

Regardless of what vault you use, there is no substitute for your due diligence when it comes to your archived images.

Even the best imaging system is not perfect. There are a lot of moving parts and people involved every day to make it all work. There is always the risk that one of these components will fail. As a result, data can be lost or damaged. Therefore, it is important that you do not take any image storage system completely for granted.

Do not let solid solutions or capable vendors lull you into a mindset that can put you at risk. It's your data, and ultimately it is your responsibility to ensure your images are archived correctly.

What should you do to ensure your images are archived correctly?

Be sure your due diligence includes the following:

- Make sure your tellers, loan officers and MSRs take the extra minute to double-check that documents sent to the vault actually made it there.
- Before you get rid of your originals, be sure to scan the vault to make sure all documents are present and accounted for.
- Have a contingency plan for the day when those images don't happen to be available for one reason or another.

Just because someone clicked "save" does not necessarily mean the image actually was saved successfully. Although during peak times it might take several minutes for the processing to complete, it's still worth the time to check back after a bit to **make sure the documents you just saved are where you expect them to be**, and that they can all be viewed with no errors.

With the new  buttons now sprinkled throughout CU*BASE, it's easier than ever to take a quick peek for peace of mind. Make it a new habit!

This is how you can recreate documents that did not make it safely to the vault.

If you have the source document:

Rescan the documents into your imaging system.

If you do not have the source documents to rescan:

Photo IDs: Uncheck the *Photo ID* checkbox on the Secondary Names screen. This will prompt the teller to rescan the member's ID the next time they visit your branch. The Secondary Names screen can be accessed via Inquiry, and then clicking the *Secondary Names* button.

Loan Forms: You may reprint the loan forms without a signature using CU*BASE. To do this use **Print Loan Forms** on the Lending Functions (MNLOAN) menu. Enter in the account number and suffix of the loan and press Enter. Then using the list at the bottom of the screen as a guide, complete the *Form(s) to Print* fields for each of the forms you wish to print. Use Enter to begin printing. Once they display in your imaging system, you can save them to the archive as usual.

Receipts: You may use CU*BASE to reprint a receipt without a signature (last 90 days only). To reprint do this, use Phone Operator. Once the account is entered, select the suffix, and then *History*. Transactions with receipts will have a dot in the *Print Receipt* column. Click the dot and then use *Print* to reprint the receipt. Once they display in your imaging system, you can save them to the archive as usual. (CU*SPY users, you may also have this receipt on a CU*Archives DVD.)

Questions?

Contact our imaging solutions experts.

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