



# CampusLogic's Proven Path to Implementation Success: StudentForms

**Your success is our top priority.** We believe that when you implement a technology solution you should know what to expect, so you can prepare for it. With StudentForms, you'll simplify and automate traditionally paper-based financial aid forms and processes—and to top it off, you'll get the fastest implementation in the industry. We're committed to having you implemented in 30 days or less! You'll be guided through our onboarding process by a dedicated Customer Success Manager (CSM).

01

## KICK-OFF

### A KICK-OFF CALL

#### WITH TECH

Collaborate and set goals for on-boarding. Talk through integration touch points and answer any technical Qs you may have, ensuring the process goes smoothly. Be prepared for the next 45 days with a clear view of the weeks ahead.

**Duration:** 60 minutes

#### **i** We'll Cover:

- Goal setting for on-boarding
- How we replicate your brand experience
- Why you have two environments and how to use each
- Overview of desired integrations
- Single Sign-On integration
- CL Connect integrations
- Formalizing integration requirements
- Integration scope for Go Live
- Determining your Go Live date

#### **i** Who Should Attend?

##### You bring:

- Sponsor
- Project Owner
- IT Lead for Network
- SSO Specialist
- SIS Database Administrator

##### We'll bring:

- Customer Success Manager
- Customer Integration Manager

#### WITHOUT TECH

Collaborate and set goals for on-boarding. Be prepared for the next 30 days with a clear view of the weeks ahead.

**Duration:** 60 minutes

#### **i** We'll Cover:

- Goal setting for on-boarding
- How we replicate your brand experience
- Why you have two environments and how to use each
- Determining your Go Live date

#### **i** Who Should Attend?

##### You bring:

- Sponsor
- Project Owner

##### We'll bring:

- Customer Success Manager

### B CL DEMO KICK-OFF

Invite everyone who will be involved with StudentForms to see it in action.

**Duration:** 60 minutes

#### **i** We'll Cover:

- How easy it is for students and staff to use StudentForms

#### **i** Who Should Attend?

##### You bring:

- Anyone who will use or be involved with CampusLogic

##### We'll bring:

- Regional Director
- Customer Success Manager

02

## STRATEGY

### A PROCESS CHANGE

Discuss what will need to start, stop, and continue so that your team can thrive as they transition to mobile, paperless financial aid.

**Duration:** 90 minutes

#### We'll Cover:

- Your current process flow
- Your new process flow
- What you should start, stop, continue
- What Policy/Procedures you may want to adjust

#### Who Should Attend?

##### You bring:

- Sponsor
- Project owner

##### We'll bring:

- Customer Success Manager

### B BASIC SET-UP

Establish the basic settings for your account and begin to plan for how to customize future communications. Establish timing for notifications and alerts intended for students.

**Duration:** 60-90 minutes

#### We'll Cover:

- Adding school users
- School settings: contact info, communication to students, and documents
- Personalize your student notifications and alerts

#### Who Should Attend?

##### You bring:

- Project owner

##### We'll bring:

- Customer Success Manager

03

## COACHING

### A STUDENT EXPERIENCE TRAINING

Walk through exactly what your students will experience when they start using StudentForms.

**Duration:** 60 minutes

#### We'll Cover:

- Student login, account creation, student task completion, parent e-sign, automated reminders
- Help-desk overview: student search options, student account page, student transaction page, knowledge base

#### Who Should Attend?

##### You bring:

- Project owner
- Onboarding team

##### We'll bring:

- Customer Success Manager

### B SCHOOL ADMIN TRAINING

Walk through exactly what your financial aid office administrators will experience as they perform verifications.

**Duration:** 60 minutes

#### We'll Cover:

- Administration processes including: user login screen, account page, transactions page, student view tab, file review, reports and support

#### Who Should Attend?

##### You bring:

- Project owner
- Onboarding team

##### We'll bring:

- Customer Success Manager

### C SAP AND PJ APPEALS TRAINING

Walk through exactly what your students and financial aid office administrators will experience as they work through SAP and PJ Appeals.

**Duration:** 60 minutes

#### We'll Cover:

- Setting up the system to use SAP and PJ, bulk upload of SAP appeals, and manually assigning appeals
- Students ability to request appeals; completing the appeal as the student

#### Who Should Attend?

##### You bring:

- Project owner
- Onboarding team

##### We'll bring:

- Customer Success Manager

04

## GO-LIVE PREP

### HANDS-ON PRACTICE

Gain hands-on experience using test ISIRs loaded into your Sandbox. We'll practice, practice and practice some more.

**Duration:** 90 minutes

#### We'll Cover:

- Creating the student account
- Completing student tasks
- Reviewing submitted documents
- Smart File Review

#### Who Should Attend?

##### **You bring:**

- Project owner
- Onboarding team

##### **We'll bring:**

- Customer Success Manager



## GO LIVE!

**You are now ready** to deliver the benefits of StudentForms to both your students and staff. CampusLogic is happy you chose us to help you customize workflows, personalize forms, and create easier, more efficient experiences with fewer errors. Your CSM will continue to be your main point of contact going forward and will work with you to ensure your success.

**It's time to automate time-consuming processes & change student lives with StudentForms.**

