



## Total Management of Insurance Information with SWBC

Integrated to the Collection and Recovery Modules

The SWBC Insurance 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 from Temenos Infinity.

### KEY FEATURES

#### Easy Access to Current Insurance Status

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

#### Easy Access to Insurance Tracking Information

Real-time data is presented, allowing your collection team to make more informed risk management decisions. Insurance tracking history includes customer service notes, scanned documents, web updates, notification letters and converted .wav files of all recorded inbound/outbound phone calls.

#### Conveniently Track Claim Status

Never lose track of a claim again! The system provides a virtual claim file for research and quality control. View appraisals, digital images of the damaged collateral, ACV, and damage estimates for an up-to-the-minute review of your claim directly within Temenos Infinity.

#### Seamless Transfer of Loan File Data

The SWBC Insurance 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.

#### Create New Claims with the Touch of a Button

While working an account, create new claims by using the Claims Request option. The wizard-like screen will walk you through the entire process of creating a new claim. Minimal paperwork is required and is pre-filled from the Temenos database, simplifying the claim process. Conveniently browse your network and attach any supporting claim documentation to further streamline the submission process.

#### Quickly Review CPI Policy Status

On the CPI Policies tab, you can quickly review the effective dates, payment history, and status of a CPI Policy.

## OTHER KEY FEATURES INCLUDE

Additional functionality includes the ability to quote premiums and refunds for collateral protection policies, the ability to submit updated insurance status via the system, and a convenient, secure email communication feature to SWBC's FI Support Team; an elite team of Client Care Representatives formed to specifically support you and your team.



The screenshot shows the SWBC Insurance system interface. At the top, there are tabs for 'Insurance Status', 'History', 'CPI Policies (1)', 'Claims (1)', and 'Claim Submission'. Below these is a 'Policy History' section for policy AEJ0126559, which is inactive and has an effective date of 04/26/2008 and an expiration date of 04/26/2009. A table below shows the policy history:

Transaction	Action Date	Eff Date	Premium	Fee	Tax	Memo
Issue	09/11/2008		\$2,841.00	\$50.00	\$0.00	Eff: 4/26/2008 - 4/26/2009
Payment	09/15/2008		\$2,841.00	\$50.00	\$0.00	
Refund	01/20/2009	12/13/2008	\$597.00	\$0.00	\$0.00	Check Number: 017104

## BENEFITS

Institutions benefit from the convenience of being able to access insurance information directly through the platform using the SWBC Insurance connector.

### Reduce Data Entry Requirements

When creating a new claim, fields are mapped to pre-fill with data from the application, reducing the amount of data entry required.

### 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 system.

### Connect the Dots to Asset Recovery Disposal

Leverage the power of the software to complete your collection efforts by integrating the SWBC Insurance screen to connect the insurance process with the asset recovery and disposal function.

### Additional CPI-Related Fields and Data Integration

Pertinent CPI data is uploaded and housed within the system for easy creation of workflows and reports.

### Support at Your Fingertips

Support requests can be sent directly to the Temenos Customer Care team through the SWBC Insurance connector.

### System Requirements

Version 9.02 or higher must be installed in order to utilize the SWBC Insurance connector. Some new features may also require that the latest version to be installed.

### 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](http://www.swbc.com).

For more information about the SWBC Insurance connector, contact your Temenos Account Manager or email [AutoPilot@swbc.com](mailto:AutoPilot@swbc.com) to reach SWBC directly.