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## ***Shea Mortgage Saves 20 Minutes Per Loan File with DocuTech***

**Who:** Kathy Thomas, senior vice president of Operations  
Shea Mortgage, Aliso Viejo, Calif.

**When:** DocuTech customer since April 2006

**What:** Shea Mortgage selected DocuTech's ConformX®, a Web-based compliant document and compliance services system, because they needed a secure system that worked with their LOS. ConformX immediately shortened the loan process for Shea Mortgage, reducing closing time by 20 to 30 minutes per file.

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### **The Challenge**

Shea Mortgage (Aliso Viejo, Calif.) is a lender that primarily serves borrowers purchasing homes built by Shea Homes in seven states. When the company decided to outsource document services, they needed a system that would integrate smoothly with their current loan origination system (LOS), Del Mar DataTrac®, and provide security checks for compliance. At the recommendation of Del Mar, Shea Mortgage investigated DocuTech and its compliant mortgage services.

After researching several vendors, Shea Mortgage invited three companies to demonstrate the product in their offices. They selected DocuTech's ConformX™ based on the software's features and integration with DataTrac. Shea Mortgage rolled out the document service to its staff in April 2006.

*"The primary reason we chose DocuTech was the ability to reduce inconsistencies between DataTrac and our closing document system," said Kathy Thomas, senior vice president of Operations for Shea Mortgage. "The embedded security feature in ConformX ensures that the two systems match perfectly at all times while minimizing data entry."*

### **The Solution**

DocuTech's ConformX is an online document and compliance system that guarantees all loan document packages are compliant with all federal, state and investor requirements. ConformX also manages initial disclosures, supports eSigned loans in both Level 1 SMART Docs and eSigned PDF formats. The DocuTech Fulfillment Center gives customers peace of mind that their initial disclosures are delivered to borrowers in compliance with RESPA and Regulation Z guidelines.

During the implementation process, Shea Mortgage required customization of the product for their workflow, and DocuTech eagerly made sure every request and need was completed accurately.

*“What impressed me most about the system was ConformX’s ease of use and the ability to make customizations,” said Thomas. “The system is easy to use and it pulls data directly from DataTrac without a complicated interface. The integration between ConformX and DataTrac is very impressive”*

### **The Results**

In the two years Shea Mortgage has been using ConformX, they report a significant improvement in their closers’ productivity and a reduction in error rates. Thomas specifically pointed to the time saved by staff no longer having to re-key information into ConformX that has already been entered. On average, Thomas said her staff reports saving an average of 20 to 30 minutes per file over their former document system. Thomas also said that they have been able to increase productivity by 40 percent since implementing ConformX.

*“We could not have accomplished our year-end closing numbers in the past two years with our previous system without increasing closing staff,” said Thomas. “We are looking forward to more product offerings such as eDisclosures and eDocuments so we can continue to move our organization forward.”*

Thomas also said that DocuTech supports the generation and mailing of initial disclosures. The fulfillment service used for initial disclosures has been a very beneficial addition to the system, helping staff save additional time on the front end of the loan process by physically mailing and tracking disclosures.

### **About Shea Mortgage**

Aliso Viejo, Calif.-based Shea Mortgage is a full-service mortgage company dedicated to providing mortgages to buyers of homes built by Shea Homes. Shea Mortgage specializes in the financing of new homes, and offers its borrowers a variety of special features designed to help the homebuyer.

For more information, please visit [www.sheamortgage.com](http://www.sheamortgage.com).

### **About DocuTech**

Since 1991, DocuTech Corp. (DocuTech) has provided outstanding compliance services and documentation technology for the mortgage industry. DocuTech's software interfaces with leading loan origination systems (LOS) and enables mortgage professionals to generate documents locally. DocuTech manages and secures all information needed for a loan, guaranteeing accuracy, security and compliance.

For more information visit the company's Web site at [www.docutechcorp.com](http://www.docutechcorp.com).