TRAILING DOC FOLLOW-UP

HOW TO CURE OUTSTANDING DOCS

Panelist:

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Moderator:

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Session Topic:
Trailing Doc Follow-up—How to Cure Outstanding Docs

A.
Certification Challenges and Timing Workflow Efficiencies Leading to Back Office Cost Reduction

- When to begin recovery?
- What to do in the interim?
- Implementing efficient workflow tools
- When to STOP recovery
- Workflow Recovery after "closed doors
- " Cost Containment – who pays the bill?

B.
Time to Step Back and Re-Evaluate

How much is too much?

- Number of existing projects within department
- Deficiencies per project
- Current Staff
- Outsource
- Short Term and Long Term Deadlines for Delivery of Final Documents

Resolution to Document Collections

The Key is Sufficient Documentation

- Base File
- Review Closing Instructions
  - ✓ Track County Turn Times
  - ✓ Title Policies
  - ✓ Assignments
  - ✓ MERS
  - ✓ Purchase & Sales Agreement
- Document Tracking System

Alternate Documents & Options

C.
Document Resolutions

- Clearing Old Document Issues
- Meeting Client Request Turnaround Demands
- Managing Severe Volume Spikes
- Cost/Expense Reduction
- Workflow Efficiencies
- Best Practices for Trailing Doc Follow-Up