Hyland

RED CANOE CREDIT UNION

OnBase and DocuSign integration enhances member service

THE CHALLENGE

Red Canoe Credit Union takes pride in what imaging administrator Wendi Barker describes as its "hometown, family feel."

Yet its offices were crowded with stacks of boxes. Filing cabinets were running out of room.

The accounting department at the credit union's headquarters "physically could not stuff another piece of paper" into one of the office cabinets, Barker said.

"I thought they were kidding until I walked down the hall and looked at it," she added.

Staffers preferred in-person interactions and members dotting i's and crossing t's at the credit union's 10 branches in Washington and Oregon.

"We probably had DocuSign for two or three years before we got it off the ground," said Meredith Ellis, Red Canoe Credit Union's IT operations manager. "It had very minimal usage. And then COVID hit."

Employees who were concerned about losing human contact received step-by-step tutorials on the OnBase integration for DocuSign. They embraced the new way of doing business, which was a huge relief for Barker and Ellis — and a major space saver for a credit union that has members in all 50 states.

THE SOLUTION

As the credit union has been a Hyland customer for more than 20 years, Red Canoe's employees were familiar with OnBase. Integrating DocuSign with OnBase "was a slam dunk," Ellis said, because it allowed staff to automate workflows and manage processes on one platform.

"Employees didn't have to go into DocuSign, which is a completely different look," Barker said. "They didn't have to provide another sign-on, another password, all of that."

DocuSign's templates, which can be easily configured, made it simple to get started, and have helped Red Canoe create consistency around where information is placed and signed. By utilizing the OnBase Envelopes tool, employees can tell when a document is viewed, signed and virtually printed.

And if there are issues, the credit union doesn't hesitate to reach out to Hyland's support team.

INDUSTRY	SIZE	LOCATION	HYLAND SOLUTIONS
Financial services	$1.1 billion in assets, 61,000 members	Longview, Washington	OnBase, ShareBase

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Wendi Barker
Imaging Administrator
Red Canoe Credit Union

"I never feel like I have a dumb question," Barker said. "They explain things in the manner that I need. I may not be as technical as my buddy next to me, but it gets taken care of right away."

THE DIFFERENCE
Easing the burden
Red Canoe gave members who were struggling an opportunity to skip payments during the pandemic. The credit union's collections department was overwhelmed by the response. Members emailed pictures of documents that they had taken on their phone, and staffers weren't clear on what was being done, and by whom, for each project.

The OnBase integration for DocuSign "was a huge benefit" to that team, and the impact was immediate, Ellis said.

Simplifying the process
Electronically signed documents return to OnBase automatically. The solution notifies employees when the status of a document changes, eliminating any guesswork and speeding up the process for staffers and members.

"I think there's less confusion on where the documents are and who needs to handle them," Barker said.

Competitive advantage
Ellis can't help but think what would have happened if Red Canoe hadn't sped up its use of DocuSign at the start of the pandemic. The IT operations manager said the credit union's loan processing and general business transactions likely would have dropped.

"It keeps you competitive in the market," Ellis said.

Serving members — "literally anywhere"
Now, members can sign documents on their mobile devices. A member who prefers to sign an agreement at one of Red Canoe's branches can do so, and a spouse or partner can utilize DocuSign to keep the process moving.

"You don't have to take time off work or figure out a time to come in together," Barker said. "That's been beneficial, too."

Members, she added, are excited about the additional options.

"They get notifications just like we do, so they love the speed and the ability to do it literally anywhere," Barker said.

The right information, in the right places
Red Canoe has been sending envelopes — collections of documents that can be compiled and shared with other OnBase users in the organization — for two-plus decades. In 2019, the credit union sent 1,300 envelopes. In 2021, with the OnBase integration for DocuSign now a membership staple, the tally increased to 12,000.

Red Canoe's completion rate for the envelopes is about 85%.

"It's been consistently that or better since we started it," Barker said. "It shows that we're getting the right information."

Red Canoe has no plans to change as in-person interactions approach pre-pandemic levels. Members now expect to sign documents electronically. It's part of an enhanced customer experience.

Still, Red Canoe's new normal will have a couple of familiar elements: Hyland and OnBase.

"You're not left alone and floating aimlessly in this big sea of information," Barker said of working with Hyland. "You don't have to be this technical person, and the end users don't have to be technical people, either. It's super user friendly."

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