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Obligation Insights

MONITOR → FLAG → RECOMMEND

Receive & analyze historical financial data

The AI agent connects with internal financial data systems (e.g., sub-ledgers, monthly drawdowns) and utilizes historical financial data to identify spending patterns, forecast, and assess risk of UDOs/ULOs.

Portfolio monitoring

The AI agent generates detailed portfolio views for CORs/POs to identify trends and drill down into specific awards.

Risk identification

The AI agent flags risky spending patterns, helping CORs/Pos easily identify awards with potential spending risks.

Recommend changes

The AI agent generates short summaries of issues and recommendations for consolidating portfolio or pulling back funding.

CORs & POs review recommendations

CORs and POs review, edit, and approve the summaries and recommendations.

Assist fund liquidation

The AI agent liquidates funds within an obligations system based on approved recommendations.

PORTFOLIO MONITORING CAPABILITIES

Portfolio Analysis

Provides a detailed overview of fund allocations, identifying unliquidated obligations within programs.

Pattern Analysis

Analyzes geographic and grantee spending trends, identifying areas and behavior with higher risk of fund lapses.

UDO Forecasting

Uses machine learning to predict which obligations may remain unliquidated, enabling timely action.

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