


## Session 20 Questions and Answers

# VIRTUAL USER FORUM

June 9-10, 2020 | 

Recordings can be viewed at <https://www.meridianlink.com/events/user-forum-2020>

### Session 20 - XpressAccounts Fast Track: How You Can Digitally Open Deposit Accounts before You Migrate

COVID-19 has taught us that all FIs must have a digital strategy that includes lending and account opening. If you cannot accept deposit accounts digitally, here is a solution to resolve that issue for legacy LOS users. XpressAccounts FastTrack is designed to get you LIVE and automatically accepting, processing and decisioning deposit account applications in mere weeks as MeridianLink does all the configuration required for both XpressAccounts and Application Portal for you.

<b>Q. In the presentation, how did they sign the documents? We are using DocuSign. Do you recommend doing it differently?</b>	A. In-session signing is the ideal solution for e-signatures, but using DocuSign to send the packets is a great solution as well.
<b>Q. What Cores do you have API integration with?</b>	A. We have integration with over 30 Core systems. Please contact your MeridianLink sales representative or Partner Success Manager (PSM) for more information.
<b>Q. What is the difference between Application Portal (AP) Fast Track and XpressAccounts (XA) Fast Track?</b>	A. AP Fast Track configures AP for you. XA Fast Track configures both AP for deposits and the in-branch XA platform.
<b>Q. Can AP Fast Track include setting up XA for deposits or not?</b>	A. AP Fast Track would not include setting up XA for deposits. XA Fast Track can set up XA deposits for you.
<b>Q. How would account funding work for XA Fast Track?</b>	A. XA Fast Track will include NACHA ACH and mail-in check as funding options.
<b>Q. If the prospective member chooses email disclosure, will the disclosure be text formatted or a PDF with our branding?</b>	A. The best practice would be a PDF branded document.

<b>Q. Is there any Verafin integration for CIP reporting?</b>	A. Not at this time. We are analyzing Verafin for potential future inclusion.
<b>Q. Do you have a LexisNexis interface?</b>	A. We do have an integration for LexisNexis called RiskView. It is an alternative credit score. We do not have LexisNexis InstantID integration for IDA/IDV/fraud at this time.
<b>Q. We are a MeridianLink client and use XA. Do we already have access to all of these solutions?</b>	A. You can sign up for AP Fast Track if you do not have AP yet, but do have XA.
<b>Q. Are you reviewing Verafin for potential future inclusion?</b>	A. Not at this time. We are analyzing Verafin for potential future inclusion.
<b>Q. Is reporting available for abandonment or cross-sell purposes?</b>	A. Yes, this is available through reporting in XA.
<b>Q. Where would we upload the CSV file of the ineligible applicants that caused a loss?</b>	A. Go to Tools > Manage > High Risk Consumers

