



S3 DEPLOYS IDENTIFI

ECM SUITE TO 3 BANKS

S3 Deploys iDentifi ECM Suite of Products for Document Imaging, eSignature and Document Tracking

Open Technology Solutions (OTS) is the CUSO for **Bethpage Federal Credit Union, Bellco** and **SECU**, which have over \$10.5 billion in combined assets.

The three partner Credit Unions are supported by a centralized Operations Center called S3 – **Shared Service Solutions, LLC**. Each Credit Union has their own iDentifi Server running on their network.

Scan stations are located at S3, to assist in making correspondence available in one business day. Multi-function printers are also used to scan general mail (including loan payments, collections, insurance, etc.) totaling over thousands of documents per week across all three Credit Unions. This has made the elimination of Mail/Courier service possible.

Bethpage and Bellco are running the iDentifi.WEB repository with hundreds of users employing electronic signature, e-receipt, scan stations and E-Report. Bellco and SECU also run the iDentifi.Trak module to avoid audit exceptions. Tracking includes automatic e-mail notifications and reports when documents are pending or in exception. Exceptions are automatically cleared when documents are added into the iDentifi.WEB repository. If documents are recurring; ticklers are automatically reset at the point of recurrence.

- E-Receipt (for paperless receipts) works with signature pads, as well as with Ingencio and Pax units at the teller, which interface with the Verifast Solution from Fiserv/Open Solutions Inc. This one unit can be used for swiping and signature. The Credit Unions are using the dual logo feature of e-Receipt for shared branch transactions.

- All three credit unions are using e-sign for loan documents and new account signature cards. Documents are scanned with automatic indexing provided through barcodes that integrate with core by reading the core data file for indexing.

- It is ideal to have one central repository for all your information. The iDentifi.WEB repository imports the following automatically:

- Velocity and Empower Loan Documents
- XDI Akcelerant Collection Notices
- IRA Documents

- Information can be accessed through Fiserv/Open Solutions DNA Core, or directly through the KWYK (Key What You Know) search engine which is part of the .NET iDentifi.WEB repository.

- E-Report is not just limited to the downloaded Fiserv/Open Solutions reports, but also includes auto indexing of Elan Reports, WITS (wire transfer reports from Pathfinder), FDR Reports, IS Reports, ERAS Reports, Fidelity Reports, Co-Op reports and abandoned property reports. Conversions can be supported from the legacy systems; Synergy, DocStar, Spoolview and Aace.