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SRS has been an incredible partner in helping us modernize our document management processes. From large-scale digitization projects to ongoing scanning and shredding, they've tailored their solutions to meet our needs. Their expertise has allowed us to focus on what we do best - serving our members.

*– Thomas Flowers
President, Calhoun
Liberty Credit Union*

MODERNIZING DOCUMENT MANAGEMENT FOR FINANCIAL INSTITUTIONS

APPLICATION

Calhoun Liberty Credit Union (CLCU), based in Florida, needed to modernize its document management system. With over 200 boxes of paper records, they aimed to digitize permanent files and securely store the rest. After acquiring the Florida Rural Electric Credit Union, they faced a similar challenge with 300 additional boxes across multiple locations. Swift consolidation was essential for maintaining compliance and operational efficiency.

CHALLENGE

Following the Covid-19 pandemic, CLCU's audits transitioned to virtual formats, requiring quick and reliable digital access to records. Managing large volumes of paper while ensuring compliance posed logistical difficulties. Additionally, the acquisition of Florida Rural Electric Credit Union added complexity, as records from multiple locations needed to be consolidated into one management system.

SOLUTION

Secure Records Solutions (SRS) indexed 200 boxes and digitized about 50%, storing the rest securely. SRS also provided CLCU with a digital document management solution, ensuring all records could be accessed through a centralized, cloud-based system. Permanent files were uploaded into this platform, streamlining access and improving efficiency. To prevent backlogs, we established a continuous scanning service, with CLCU sending new boxes at least once per quarter. For the Florida Rural Electric Credit Union acquisition, we applied the same strategy. After evaluating the 300 boxes, one-third were shredded, one-third digitized, and one-third securely stored. This approach helped CLCU reduce storage costs, improve accessibility, and maintain compliance.

RESULT

With SRS as their document management partner, CLCU has full control over their records. Auditors can access files digitally, improving audit speed and efficiency. Eliminating unnecessary physical storage and implementing continuous scanning has streamlined operations and enhanced compliance. Ongoing shredding and secure storage ensure long-term record management and compliance.