



## Enhanced Account Revision

*Updates and Changes in Episys® Made Simple*



## Updates and Changes in Episys® Made Simple

### BUSINESS VALUE

- Enhance Service
- Improve Operations

### COMPATIBILITY

- Episys®

Your credit union can now control workflow steps and requirements for standard account revision functions, incorporate processes used elsewhere in Episys, or customize new functions based on business needs all through one user-friendly interface. Enhanced Account Revision is a unidirectional, near-real-time, customizable program designed to simplify file maintenance changes to account and share records.

### IT WORKS LIKE THIS ...

Offering a centralized location to perform common account updates such as changes to account or share ownership, revisions to account or share name records, or additions of new shares and other account options, Enhanced Account Revision lets your member services team or front-line staff easily:

- Update prime name information
- Update account and share names
- Create and revise mail names
- Add account name types to the account record
- Add share names to existing shares
- Add new shares
- Print documents
- Set up and create new transfer records for overdrafts
- Update home banking and audio banking access settings

In addition to core integration with Episys, Enhanced Account Revision also delivers seamless compatibility with our Episys Credit Retrieval and Episys ChexSystems modules, the Episys® ID Scanner Interface™, *jhaAddress Verify*™, and Episys® Identity Q&A Integration™.

### WHAT IT DOES:

- A centralized location to perform common account updates like:
  - ✓ Update prime name information
  - ✓ Update account and share names
  - ✓ Create and revise mail names
  - ✓ Add account name types to the Account record
  - ✓ Add share names to existing shares
  - ✓ Add new shares
  - ✓ Print documents
  - ✓ Set up and create new transfer records for overdrafts
  - ✓ Update home banking and audio banking access settings.

### WHAT IT DOES FOR YOU:

- Enables superior control of workflow steps and requirements for standard account revision functions.
- Offers a user-friendly interface that helps you incorporate processes used elsewhere in Episys.
- Empowers you to customize new functions based on business needs.