

INFO-ACCESS

An advanced loan automation solution that integrates document imaging with a sophisticated collateral and loan document tracking system.



About PROFORMANCE.

PROFORMANCE is a leader in the design and implementation of document automation solutions for the financial services industry. Using structured methodology, we develop proven document management strategies that significantly improve lending, deposit and other paper-intensive operations at the enterprise level. We know how to best integrate applications, such as the OnBase document management system with our INFO-ACCESS and INFO-CAPTURE products, to create industry-specific solutions that are both highly functional and adaptable to changing needs. With 20 years of financial services experience, PROFORMANCE delivers industry leading solutions backed by a significant knowledgebase and exceptional technical support.

Processing Loans with Speed and Efficiency.

Financial institutions that automate and accelerate traditionally labor-intensive loan processing functions will have the resources available to serve more customers. To compete and succeed in an increasingly competitive marketplace, advanced technology solutions are necessary. That's why organizations are turning to PROFORMANCE to implement INFO-ACCESS, a feature-rich loan automation solution that provides a complete snapshot of loan documents and exceptions.

Aggregating Scanned Documents and Host Data Into One Interface.

INFO-ACCESS takes the concept of document imaging to a new level by aggregating all scanned loan documents as well as data from the host system into one, seamless interface. By eliminating the need for multiple software interfaces to view, track and manage loan documentation and collateral, users work in a highly functional, automated environment. The result is a significant productivity increase at the user level as well as across the enterprise.

Tracking the Status of All Captured and Archived Documents.

A built-in tickler/tracking system continually monitors the status of all documents and tracks their relationship to each loan, borrower and the assigned collateral. An electronic checklist within the system indicates the status of the documents, including missing, pending, expiring and present. With INFO-ACCESS notifying users when documents are nearing their expiration date or when documents are missing, compliance-related issues become virtually non-existent.

Simplifying Collateral Relationship Management.

Tracking collateral, cross-collateralization and collateral release manually is cumbersome and wrought with the potential for error. INFO-ACCESS automates collateral tracking by keeping an eye on the relationship between all loans and their associated collateral. In just a few keystrokes, users can access a list of loans by customer and the collateral tied to each, enabling users to verify collateral prior to its release.

Expediting Transactions with a Customer-Centric Solution.

With service expectations on the rise, automating processes helps financial institutions meet the demand. INFO-ACCESS helps expedite transactions by pooling information into a single repository, providing users with a customer-centric view that shows all loan, collateral and customer-related documents.

Loan Automation

with integrated document imaging

- Collateral & document tracking
- Electronic checklist for tickler & exception handling
- Notice generation
- Configurable online work queues
- Interface to loan document preparation products (i.e. Laser Pro, Bankers Systems)
- Direct access to documents from host



PROFORMANCE
The Information Access Company

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Automating Loan Document Tracking with INFO-ACCESS.

INFO-ACCESS

File Search Administration Loans Help

Account **Contact** | Work Items | Reports

Contact Information

Customer N Armstrong Sporting Goods, Inc. Home Phone Tax ID 128-47-2842

Address 1 12029 Stadium Drive Business Phn (713)-555-2100

Address 2 Home E-mail

City Houston State TX Zip 77014 Work E-mail joe.armstrong@asgi.

Loans Collateral

Object Tracked Items Imaged Documents Notes/Issues Configure

Loan #	Loan Officer	Remaining Payments	Per Diem	Loan Term	Term Code	Date Entered	Yesterday Balance	Rate Review	Next Payment	Maturity Date
2000050	PAB	54	\$89.93	60	M	9/23/2004	\$518,044.00		4/15/2005	9/15/2009
445618	PAB	60	\$12.17	60	M	3/16/2005	\$62,626.00		4/25/2005	3/25/2010
425143	RAJ									

INFO-ACCESS simplifies loan document tracking by providing an on-line foldering system for all required documents and data. Users quickly access information for a customer by clicking on the Contact tab. The system automatically generates a list of all loans within the customer's loan portfolio, enabling loan officers to quickly assess additional loan opportunities.

INFO-ACCESS

File Search Administration Loans Help

Account **Contact** | Work Items | Reports

Contact Information

Customer N Armstrong Sporting Goods, Inc. Home Phone Tax ID 128-47-2842

Address 1 12029 Stadium Drive Business Phn (713)-555-2100

Address 2 Home E-mail

City Houston State TX Zip 77014 Work E-mail joe.armstrong@asgi.

Loans Collateral

445618 Tracked Items Imaged Documents Notes/Issues Configure

All (19) Missing (2) Expired (2) Pending (1) Waived (2) Current (12) Released (0)

Drag a column header here to group by that column

Tracked Item Type Name	Responsibility	Waiver Expire Date	Document Expire Date	Details
Attestation of Appl Joint Credit				
Automatic Transfer Authorization				
Boarding Sheet - Memo				
Business Plan				
Checklist				
Disbursement Request				
Note / Addendum				
Notice of Final Agreement				
Financial Statement				
Tax Return				
Guaranty (Blanket)				
Insurance Policy				
Security Agreement (Blanket)				
UCC -1 Recorded				
UCC -3 Recorded				
UCC Search				
Financial Statement				
Credit Report				

Within the Contact screen, users can click on the Tracked Items tab to reveal a color-coded view of all requirements by document type. These colored symbols represent the status of the tracked items, including Missing, Expired, Pending, Waived, Current and Released. This sortable grid enables users to work items by category (i.e. missing, expired, etc.), facilitating notice generation while mitigating risk.