **You decide** whether to view imaged documents on our website or locally
- ▶ **You receive** an 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

Learn more at collegeboard.org/idoc



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