Exception Tracking

The Baker Hill NextGen® Exception Tracking solution supports the portfolio management stage of the relationship cycle by helping you establish a consistent process for managing risk.

Baker Hill NextGen® Exception Tracking automates the administrative and relationship aspects of loan portfolio management.

This solution provides a flexible framework to securely monitor document, financial statement, policy, compliance, and exception management across lines of business.

Integrate Risk Management at Every Level

Baker Hill NextGen® Exception Tracking consolidates portfolio monitoring into a common, centralized database and standardizes tracking and monitoring across lines of business.

With this solution, you can:

- Create unique views and checklist templates to meet departmental needs through configuration and use of institution-defined fields
- Build checklists quickly from a predefined list of tracking items
- Ensure that complete and relevant information is gathered. Best practice templates can be selected by product family and associated line of business to manage unlimited tracking item families
- Import data daily, so the centralized database of information from disparate sources becomes a reliable resource for satisfying critical management reporting needs
- Control access to data based on a user's role and security profile within each line of business

Maximize Portfolio Processing

- Common interface makes it easy to review products, collateral and tracking items
- Streamlined interface allows you to select and manage multiple tracking items at one time
- Eleven predefined interface overlays covering real estate, securities, and intangible assets help to support unlimited collateral types

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Explore how your institution can manage risk with Baker Hill NextGen® Exception Tracking. To learn more, visit:

www.bakerhill.com/exception-tracking

Improve Credit Quality and Compliance

- Checklists segmented by line of business, product type, and collateral type enhance adherence to credit policy
- The system identifies insurance and UCC expirations before they occur and provides an online notification
- Regulatory or institution-initiated policy changes are maintained in one location, simplifying ongoing management and ensuring compliance

Centralize Reporting

- Standard reports identify tracking items that have expired or are about to expire
- Custom report authoring environment allows users to filter and modify reports
- Report access is secured at the user, business unit, and role levels

Promote Proactive Relationship Management

- Exceptions are presented to relationship managers on their home page
- Users can filter exceptions based on specific criteria to prioritize and work all exceptions with a single click
- Account holder correspondence may be automatically generated
- Correspondence manager facilitates mass or individual communications, which can be handled via print mail
- System records date and type of correspondence sent

Integrate with Sales Automation and Origination

- Support multiple lines of business with a single database
- Minimize data redundancy and eliminate unnecessary requests for information from the account holder
- Streamline the account holder management process

Baker Hill is in the business of evolving loan origination by combining expertise in technology with expertise in banking. Built on decades of walking alongside banks and credit unions as they provide vital resources to their communities, Baker Hill NextGen® is a configurable, single platform SaaS solution for commercial, small business, consumer loan origination, and risk management that grows along with you as your business needs change. Baker Hill is lending evolved. For more information, visit **www.bakerhill.com**.