Enhanced Member Application™

Better Manage the Entry and Completion
of Your Membership Applications

Symitar®
A JACK HENRY COMPANY

Does your front-line staff waste too much time creating member applications?

BUSINESS VALUE

‣ Enhance Service

‣ Improve
Operations

COMPATIBILITY

‣ Episys®

A credit union's member base defines its level of success. While retaining members is a crucial aspect of a credit union's sustainability, enlisting new members drives growth. Time spent creating member applications takes away from the personalized service your members deserve. Symitar's Enhanced Member Application (EMA) solution automates the application process allowing your staff to focus its attention back to your members.

IT WORKS LIKE THIS ...

Symitar's EMA delivers credit unions an efficient and automated solution to manage the entry and completion of a membership application. EMA handles the entire setup of new credit union members and their initial account records, including funding. Aside from handling the new member application process, EMA manages existing accounts. Credit unions can now add additional accounts and update basic information to the member's profile initially created in EMA. The completely customizable interface allows credit unions to meet their own process and product needs.

CREATE COMPREHENSIVE RECORDS, ENHANCE MEMBER SERVICE

Using EMA, credit unions can automatically create name records at either the account or share level. They can establish Internet banking and statement preferences, create overdraft transfer records on and from credit union-defined shares, order checks and print starter checks, and create card records for ATM or debit cards at the point of account creation.

Using EMA, credit unions can add new members in just minutes.

SECURE MEMBER VERIFICATION = PEACE OF MIND

Symitar's EMA solution lets credit union staff create a member record in an alternate "dummy account" to verify member information before creating a live account. Support for the Episys® Credit Retrieval System, the ChexSystems® interface, and OFAC verification enables the user to make setup checks before a new member account is finalized. Security for approvals by user and account type provides credit unions visibility and control of the account setup process.

AUTOMATED, INTEGRATED, AND EFFICIENT

Seamless integration into Symitar's core Episys platform and an intuitive user interface minimizes training time, reduces user error in the membership application process, and provides a faster, more efficient way to establish new credit union members and initial account records. Using EMA, credit unions can add new members in just minutes.

FULL-SUPPORT SUBSCRIPTION PLAN

EMA's annual subscription plan includes phone support, access to template updates, and up to 30 hours of custom requirements, estimating, and programming time per year.

EMA delivers credit unions an efficient and automated solution to manage the entry and completion of a membership application.

WHAT IT DOES:

‣ Automatically handles the setup of new credit union members and their initial account records, including funding.

‣ Manages existing accounts.

‣ Supports Episys' Credit Retrieval System for pulling individual credit reports.

‣ Integrates with the Episys ChexSystems interface for pulling ChexSystems or QualiFile® reports.

‣ Includes OFAC verification.

‣ Allows an application to be created in an alternate "dummy account" before assigning a membership number.

‣ Restricts new member approvals by user and account type.

‣ Includes automated forward and e-mail capability.

‣ Includes a document/print form organizer based on account type.

WHAT IT DOES FOR YOU:

‣ Enables you to add members in just minutes.

‣ Reduces errors in the membership application process.

‣ Effectively manages credit report and OFAC checking as part of the account setup process.

‣ Provides a fast, efficient way to set up initial account records.

‣ Helps you deliver the best account service to your members.

The EMA software is a critical component of Symitar's Professional Services offerings. Designed to further streamline operations, EMA assists credit unions in maximizing the day-to-day use of technology-based solutions.

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