



Total Management of Insurance Information with SWBC SureTrack

Integrated to the Collection and Recovery Modules

The SWBC SureTrack connector enables institutions to access policy details, create and track claims, and transmit the loan data file for SWBC's Collateral Protection Insurance (CPI) directly within Temenos Infinity.

KEY FEATURES

Easy Access to Current Insurance Status

Access current insurance information directly from the Collection and Recovery modules. The connector provides a quick snapshot of the insurance status, agent, company, and all other pertinent details at the touch of a button.

Real-Time Insurance Tracking Information

Data is presented in real-time, allowing your collection team to make more informed risk management decisions. Insurance tracking history includes scanned documents, web updates, and notification letters.

Quickly Review & Track CPI Policy Status

Never lose track of a claim again! You can quickly review the effective dates, payment history, and status of a CPI Policy.

Easily Create New Claims

While working an account, create new claims by using the Claims Request option. Minimal paperwork is required and is pre-filled from the Temenos database, simplifying the claim process for you. Conveniently browse your network and attach any supporting claim documentation, further streamlining the submission process.

Loan Detail	Auto-Fill Manual Certificate	Claims	Loan Maint.
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CLAIMS SEARCH Results for:

Loan Results

loan date	status	nsur Bal	policy
01/16/2014	I	15827.87	

[Submit New Claim](#)

Pending Claims

date submitted	status	policy	Authorized by
No claims pending!			

After submitting a Claim:
 You may upload Additional Claim Documents by Updating a claim listed in this Pending Claims Section.
 Or you may fax us the documents with the Print Summary page as the cover sheet.
 Our Claims fax number is: 503-626-2627.

Submitted Claims

view	date received	claim number	status	policy	carrier
No submitted claims found!					

Seamless Transfer of Loan File Data

The SureTrack connector enables the secure download of your loan file on a daily basis for both auto and mortgage portfolios. Daily updates such as address changes, paid off loans, refinances, bankruptcy, and other collection flags are captured faster, resulting in more accurate borrower communication. You control the transmission frequency and schedule and you can change or add collateral codes without IT involvement. Utilize one secure communication channel to facilitate both collection and collateral insurance tracking requirements and, at the same time, eliminate the need for an external loan file with updates to SWBC.

Other Key Features Included

Additional functionality includes the ability to quote premiums and refunds for collateral protection policies and the ability to submit updated insurance status via the Collection and Recovery modules.

Borrower :	Insurable Balance :	\$15,827.87
Loan Date :	Date Added :	02/03/2014
Rate/Source :	Maturity Date :	N/A
Address :	Phone No. :	

INSURANCE STATUS : (I) Insured by borrower's carrier **NOTICE STATUS :** No notice or polic. y

COLLATERAL

CodeY	earD	escription	Serial
10601	3J	EEP COMPASS-4	

CREDITOR PLACED INSURAN CE

Batch Date	DocNoU	serT	ypeE	ffDate	Desc	Certificat eE	xpCancel	Source
06/03/2014	0141	60	1	05/24/2014	AMFAMILY/13	23281948019 6	CONT.	
06/02/2014	0017	81	1	05/23/2014	AMFAMILY/13	23281948019 6	CONT.	
05/28/2014	0042	70	1	04/25/2014	AMFAMILY/13	23281948019 6	CONT.	
05/19/2014	NDI	1			First Notice			
06/24/2014	EDIAUTO	C			FARMERS INSURANCE GR	7319005956 7	04/25/2014	
03/18/2014	EDIAUTO	C		05/12/2014	FARMERS INSURANCE GR	7319005956 7	CONT.	
02/20/2014	EDIAUTO	1		02/20/2014	FARMERS INSURANCE GR	7319005956 7	CONT.	
01/31/2014	0046	80	1	01/30/2014	FARMERS/13	19005956 7	CONT.	

FLOOD INSURAN CE

No flood insurance. to report.

MEMOS

Date	Memo
05/21/14	1026 AM 80 : PER FARMERS ONLINE POLICY N OT ACTIVE.
01/30/14	0886: FARMERS, JULIE

CLAIMS

No claims to repor t.

BENEFITS

Institutions benefit from the convenience of being able to access insurance information directly through the system using the SureTrack connector.

Eliminate the Need for Multiple Programs

Eliminate time spent maneuvering between multiple screens and programs. All the necessary tools to create, update, and submit insurance requests can be found in the Collection and Recovery modules.

Support at Your Fingertips

Support requests can be sent directly to the Temenos Support Specialist team through the SureTrack connector.

MORE INFORMATION

System Requirements

Version 15 or higher must be installed in order to use the SWBC SureTrack connector.

Provider Highlight



SWBC is a diversified financial services company providing a wide range of insurance, mortgage, and investment services to financial institutions, businesses, and families. To learn more about SWBC, visit their website at www.swbc.com.

For more information about the SWBC SureTrack connector, contact your Temenos Account Manager or email AutoPilot@swbc.com to reach SWBC directly.