

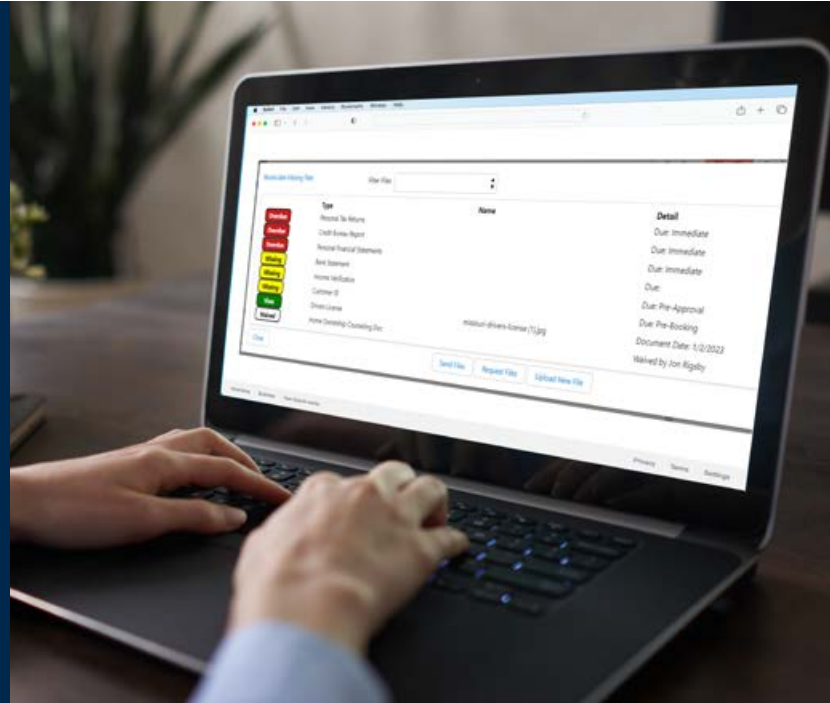
# Hawthorn River Exception Tracking



Automate Exception Generation | Manage Ticklers | Eliminate Redundant Entry

## Manage Exceptions and Ticklers in One Platform

It takes time to track missing and expired lending documents, and many institutions still rely on separate spreadsheets to track exceptions. The result is a cumbersome process that can lead to mistakes and noncompliance with your lending policies. For institutions that already use CenterDoc, Hawthorn River Exception Tracking removes the headache by automatically tracking exceptions and ticklers across all accounts, customers and collateral on an easy-to-use, cloud-based platform.



## Enable Timely Follow-Up and Pinpoint Exceptions

This solution automatically detects exceptions and provides timely reminders throughout the life of the customer relationship. It enables you to:



**Automate Exception Generation:** When a loan closes, Hawthorn River Exception Tracking automatically reconciles the loan file and generates a list of missing document exceptions. Once the missing documents are loaded, the system adds them to CenterDoc and, where appropriate, creates ticklers for recurring document follow-up.

