



Fast Access to Information to Improve Risk Management & Customer Service



As a result of exceptional growth, employees at our customers Loan Department would soon be moving to a larger facility. This meant the department's paper files would move as well, away from many other employees who need access to them. The impending move became a catalyst for the financial institution to find a records management system that would provide all its locations access to the Loan Department's files.

After reviewing eight vendors, the bank's evaluation committee chose FusionRMS because it was easy to use and aligned closely with key banking operations—such as loan and deposit documentation and compliance. Our customer's non-technical financial services staff needed an easy-to-use system for scanning, storing, tracking and sharing documents; quickly accessing information; and meeting industry compliance requirements.

Tremendous value

Today, with TAB FusionRMS, the Loan Department scans all consumer, residential and commercial loan documents, and credit reports into the system. Instead of having to run back and forth searching for paper documents, bank personnel—no matter where they are—have the information they need at their fingertips electronically.

Reporting is one of the biggest assets FusionRMS provides, which saves an enormous amount of time in providing important compliance and audit information. "We can drill down to find every loan that's been approved by an individual officer during a specific time period," the Senior Loan Officer explains. "In addition, the reporting function helps us identify potential issues, so we're making better loan decisions."

“FusionRMS is a godsend. Everybody can get online information very quickly, which leads to better credit decisions and an improved loan committee function. And just as important, we’re delivering great customer service.”

—A Satisfied Customer

The bank’s Financial Management Group scans all daily work into the system, including share trades and loan files, providing an audit trail as well as detailed information for reporting. Deposit Operations scans all signature cards, driver’s licenses, e-banking forms, and daily operating forms into the system, enabling tellers to more quickly verify customers’ identities for check cashing. FusionRMS exceeded the bank’s expectations on many fronts, including how quickly it was implemented and how little employee training was required. “The TAB Records Management System is so thoughtfully and logically laid out that even employees who typically struggle with technology learned this system in just one demonstration,” the President and Senior Loan Officer said. “I’ve worked with a lot of software companies, and normally we don’t get the level of service that FusionRMS provides,” he says. “They even came up with a way for us to scan images into the system faster. We now have over 3.3 million documents in the system.” According to the President, FusionRMS meet 95 percent of their needs. “I couldn’t imagine living without it. We have made it such a backbone of our operations that we consider it critical software. With TAB FusionRMS, we can meet our anticipated growth and more.”

FusionRMS Solutions

- A single, integrated digital system manages over 3.3 million documents (and growing) for integral financial services operations.
- The ability to drill down for information enables more responsive decision-making.
- Quicker access to documentation improves risk management.
- Fast signature card validation and access to driver’s licenses improve customer service.
- FusionRMS’ expert support and programming ensured the easy-to-use system was installed and in use within three months.

“As a publicly traded corporation, we’re subject to greater scrutiny and additional rules and regulations. So we wanted to make sure we were dealing with a large, sophisticated entity—one that has been around for a while and we could trust with our sensitive data”

At TAB, we are proud of our track record of successful client relationships, resulting in over 1,000,000,000 client records managed through FusionRMS.

We look forward to working with you!
Visit our website below.

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