

HIGHER EDUCATION | ARTICLE

MODERNIZING THE TRANSFER PROCESS

Three ways automating transcript processing improves the student and staff experience

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Higher education institutions are feeling the effects of changing economic, technological and safety realities that the COVID-19 pandemic has introduced. According to University World News, America's colleges and universities have almost one million fewer students than in 2019, making it more difficult to meet recruitment and revenue goals.ⁱ Many institutions are seeking ways to better attract and enroll transfer students in an effort to maintain enrollment and improve diversity, reports the National Student Clearinghouse.ⁱⁱ

One hurdle in the transfer pathway is outdated transcript processing methods. Manual processing does not offer the agile, seamless experience students have come to expect from digital engagement. In addition to wasting precious time and resources, paper-based transcript evaluation also stretches out the decision period — forcing students to wait weeks or even months for an answer on their admission, course equivalency and financial aid status.

Transfer students have many education options available to them. The ability to provide a smooth, accurate and timely transfer process can be the tipping point at which a student chooses your institution over another.

In this article, we explore three ways that automating transcript capture and evaluation provides faster, more efficient and more accurate credit evaluation decisions — and a better experience for students and the staff who support them.

1. ELIMINATES MANUAL DATA ENTRY WITH INTELLIGENT CAPTURE

On average, each admissions officer processes 461 applications every semester at private institutions and 1,035 at public institutions, according to the 2019 State of College Admissions report.ⁱⁱⁱ

Regardless of whether academic transcripts come in as paper or PDF, admissions staff still need to manually key in essential course and institution information. This process can take up to 20 minutes per transcript, even for a “simple” document. Multiply that by thousands of multiple-page transcripts in a variety of formats, and it's easy to see how much time and money a school can save by eliminating costly, error-prone data entry. Yet, according to University Business' 2021 survey of 200 institutions, only 25 percent are using intelligent capture of transcripts.^{iv}


Automating the transcript process eliminates the need to manually key in data by electronically capturing information from transcripts, freeing staff to use their time for higher-value tasks. Intelligent optical character recognition identifies and extracts the necessary information without human intervention — no matter the document format. This allows staff to process more incoming transcripts in less time. Additionally, storing all transcript data in a central, online location enables staff to instantaneously pull up required information when questions arise.

2. EXPEDITES COURSE EVALUATION AND VERIFICATION WITH AUTOMATED WORKFLOWS

Transcript and credit evaluations that revolve around paper and manual processing require staff to review them by hand — a time-intensive and laborious process that keep students waiting for weeks. By the time your institution can provide equivalency decisions, qualified applicants may already be looking at other schools or enrolled in courses that award no credit toward their degree, which contributes to student dissatisfaction and attrition.

Inside Higher Ed highlights the importance of streamlining the transfer process for transfer student success: “You can't build an equitable pathway with manual, inconsistent policies. Properly applied technical solutions can improve the speed, accuracy, consistency and transparency of the credit equivalency process.”^v

One such solution is automated transcript capture and evaluation, which eliminates the need for manual review in determining an applicant's transfer equivalency report. Courses are compared automatically according to articulation rules in place for each external institution, instantly identifying which credits will or will not transfer. Manual intervention and verification from staff are only required when necessary, which removes process bottlenecks for faster decisions and higher satisfaction.



“Flexible educational opportunities can unlock a student’s potential, so it’s all the more important that colleges and universities proactively remove unnecessary barriers like outdated credit transfer policies and practices.”

Ryan Stowers
Charles Koch Foundation Executive Director¹

3. CONSOLIDATES DATA WITH SIS INTEGRATION

Data that is manually entered into your student information system (SIS) may come from multiple sources, which carries the risk of errors and inefficiencies. Incomplete documents that are routed for faculty review and different versions of the same document existing in the same system are examples of this.

Integrating automated transcript processing with your SIS gives staff a complete view of the student, eliminates manual data entry and improves the ability to build your articulation database. Staff no longer need to pull up multiple screens to enter information from separate databases; one system shares necessary data with the other to reduce errors.

Having student data available and easily accessible from one location helps drive faster decision-making, allowing institutions to act faster, increase productivity and improve the staff and student experience.

SOURCES

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- ii. National Student Clearinghouse, *COVID-19: Transfer, Mobility, and Progress*, 2021.
- iii. National Association for College Admission Counseling, *2019 State of College Admission*, 2019.
- iv. University Business, *Post-Pandemic Priorities for Digital Transformation and Cloud Migration* survey, 2021.
- v. Inside Higher Ed, *Solving for Transfer: Looking Inward While Building Outward*, 2021.
- vi. American Council on Education, *Reimagining Transfer for Student Success*, 2021.

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