

Southern Methodist University Supports Stronger Student Engagement with StudentForms



Southern Methodist University (SMU), located in Dallas, Texas, educates around 12,000 students each year. Among their student body, around 75% receive some form of financial aid. Nearly half of the student body files for federal aid, and many seek state grants.

With such a large population of students looking to receive financial assistance, the financial aid team at SMU plays a critical role in student success. But their team had a problem: Manual financial aid processes.

Supporting the next generation when you're behind the times is impossible

Before CampusLogic, Southern Methodist University students had options when it came to completing their financial aid paperwork. Chris Walerczyk, Assistant Director – Financial Aid Application Processing at SMU, said none of them were viable long-term solutions.

“Students could email, drop off, mail or fax their paperwork to us,” he said. “From there, once they’d check in their documents, we’d get them into imaging, so paperwork didn’t go missing. But it was a long process.”

Getting documents collected and turned in was a major struggle for students, says Walerczyk. Whether it was calling students or manually nudging them to complete paperwork, too much was getting lost in translation. Staff were looking to streamline the financial aid process with automation and efficiencies that would keep action items organized and digitized paperwork.

Beyond anything else, SMU’s financial aid team wanted students to have an easy, simple-to-follow experience, where they received clear next steps in a single place.

“Tedious processes were taking their toll on students and staff, and the financial aid team knew the institution needed something new,” Walerczyk says.

Smoother processes from the start, thanks to StudentForms

After deciding to partner with CampusLogic, the SMU team was excited about learning new technology and onboarding a new system. “There really isn’t ever a time when you can turn things off,” Walerczyk says. “We chose a go-live in September, so we could help catch the new incoming class in the Fall and have the new service in place before winter break.”

Walerczyk says the transition and fit were natural with StudentForms. Students and financial aid staff alike felt the relief immediately. “They were

all flabbergasted,” he continued. “We went live at around 9 or 10 p.m., and they had documents in the very next day. We were shocked that they submitted them correctly with every page included. Everything was smooth.”

And 2021 saw the best year yet for completion at SMU: More than 6600 ISIRs were filed, and 680 were selected for verification.

Of that number, only 12 percent didn’t complete verification in 2021. That’s a 43% improvement over the previous year.

Smarter Students with StudentForms

Before StudentForms, Walercyzk said most student questions were asking routine, frequently asked questions. After StudentForms, Walercyzk notes that student questions are different; they’re smarter. “Students are asking different questions than they were before,” he says. “StudentForms outlines tasks; it provides context around what the task is and why that task is important. Students know what questions to ask, and staff can help them navigate that answer.”

Beyond receiving better student questions, Walercyzk discussed some of the other benefits his staff has experienced since implementing StudentForms. While staff previously trudged through verification paperwork, automation—specifically for communications to students through texting—has enabled staff to shift their focus.

“It has opened us up to look at students more holistically and spend more time paying attention to the needs of each individual student.”



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