

OnBase

Benefits

- Form Creator
- Record Management
- Integration with Outlook, Excel & Word
- Secure storage
- Accessible from anywhere

Form Designer

- Create simple, complex and multi page forms
- Attachments are automatically saved and connected to student record
- Office use only sections that can flow to multiple people and/or departments
- Emails can be auto sent to students and or staff within the workflow
- Reports can be built if needed

Example – FA Summer Request Form

Summer Request Form

This financial aid summer request form is for continuing financial aid recipients only.

ctcLink ID#: *

Date of Birth: *

MM/DD/YYYY

First Name: Last Name:

Summer quarter is the last term of the school year and some financial aid funds are limited. Below please check only the boxes that apply to you. Notifications of summer awards should be emailed by mid-June.

☐ I received Federal Pell Grant during the school year, will be attending summer quarter and would like to receive Pell for summer.
Year Round Federal Pell: If you have used 100% of your Federal Pell Grant eligibility for the school year (attended full time fall, winter, spring) you may be eligible to receive additional Federal Pell if you are enrolled in at least 6 credits that are required for your TCC program.
Students who received Federal Pell during the school year and are enrolled for 5 or fewer credits for summer quarter may be eligible to receive the remainder of their Federal Pell Grant eligibility if they did not attend full time during fall, winter and spring terms.

☐ I received the Washington College Grant (WCG) and/or the College Bound Scholarship (CBS) during the school year and will be enrolled for summer quarter.
You must be enrolled for a minimum of 3 credits to receive 25% eligibility of the award.

☐ I will earn my degree/certificate in August by completing my summer course work.
I understand that this will be my final term receiving aid at TCC for this program.

☐ I have been formally accepted into a professional technical program that requires summer attendance.

☐ I am interested in summer work-study employment. I will be enrolled in a minimum of 6 credits for summer that are required for my TCC program.
I understand that if I receive a work-study offer, I am not guaranteed a work-study job. Work-Study is subject to the availability of funds.

By typing my name in the box below I certify that I have read, understand, and agree to the information above and the information is true.

Student Signature: * Date: *

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Submit

FA Summer Request Form - workflow

Student submits form

A message is displayed on the screen to inform the student that processing takes time and that they will receive a new award notification when/if aid has been awarded.

Workflow process

- This workflow has multiple layers depending on what the student selects on the form
- The form flows between financial aid staff members and even has an office use section that the student's advisor may need to complete
- If that option is selected an email is sent to the student's assigned advisor (if no advisor is assigned an email goes to Steve) and the advisor completes the Academic Advisor section of the form
- When the form has been completely processed it is released from the workflow and is saved in the students record

Record Management

- Upload/Scan documents to any student record
- Integration with Outlook – upload email conversations and attachments
- Integration with Microsoft Office - update Excel and Word files in real time in the system
- Share Information between departments
- Retrieve any form or document for review
- Print documents if needed
- Email documents as attachments if needed

Form Creation Process

Each department will designate a “form creator”

Form creators will receive specialized training in how to create forms

Back end process

- 2 people share the load for the back end process for now with hopes to increase in the future
 - Back end = setting up record system and workflows

Each area that chooses to use OnBase will create a record management system for forms to be saved to

Department Record Management

Each department will provide a document type list to be created in OnBase. Each document saved in OnBase is connected to a Document Type. Once this is done you will be able to upload documents and create forms.

Example of Document Types:

Department: Bachelor of Applied Science (BAS)

Admission

Advising/Academics

Clinical

Financial Aid

Graduation

Industry Credentials

Industry License

Leave of Absence

Letter of Recommendation

Program Offer Response

Program Student Signature Pages

Progress Note

Resume

Virtual Information Session Certificate

Form Submission Process

Procedure

- Form Creator will complete the “OnBase Form Request”
 - Forms will follow Best Practices (will be housed in the Portal saved in the Knowledge Base)
 - Very involved process that walks the user through questions to ensure usability and EDI principals are followed
 - Submission of the “OnBase Form Request” puts you in the review queue
 - Review committee reviews request
- Form Creator can begin creating the front end of the form after they receive approval
- Once the form is complete the creator will let back end processors know
 - Back end processors build the workflow and reports if requested
 - Back end process will be completed in the order they are received UNLESS something moves to the front of the list based off of a prioritization rubric

Transparency

The back end process for forms will be completed in the order they are received UNLESS they rise to a higher level of need on the prioritization rubric.

Staff will be able to see where their forms are in the queue.

<https://testtacomacc.sharepoint.com/sites/RecordManagement/SitePages/OnBase-Forms-Pipeline.aspx>

What Tool to Choose

SURVEYS

Surveys collect information that does not contain personally identifiable data, but are geared more towards generalized questions based on large group feedback. They are often used to determine level of satisfaction (Likert scale), or likelihood of a behavior.

Commonly used

- Survey Monkey
- Google Forms
- Microsoft Forms

FORMS

Forms collect individualized information meant to assist in working with a specific individual.

Commonly used:

- Microsoft Forms
- Maxient
- Fillable PDF