

# Innovative technology meets exceptional service in mortgage solutions

**350+**  
clients

## Clients

include leading banks, mortgage lenders, mortgage servicers and sub-servicers, credit unions, title and closing companies, and AMCs

## Advanced

banking and mortgage technology solutions

## 24x7x365

onshore and offshore support available (both FTE and transaction-based)



# Mortgage Originations



## Loan Setup

Seamless loan boarding, document classification, and data extraction, integrated with all popular LOS using our AI and ML-enabled OCR technology solution, DocVu. AI, with >98% accuracy and comprehensive reporting capabilities.



## Loan Processing

End-to-end support in loan coordination, vendor ordering, document review, and underwriting condition review.



## Underwriting Services

Experienced teams with expertise across government, conventional, agency, jumbo, and non-QM loans, achieving near 100% SLA compliance.



## Pre-fund QC

Expertise in pre-fund QC for both full-file reviews and component reviews, with 100% SLA compliance and >99% accuracy.



## Post-Close QC

End-to-end support in post-close underwriter QC and closing package preparation tailored to each investor.



## Pre-Purchase Reviews

Full underwriting and compliance reviews with support for all residential loan types.



## Compliance Services

HMDA automation, fraud review services, and compliance reviews.

## Differentiators

### Highly Experienced Team

Minimum 4-6 years of specialized experience.

### 100% SLA Compliance

High reliability even with varying volumes, thanks to a trained associate pool.

### >99.9% Accuracy

High quality of output.

## DocVu.AI



### AI & ML enabled:

Built on an AI and machine learning-based processing engine to progressively improve accuracy for new document types using our proprietary training studio.



### Document classification/indexing and data extraction

Achieving over 98% accuracy, trained on a repository of 2,000+ lending documents and supported by our exception review teams.



### Comprehensive reporting

Highly customizable report formats for identifying missing documents, with integration into internal systems.



### Easy integration

Multiple integration options and out-of-the-box connectors for LOS, servicing platforms, and DMS.



### Rapid scalability

Ability to handle large bulk volumes even on short notice.



### Intelligent processing

Highly customized business rules enable a wide variety of applications in loan setup and boarding, post-close QC, and income calculation.

## Due Diligence

- Accepted by leading rating agencies as a residential third-party review (TPR) firm.
- Expertise in pre-securitization due diligence reviews and pre-purchase reviews for conventional, non-QM, HELOC, second liens, and jumbo loans.
- Due diligence workflow enabled by our in-house platform, DocVu.AI.
- Specific scopes are also supported in addition to full reviews.

## Differentiators

### Highly Experienced Team

Minimum 4-6 years of specialized experience.

### Unbiased Third-Party Reviews

We ensure completely unbiased reviews undertaken in compliance with investor guidelines.

## DMSVu



### Cloud-Based Document Repository:

Hosted on cloud storage by leading providers.



### Customized Support for Mortgage Workflows:

Highly customized workflows tailored to the needs of mortgage business processes.



### Versatile Document Ingestion:

Seamlessly handle large document volumes through APIs, SFTPs, and other popular methods.



### Effortless Document Organization:

Use cabinets and orders for easy document segregation and advanced search capabilities.



**High Volume Data Support:** Manage up to 4 terabytes of daily data intake for seamless scalability.



**Scalable Data Hosting:** Over 700 million documents supported, with 400 terabytes of growing storage capacity.



### Cost-Effective Storage Solutions:

Optimize storage by categorizing documents for frequent and infrequent access.



**Advanced OCR Capabilities:** Integrated OCR workflows ensure accurate indexing and data extraction from mortgage document types.



**Customizable Business Rules:** Tailor document management processes with flexible SLAs, retention policies, and role-based access.



**Flexible Document Retrieval:** Easily access documents via APIs, Single Sign-On, or batch exports.



**Automated Event Tracking:** Keep track of document uploads with automated management and API-driven exports.



**Robust Data Reliability:** Ensure business continuity with disaster recovery capabilities for uninterrupted performance.

## Mortgage Servicing



**MSR and Loan Boarding:** Using the OCR solution, DocVu.AI, during MSR transfers with >98% accuracy for document indexing/classification and data extraction.



**Default Servicing:** Expert services for managing loss mitigation options, contact center support, and business process support.



**Lien Release and Recording:** End-to-end preparation and e-recording suite for assignment generation, satisfaction of mortgage creation, and collateral management, supported by Visionet's expert teams.



**Servicing Claim Tracking:** Seamless tracking of all servicing claims using our fully automated solution, VisiClaims.



**Servicing Document Management:** Using our cloud-based platform, DMS Vu, with advanced features dedicated to mortgage servicing workflows.



**Escrow Analysis:** Supported by our in-house platform, VisiEscrow, with MSP integration.

## Appraisal Support

- Dedicated teams for processes, specifically field appraisal management, appraisal QC and review, compliance audit, broker price opinion review, valuation reconciliation, desktop appraisals, and AVM creation.
- Extensive in-house automation capabilities.
- Well-trained associates experienced with all residential appraisal types.



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Processing Center  
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