CORE PROCESS ANALYSIS & PROGRAMMING

LOAN PROCESSING

Review tracking record creation

Are the correct tracking being created for the correct loans?

Is the correct information being gathered?

Are there repetitive tracking record?

Review from flow

Are forms flowing incorrect order, does staff have to exit and re-enter the workflow?

Review work flows (consumer, HELOC, mortgage)

Are screen in proper order?

Does the information gather flow correctly?

Does staff have to exit the flow and then re-enter the flow?

MEMBERSHIP PROCESSING

Review work flow

Are screen in proper order

Does the information gather flow correctly

Does staff have to exit the flow and then re-enter the flow

Review form flow

Are forms flowing in correct order, does staff have to exit and re-enter the work flow

Review tracking record creation

Correct tracking record creation

Are there repetitive tracking records

COLLECTION & BACK OFFICE

Collection work flow

Review the process flow

Review collection queue setup

Review collection form and letters

Back office loan processing

Review process

Review paperwork collected after loan origination

Review tracking record creation/updates

Review report staff is working form

Testimonial

We engaged with OSSNA to help us to streamline some processes for us. We found them to be creative and responsive. They worked closely with our team to design something that would work for us. We appreciated their approach and believe they provided a very cost-effective solution to other Epysis programmers.

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