



FINANCIAL SERVICES | CUSTOMER SUCCESS

SUNCOAST CREDIT UNION

Credit union uses enterprise workflows to accommodate growth

THE CHALLENGE

In 1998, Suncoast Schools Federal Credit Union realized that relying on paper was negatively impacting member service. So in 2000, it implemented OnBase, Hyland's enterprise information platform, to capture documents and information electronically.

The increased speed and accuracy of processes improved member service significantly. But after converting from a federal to a state charter in 2014, newly named Suncoast Credit Union needed to ensure important processes were ready to accommodate growth.

THE SOLUTION

With OnBase on every computer in 54 locations up and down the west coast of Florida, Suncoast has grown to give more than 1,500 users instant access to almost 550 million documents. But that's only the beginning of the story.

Utilizing workflows to increase speed and accuracy

Behind the scenes, more than 150 workflows keep things moving by automatically forwarding information and documents through processes, notifying the right people as required.

A great example is the process Suncoast automated for domestic and international wire transfers. Instead of relying on paper, now branches and the call center manage member requests for wires with electronic forms that initiate OnBase workflows. The workflows then automatically notify the Electronic Funds Transfer (EFT) department, reducing processing time from one hour to three minutes.

To make sure important information is easily shared across departments, Suncoast integrated the OnBase wire workflows with Summit core and FedLine Direct. The automated process pulls history from the core and stores all related information as part of the wire record. Built-in rules for levels of

approval alert the appropriate people should a wire exceed the back-office limit, keeping the process moving quickly and accurately.

“With the ability to easily create workflows and get help complying with regulations, our return on investment is immeasurable.”

Wanda Chambers
Senior Vice President
Payment Services



LOCATION

Tampa, Florida

SIZE

More than \$6.6 billion in assets
673,000 members
54 branches

ONBASE INTEGRATIONS

Symitar Episys
Summit banking system
FedLine Direct
APPRO
LoanCenter consumer loan processing software
SQN Banking Systems SENTRY: Safe deposit management software

Internally developed Titan front-end platform
Eastman Kodak Company 3500-series scanners
Canon U.S.A., Inc. DR-9080C color production scanners
Datawatch Corp. Monarch Report Mining software

DEPARTMENTS USING ONBASE

Enterprise-wide

“ We chose OnBase because we wanted something that would scale with us, and we needed a dynamic solution that would be easy to maintain.”

Wanda Chambers
Senior Vice President
Payment Services

“Whenever we face process issues, people always say, ‘Let’s create a workflow.’ There’s even a workflow for employees to suggest new workflows,” said Dulcey Hordge, vice president of Document Services.

Integrating systems to increase communication

In 2015, Suncoast converted to the Symitar Episys core solution. Even though the new core offers its own enterprise content management (ECM) solution, the credit union kept its OnBase solution in place, as it had become a mission-critical system.

Because OnBase integrates with any core — and more than 500 different applications without custom coding — the credit union knows it already has a “gold standard” ECM solution that will evolve with it as the pace of business picks up steam or other surrounding technologies change.

Suncoast also integrated OnBase with its front-end capture platform. Seamless integrations like these allow for easy communication between OnBase and other important systems. Meanwhile, users continue to work in familiar environments, simplifying training and enhancing the user experience.

Enabling growth with simplicity

To continue growing, Suncoast switched charters to allow it to increase membership by broadening its community base in Florida.

“Switching to a state and community charter is a far simpler way for us to operate,” said Suncoast President and CEO Tom Dorety.

That’s why the credit union relies so heavily on workflows — to make life simpler. With increased visibility and accuracy, Suncoast is not only prepared for growth, but it also proactively complies with regulations like the Consumer Financial Protection Bureau’s International Money Transfer Protection rules.

THE RETURN ON INVESTMENT

Enables growth: The flexibility of OnBase lets it evolve with Suncoast’s growth and market requirements with limited additional investment.

Makes processes simpler and faster: Processes are automated, user-friendly, convenient and easy — like capturing member IDs electronically so they’re always a click away.

Empowers member service: With instant access to information and documents, employees have more time to focus on members.

Integrates systems: Tight integrations with multiple line-of-business applications empower employees to find information without leaving familiar screens.

Helps with compliance and audits: Easy access to information and increased visibility into processes allow Suncoast to proactively deal with regulations and audits.

Learn more at Hyland.com/CreditUnions

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