Member Asset Verification with Accuity



Member Asset Verification with Accuity is an automated software solution that moves member account balance data for Social Security and Medicare on behalf of the federal government. Through the power of automation, this data is moved digitally, without the need for staff involvement.

- **Save staff time & credit union resources**
- **100% automation**
- **Reduced turnaround time**
- **Archived reporting**

Manual processes can take hours of staff time and should be automated whenever possible to allow focus on other key functions. In order to provide required member account balance data for Social Security and Medicare, credit unions receive information from Accuity on behalf of the federal government. Currently, this process requires manual work that can take hours for back office staff to research and complete.

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How It Works

Through the power of automation, this data is moved digitally, without the need for staff involvement. Synergent regularly queries the applicable locations at Accuity to download requests, match data for members, and return data to Accuity the same day.

Once implemented, this solution is truly hands-off. With this fully automated solution, Synergent logs into the Accuity server, accesses the applicable files and queries data, and provides responses back to Accuity automatically. Because this solution is an automated process, manual staff action is not required, saving significant time and resources.

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Key Benefits

100% Automation – Member account verification requested by Accuity is completely automated, requiring no manual process.

Complete File Support – With both Social Security and Medicare reporting covered, data requirements are met with ease.

Save Staff Time and Credit Union Resources – The automation provided by Member Asset Verification with Accuity eliminates the need to shift staff priorities to answer verification requests in a timely manner. Staff can focus on other essential tasks and the risk of human error is eliminated.

Reduced Turnaround Time – Because the data exchange happens automatically, Accuity receives information back more quickly than when this was a manual process.

Years of Reporting – At this time, Member Asset Verification with Accuity will provide two years of information. Over time, this will extend to five years of data.

"Credit unions must provide member account balance data for Social Security and Medicare. Member Asset Verification with Accuity automates this process, saving significant staff time and credit union resources. By being 100% automated, staff can skip the emails and having to take the time to download files for manual research. Especially at a time where staff shortages are common, automating this process reduces stress and allows staff to focus on other essential tasks."

Pat Mileski
Team Lead – Strategic Partnerships & Solution Support

Learn More

For additional information about Member Asset Verification with Accuity for your credit union, please contact your dedicated Client Success Manager.