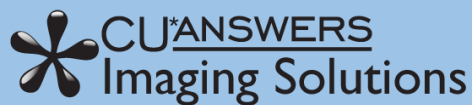


Supplemental Services

**For Online & In-House
Document Solutions**

Strategic document-imaging tactics and solutions
for CU*BASE core processing credit unions

Brought to you by



CU*ANSWERS

Guaranteeing the difference

Who is the CU*Answers Imaging Solutions team?

The CU*Answers Imaging Solutions team puts some serious talent in your corner!

- One Imaging Strategist with 16 years experience working eDocuments exclusively in the credit union space.
- Three dedicated programmers working on Imaging Solutions.
- Two Account Executives with years of CU*BASE systems experience, leading on implementations.
- One Account Executive with 10 years experience in data center operations, leading the Account Executive Team.

How are they helping you with your Imaging Strategy?

This team has created imaging solutions that are an inherent part of your core data processing system.

They've accomplished this by having their Imaging Strategist and programmers work directly with the VP of Software Development for both CU*BASE and the **It's Me 247** online and mobile banking suite. Together they have created solutions that fit hand in glove with your core processing tools to make your imaging solution an integral part of your day-to-day operations.

Beyond the software tools, this team is following through with the exceptional services listed in this brochure that you've come to expect from CU*Answers. Now you can leverage this critical team for making your imaging solution top notch and all you wish it to be.

System Management Services

One-time In-house Software Update



Need your system updated just this once? Let us help!

COST: Bid per engagement, after discovery (typically runs between \$500 and \$2,000 per engagement)

Updates for special situations

Need help with your updates, just this once? Perhaps your team is swamped and you aren't getting to it. Maybe this is a particularly tricky update and you are unsure. We'll take care of it so you can rest easy.

What you get:

- ☑ We will discuss your needs and the nature of the update.
- ☑ We will provide a bid with a Statement of Work.
- ☑ We will apply the update and inform you of the results.
- ☑ We will work with you to verify the results.



Full Service Release Management



Guaranteeing the difference for CUs with in-house vaults

Full release management + monitoring

With our full-service release management, we not only provide the tools, **we also keep your system up-to-date for you** and in lockstep with CU*BASE and **It's Me 247** releases. You take care of your members and we take care of your system. Never miss out on a feature again!

COST: \$2,000 setup fee

Monthly fee based on membership:

<15,000 mbrs	\$150/month
15,001-30,000 mbrs	\$250/month
>30,000 mbrs	\$350/month
1-year term	

What you get:

- ☑ Documented, certified releases, installed for you.
- ☑ Vault Manager Module - so you can be assured data is flowing and critical components are working as they should.
- ☑ We will provide a report of:
 - Any images without an entry in the database (orphaned images)
 - Any missing documents (documents that have database entries but don't exist in the vault)
 - Count of documents by type
 - Recommendations based on observations
- ☑ Release training to help your team understand what's in the release and how to leverage it to the fullest.
- ☑ We will apply updates to definition files for CU*Answers forms programming changes.

Online Tax Forms



Let your members self-service!

With our online tax forms, offering your members tax forms will be made available to them right from within **It's Me 247** online banking alongside their account statements so they no longer need to contact you for a lost or misplaced form. In addition, we'll make them available to your staff from within CU*BASE. This service is available to any credit union using CU*Spy for member eStatements and CUs with Release Managed in-house vaults.

COST: \$500 annual fee

What you get:

- ☑ We will load your members' tax forms in CU*Spy so they are viewable to members via online banking. (Excluding form 1099 MISC & 1042-S)
- ☑ We will also load them in your in-house vault if you are release managed.
- ☑ We will retain them online for 3 years.
- ☑ You can still get disks of your tax forms for longer term storage if desired. (fees apply)

Imaging Strategy Consulting



Don't throw money at tactics just hoping for a return... engage our experts and make your decisions count

COST: \$500 + \$1,000/day on site
Plus T&E
Usual engagement is one day

On-site engagement

Not sure where to start with your strategy? We can help! We have years of experience helping credit unions get started with imaging. Already started but things not quite working out as planned? We can **help you build a roadmap and plan**, so you can reach your goals.

What you get:

- ☑ A deep dive by our expert into your credit union's objectives and goals, current strategy and culture.
- ☑ A written strategy completed with input from management that includes recommendations and findings that your team can take to task to get your strategy on track.

Tune Up Consulting and Training



Not getting the results you hoped? Losing expertise to turnover and now you're lost, too? We can help!

COST: \$500 + \$1,000/day on site
Plus T&E
Usual engagement is one day

On-site engagement

Not getting what you wanted out of your system, or maybe never got it completely off the ground? Did your intellectual capital just walk out the door? Then this service is for you. Don't let turnover stop you from getting the most out of your system. We can do **training in any area of the system** to get you back on track.

