



# HIGHER EDUCATION SOLUTION

| Document Imaging & Management

## Walsh College iDoc™ Document Imaging in a Higher Education Environment

A Proven Application  
in a New Setting

### AN ACADEMIC FIRST

Walsh College of Troy, Michigan, is an independent, non-profit institution offering a broad range of business and related technology degree programs at the bachelor's, master's, and doctoral levels.

A high percentage of instructors are also working professionals in the business world. Spread over three campuses, it is the state's largest graduate business school, with the largest group of MBA candidates of any in Michigan.

The college, like so many organizations moving forward into the 21st Century, needed a more efficient way to handle the ever-increasing load of paperwork and the documents that enter with students and follow them through their academic careers. With an extensive paper-based records system, storage and access are prime problems. Plus, Walsh needed "workflow," to be able to collect, sort and route documents to the appropriate people and departments.

### A PERFECT FIT

The situation was a perfect fit for CareTech Solutions' iDoc™ Document Imaging System, which was originally developed for (and is now in use by) hospital systems throughout the country.

The complex records-keeping needs of the healthcare industry have many similarities with higher education – among them, strict security and high-volume storage, with easy, multiple access by authorized users in widely separated locations.

Accordingly, Walsh College is iDoc's first academic use in the country – and will by no means be the last.

### INTRODUCTION AND IMPLEMENTATION

For the first few months of implementation, documents were all handled on paper first, as they had always been – then sorted and scanned, and routed through iDoc workflow for task assignment and online action.

On October 20th of 2008, new documents began to be scanned and entered directly into iDoc, eliminating the initial paper flow from the first two departments to begin using the system, Admissions/Advising and Records/Registration. Plans are ongoing to expand the system into other departments as well, such as the business office, HR, and payroll.

Work progresses on scanning the legacy files from previous years concurrently with new entries, until all files are eventually in the iDoc system. Meanwhile, the positive buzz continues as more and more efficiencies are realized.



## System Features

### ADMISSIONS

Handle all incoming documents such as recommendations, transcripts, exam results, letters

### STUDENT RECORDS

Securely store and access grades, registration info, transcript requests, etc.

### WORK QUEUES

Build queues based on users, groups of users, function

### TASK ASSIGNMENT, DOCUMENT ROUTING

To one or more users at time of scanning or thru work queues

### NOTIFICATION OF TASKS

User configurable based on preferences, thru iDoc, e-mail or both

### MANAGEMENT REPORTS

Tracks all functions by all users, based on activity, function, time-frames, etc.

### AUDIT TRAILS

A complete record of who has accessed files.



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## TRAINING AND ASSISTANCE

As always with a new experience, there was some initial reluctance to giving up a familiar system, no matter how cumbersome it had become. But training went smoothly, once the system was explained in terms of the “paper world” of how the staff was accustomed to sorting and routing actual documents. Such tasks and completions have clear-cut parallels in iDoc – except they can be done much quicker and more efficiently.

During and after training, an unexpected reaction set in. People were becoming uneasy, not because the learning curve was so difficult – but because it was so easy! Again and again, they voiced the concern that they felt they might not be getting enough training. Were they missing something? It’s not any harder than that? And they had to be reassured: No, it really isn’t any harder than that.

In addition to training, everyone soon found that the iDoc application itself contained a lot of self-explanation, with prompts and headers that made it unnecessary to stop work and look up answers to a question or call for help.



## Success Story

### Voices from the real world

“CareTech went through all of Walsh’s processes for the implementation, documented them, and gave Walsh a chance to see them in a fresh light. We even modified some processes to fit the product; iDoc doesn’t force you to use all its capabilities at once – you can use the features that you need, when you need them, and keep expanding as it makes sense.”

“What we appreciated was the time the CareTech team put in, with weekly meetings, which really helped us learn more about the product’s capabilities. Service has been a big factor with us. CareTech was very receptive to our ideas and understood all our concerns. They’ve made a continuous effort.”

**JEREMY GUC**

Director, Admissions & Academic Advising,  
Walsh College

As an electronic filing system it’s great! It’s so much easier to just go to the system and find a file. We’re gradually working on trying to take advantage of the features like workflow, in areas such as the withdrawal process, or problem registrations where many e-mails used to go back and forth.”

“The most telling thing that shows how people have accepted it, is that they’re always exploring new ways to use it, looking at new opportunities. It is definitely a timesaver. Anybody who’s thinking about such a system should investigate iDoc. You just have to give it a chance and have an open mind.”

**KAREN HILLEBRAND**

Director, Records & Registration, Walsh College

**CareTech Solutions, Inc.**, an information technology services provider for hospitals and health systems, is committed to creating value for clients through customized, flexible solutions that contribute to improving patient care while lowering healthcare costs. From implementing emerging technologies to supporting day-to-day operations, CareTech offers clients expert services to satisfy the most demanding IT requirements.