



Ivy League University deploys electronic Financial Aid forms integrated with their Perceptive ImageNow document management system

- The Financial Aid office was collecting lots of detailed information from candidate families and manually scanning/inputting it into their document management system.
- With frevvo Live Forms, they can easily create intelligent forms that are easy for families to use.
- The forms ensure that sensitive information is collected securely.
- Integration with their Perceptive EDM ensures that the end-to-end process is electronic and no manual intervention is necessary.

Customer Profile: This world-renowned Ivy League University has long been recognized for the quality of its academic and research programs and its dedication to developing global leaders.

Business Situation: The University's Financial Aid office needs to securely collect a large variety of data from a candidate's. The paper-based process they were using was tedious for families as well as staff who had to input/scan the data into internal systems.

Solution Summary: Using Live Forms, the Financial Aid Office implemented and deployed several electronic forms and integrated them with their Perceptive ImageNow EDM system. Now, the forms running in frevvo's Cloud submit data that flows seamlessly into Perceptive. Throughout the process, frevvo's world-class Customer Success team was able to support them to ensure success.

Benefits:

- With Live Forms, it's easy to create intelligent, dynamic forms.
- Sensitive data is collected securely without email – a huge benefit.
- Documents are automatically indexed into Perceptive and security policies are enforced.
- Automatic validations, calculations and business rules reduce errors and corrections.
- E-forms remove the need for manual data entry and dramatically improve efficiency.

The Financial Aid Office anticipates digitizing several additional forms & workflows.

“Our future success lies in our ability to deliver exceptional services to students and families.

We are truly happy with frevvo Live Forms. Our primary considerations were adoptability, simplicity and integration.

frevvo's modern, online system is easy-to-use, and meets our needs at a reasonable cost.

Live Forms is the best web-based forms & workflow solution on the market today for our needs.”

**Director of
Information Technology**