



A DOCUMENT
MANAGEMENT
PARTNER THAT
HELPS YOU MEET
YOUR FIDUCIARY
DUTY TO CLIENTS
AND MAINTAIN
REGULATORY
COMPLIANCE
MAKES ALL THE
DIFFERENCE.

REGULATORY COMPLIANCE FOR 55,000 MEMBERS

APPLICATION

A Credit Union with twelve branch locations and 55,000 members realized during the renovation of their corporate office, they needed a more secure process for managing highly sensitive client data.

CHALLENGE

Storing records in house wouldn't be a comprehensive solution for their twelve branch offices when it was time to locate a record. Additionally, storing paper would take up valuable space in their newly renovated headquarters. Adhering to the best practice in the Financial Services Industry, the Credit Union contacted SRS to determine the best option for outsourcing document management.

SOLUTION

SRS proposed a document management solution, which would meet their immediate need of both maintaining records in a more secure manner and freeing up valuable office space. The SRS team packed up 600 boxes of records and transported them to SRS' secure facility. Then indexed the records at the file level applying the Credit Union's retention policy to automate digital access and destruction of records for years to come.

RESULT

This solution resulted in a much more efficient way to access paper records digitally, while also improving accessibility and compliance. Instead of team members spending time pouring through old files located in numerous locations to find the one they needed, they could simply query the database SRS created for them reclaiming both their physical space, time and focus.

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