What you get:

- ☑ We will discuss your needs with you, come to your site and look over your shoulder at your process, then make recommendations for best practices.
- ☑ We will look at your server configuration and health and make recommendations.
- ☑ Custom training in any area of the system, based on need.
- ☑ We can even take the system configuration recommendations to task for you, if you wish (*additional fees may apply*).



Photo ID Import



Making it easier to convert your images to the online vault

Import photo IDs into the Online Vault

Want to import existing photo IDs from your existing system as part of your conversion? No need to hassle members again for a new scan; we may be able to import your images from your existing system into the online vault.

**Restrictions apply; not every format can be imported. We'll evaluate your project then provide a quote based on feasibility and specific job requirements.*

COST: Bid per engagement after discovery (typically runs between \$750 and \$1,500 per engagement)

*Restrictions apply**

What you get:

- ☒ We will analyze your data to determine suitability. At a minimum we will require an SSN index.
- ☒ We will provide a bid with a Statement of Work.
- ☒ We will perform the work and import the data.
- ☒ We will require you to verify it.



Data Export from the Online Vault



We're sorry to see you go, but it's your data...take it with you!

Export images to DVD and/or raw data

If you are de-converting, we can give you a bid to get your data placed on DVDs that are encrypted, searchable and viewable. We can also provide data in a raw format that is more easily ingested into a new system.

COST:

Raw format: \$200 per data type

Searchable/viewable DVD: \$100/ea

What you get:

- ☐ We will ask what format you want, then will provide a bid with a Statement of Work.
- ☐ We will perform the work and provide the data.
- ☐ We can provide sample data if you wish.

In-House Forms & Packages Setup



Need some new forms set up but don't remember how?

COST:

\$150 per form

\$150 per package

Per form / package setup services

Got some new forms programmed in CU*BASE but need them set up in packages or for e-signing? We can help with that. Want to capture that miscellaneous member form or credit union-generated form? No problem. We can get those set up in your in-house imaging solution.

What you get:

- ☑ We will discuss your needs then provide a bid.
- ☑ We will program your forms and configure them to work with packages and e-signing if needed.
- ☑ We will verify the work and ask you to do the same.



eDOC Signature Conversion



Reach your members wherever their smart devices take them and get business done!

COST: \$150

Plus forms activation @ \$15/form
\$10 each for 10 or more.

eDOC Signature conversion

Now you can get documents signed by your members wherever they are with eDOC Signature. Simply put in their name and email address and they will get an email with instructions on how to sign their documents securely. They click the link, go to the secure server, adopt their signature, then click and sign. It's that easy!

What you get:

- ☑ Your system configured to allow you to begin signing documents remotely.
- ☑ Your forms activated for remote signature.
- ☑ Web based training.



Online & In-House Solutions from
CU*ANSWERS
Imaging Solutions

Server Migration Services



**Hardware getting old and tired? Getting a new server?
Moving to a different environment?**

COST: Bid per engagement after discovery (typically runs between \$1,000 and \$2,500 per engagement)

One-time in-house server migration

Migrating your existing system to a new hardware environment can be a complex process with many steps. No worries! Engage our experts to handle it for you.

What you get:

- ☑ We will discuss your needs then provide a bid with a Statement of Work.
- ☑ We will update your system to the latest version of the applications, if you wish.
- ☑ We will work around your schedule.
- ☑ We will verify the work and ask you to do the same.



My Virtual StrongBox



Get in the document transfer business with your members today!

COST: *Free! For standard model. Premium model quote provided upon request.

My Virtual StrongBox

Now you can get into the document transfer business with your members today for free! That's right you can now easily send receipts and loan forms directly to your member's own "virtual strongbox" with the click of a button. Your members in turn can easily access these documents right from online banking. You may also choose to invest in the premium version of My Virtual StrongBox that allows your members to store all their critical personal documents like wills, trusts and medical papers where they are easily accessible on the Internet through a trusted partner, their credit union.

**Credit unions with an in-house vault not subscribed to Imaging Solutions Release Management will need to coordinate their updates with eDOC Innovations.*

What you get:

- ☑ We will configure your Virtual StrongBox handoff from It's Me 247 for your members.
- ☑ We will update your ProDOC software to include the necessary components for sending documents to members.
- ☑ We will train you how to use this to send documents to your members.



Questions?

For questions about the solutions available to you or any other aspect of your imaging strategy, contact a member of the Imaging Solutions team.

Imaging Solutions Team

John Beauchamp, VP of Imaging Solutions

800.327.3478 or 616-285-5711 x228

imaging@cuanswers.com

For information on network management or disaster recovery and high availability, contact a member of the Network Services team.

Network Services

Matt Sawtell, AVP Managed Technology Services

866.458.1174 or 616.974.1174 x177

helpdesk@cuanswers.com

Don't have an imaging solution yet?
We offer both online and in-house solutions! Check out this document located here:

<http://www.cuanswers.com/wp-content/uploads/DocumentSolutions.pdf>



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