The Classical Academy of Sarasota
Workflow Automation and Document Management Case Study

LiveForms and Docubase for workflow automation and student records management.

BACKGROUND

The Classical Academy of Sarasota, is a prestigious private K-12 school located in Sarasota Florida. The school's accredited curriculum, small class sizes, excellent reputation, and affordable tuition make it a popular choice in the fast growing Southwest Florida area.

Due to its rapid growth, the school's admissions process was being strained by the large influx of new applications, which were done on paper and processed manually. They were in search of a much better experience for prospective students and a more efficient administration of student records, and the expertise and technology provided by dbs proved to be the key.

The main requirements for the solution desired by TCA were:

- An electronic student application form to replace the paper form in use.
- Ability to digitally capture student information, collect attachments, collect payment, and collect signatures.
- Automate the admissions process, including application review and approvals by multiple faculty members.
- Allow applicants to save and return to complete the application at a later date.
- Having a digital student records filing system.
- Hosted service with high reliability and fast performance.
- Easy to use by non-technical faculty and staff.
- Affordable pricing.

WHAT WERE THE CHALLENGES?

- The entire admissions process from application, to review, and approval was being handled manually on paper.

- The number of applications was overwhelming staff.

- Capturing payments using their school approved Authorize.net payment gateway was difficult.

- Paper based Student files were kept in physical filing cabinets.

WHAT BENEFITS WERE ACHIEVED?

- Made the admissions process 100% digital.

- Automated workflow frees up administrators to focus on more valuable tasks.

- Streamlined and friendly user experience during application process.

- The school now enjoys a complete grade document management solution at a very reasonable budget.
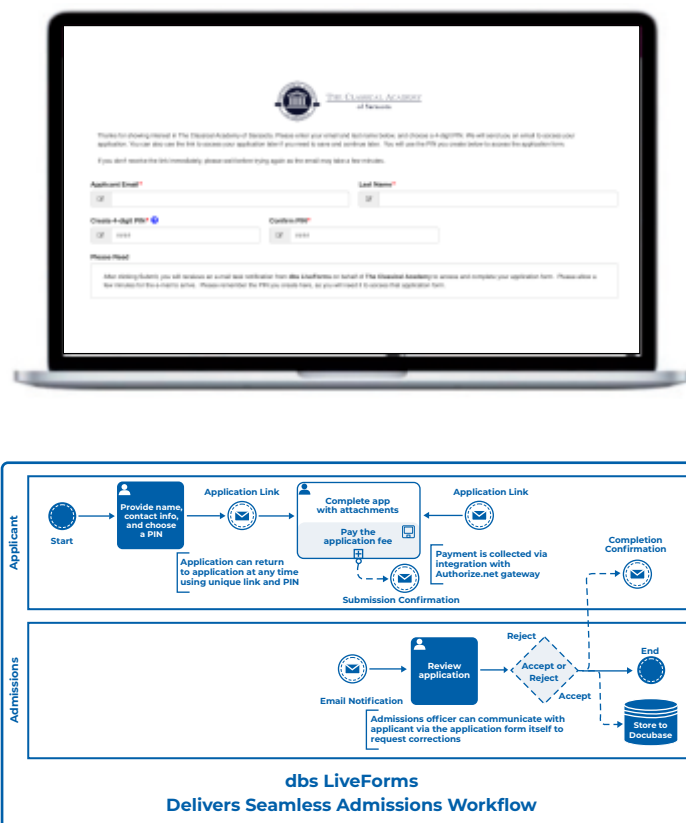
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SUMMARY OF THE SOLUTION

Using dbs LiveForms, together with dbs' client success team, the school created a new streamlined admissions process consisting of a dynamic online application form that can be filled out from any device and submitted electronically, along with all necessary attachments, signatures, and the collection of application fee payment. The completed digital applications are then automatically routed to the admissions officers for review and processing, and when the workflow is finished the application and all its attachments are stored in the student's electronic file in the Docubase Document Management System. This new all digital process makes it easier for prospective students to apply to the school and for the administrators to handle large volumes of applications.

TCA is now looking forward to extending the use of LiveForms to design and manage forms throughout the school including athletic events, field trips, etc., and capturing existing paper records into Docubase to achieve the goal of having a fully digital campus.

DEPLOYED SOLUTION FEATURE SET

- dbs LiveForms with drag and drop forms designer, workflow, and business rules engine.

- LiveForms payment integration to Authorize.net gateway.

- dbs forms design and technical assistance service.

- dbs eSign electronic signature access.

- Docubase Document Management including indexing, secure storage, and retrieve functionality.

dbs LiveForms
Delivers Seamless Admissions Workflow

"Partnering with dbs Software and Services was a very wise choice. Not only did they provide excellent software, but their deep knowledge in education technology enabled them to deploy a revamped electronic admissions form with workflows very quickly. I would recommend them to any school struggling with paper based forms and manual processes!"
~ Lisa Redhead, Registrar, The Classical Academy of Sarasota

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