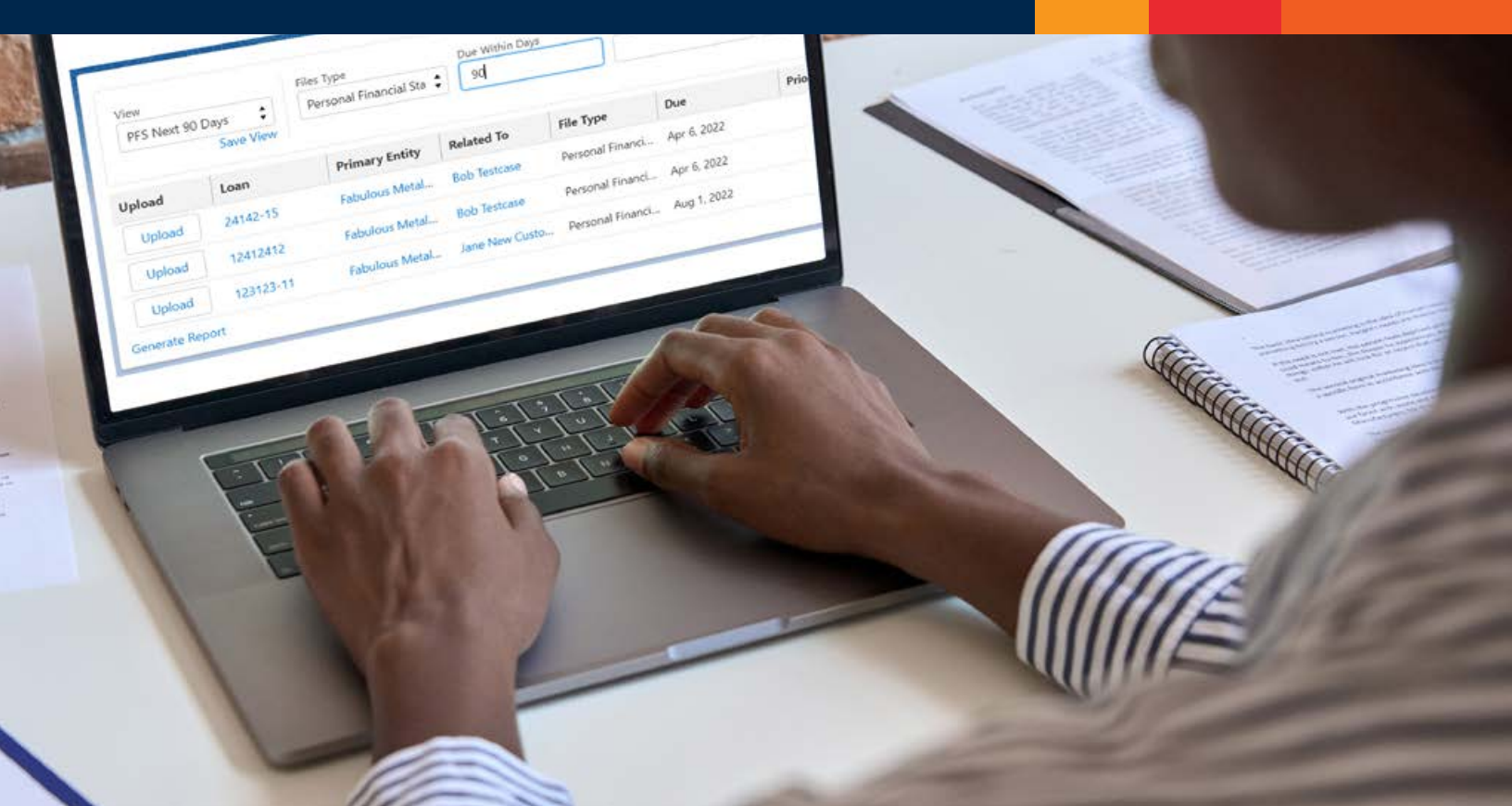


**Consolidate Ticklers in One Place:** The solution tracks exceptions and ticklers across all loans, deposits, customers and collateral on a single, easy-to-use, platform that is 100% cloud-based.



**Eliminate Redundant Entry:** Rather than maintaining separate lists of ticklers when documents are uploaded, Hawthorn River Exception Tracking automatically loads new images to CenterDoc and simultaneously updates the exception or tickler details. This one-step process saves time and eliminates the risk for data entry errors.





## Features:

Robust Relationship Structure	Real-Time Dynamic Reporting	Secure Customer Portal and File Delivery	Real-Time Integration with CenterDoc
Hawthorn River Exception Tracking allows you to link ticklers and exceptions to a loan, deposit, customer or collateral and then use the underlying relationship structure to determine if a tickler is related to multiple accounts or customers.	The integrated tickler reporting functionality enables data to be filtered as needed. You can view exceptions for a given customer, loan officer, even a list of document-specific ticklers (e.g. insurance) due in the next 90 days.	The exception tracking solution enables you to request files directly from borrowers. Upon request, the borrower will be granted access to a secure portal to upload files for review and approval.	Hawthorn River Exception Tracking is integrated in real time with Center Doc. When documents are scanned and loaded into the system, they can be viewed from both platforms in real time.

**For more information about Hawthorn River Exception Tracking, contact your CSI Relationship Manager today!**