



# ADR Attorney Integration Guide

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Version 1.30

2023.01.13

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Operations

Data Definition Legend

Foreclosure – New Referral

Foreclosure Update

POC – New Referral

POC Update

MFR – New Referral

MFR – Update

Message

Document

ImportForm

Embedded Object Structures

Total Debt Ledger

Pre Post Petition Ledger

Decision Delay

Import Form

Messages

Documents

Appendix A: Workflow Steps

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**Revision History**

Date	Version	Description
2013-05-20	1.0	Initial Release
2013-05-20	1.1	Fixed Typo in checklist in Security Model. Adjusted ImportResult data definition table.
2013-05-21	1.2	Adjusted definitions, Security Model and FAQ.
2013-05-24	1.3	Updated URLs and Appendix A. Added ADR Certification Checklist.
2013-05-28	1.4	Updated Bankruptcy templates in Appendix A.
2013-05-31	1.5	Updated field requirements.

2013-07-25	1.6	Updated workflow steps for: Alabama and Michigan. Added workflow for Texas Home Equity, Nebraska (Non Judicial). See Appendix A. Court names updated. See Appendix D. Added Appendix H for Required Documents. Removed DateClosed and ClosedReason from Foreclosure, MFR and POC referral schemas. DateClosed and ClosedReason can be passed in the Update method. Added Appendix I for Import Dashboard.
2013-12-06	1.7	Removed step 'Notice of Default' for Alabama Non-Judicial. Added 'Litigation Detail' as type of delay. Added Opening Bid Amount as required value for 'Foreclosure Sale Held' step.
2014-01-27	1.8	<p>Added Judicial Wofkflows for Alaska, Alabama, Arkansas, Arizona, Minnesota, Missouri, Montana and Nevada. Added Non Judicial workflow for Hawaii.</p> <p>Foreclosure Sale Held task – UPB is required when completing the task and value must be greater than \$0. If the property is identified as being sold to a 3rd party or undisclosed, the Sale Amount must be greater than \$100.</p> <p>Made Bar Date non mandatory while creating new MFR or POC referrals.</p>
2014-02-24	1.9	Add Michigan Judicial workflow. Added max length for text fields.
2014-03-19	1.10	Removed “Redemption Period Expires” step from PA process. Additional data requirements for the “Foreclosure Sale Held” step.
2014-04-23	1.11	<p>Made Court Case number mandatory while completing “Complaint Filed” step.</p> <p>Change in sequence for Rhode Island template.</p>
2014-05-08	1.12	Changed step name for Rhode Island workflow.
2014-06-26	1.13	Added NY Co-op workflow
2014-07-15	1.14	Changed steps for CO Non-Judicial workflow

2014-08-15	1.15	Updated Attachment Template setting to “Many Per Parent” for “FC Document” and “Affidavit of Service”.
2014-09-18	1.16	Updated list of Workflows. Added list of Attachment Templates.
2015-02-23	1.17	Updated list of Workflows. Templates for CO Non Judicial, CT Judicial, LA Judicial (Executory), MN Non Judicial, NJ Judicial, NV Non Judicial, NY Co-op, PR Judicial, RI Non Judicial, WA Judicial, and WV Non Judicial have been added/updated. See Appendix A for details.  Updated ImportForm Data Definition and Sample XML.
2015-06-02	1.18	Added OR Non-Judicial workflow  Added CA Judicial workflow  Updated NY Co-Op workflow  Updated MI Non-Judicial workflow
2017-02-10	1.19	Updated DecisionDelayTemplate list  Added ImportForm Message requirement  Added Bankruptcy Case Closure requirements  Removed Workflow Steps Table and added reference to Attorney User Guide; to be maintained there  Removed DCS Milestone Appendix (B)  Added Foreclosure and Bankruptcy Closed Reason Enumerations
2017-08-17	1.20	Added Foreclosure and Bankruptcy Case Closure ImportForm data elements
2017-09-17	1.21	Synced Foreclosure and ForeclosureUpdate operations; general cleanup

2018-08-15	1.22	Added new elements required for ordering Title
2018-11-16	1.23	Added ProcessType in Foreclosure Operation sample XML
2019-10-18	1.24	Added Autobind documentation; updated all Operations and their schemas to account for conditional requirements based on Autobind addition
2020-01-14	1.25	Removed Autobind from standalone Operations; not currently supported
2020-02-22	1.26	Added Total Debt Ledger Posted Date to ImportForm operation
2022-06-21	1.27	Added single line item to Troubleshooting section
2022-06-29	1.28	Added “HAF” to list of Hold Templates in Appendix B; general clean-up for that table
2022-09-06	1.29	Added Converted Date, Discharged Date and Dismissed Date elements
2023-01-13	1.30	Removed all references to the “Restart” Operation. Restart feature is no longer available
2025-01-28	1.31	Added errors related to Bid information to Troubleshooting Errors section in Appendix E; Changed required fields to conditional where appropriate

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# OVERVIEW

## [ ] OBJECTIVE

This document is a technical guide integrating attorney system with Freddie ADR system. It describes transmission protocols utilized, xml messaging and schema requirements. It will also outline general usage and common error

types.

It is written for both prospective and new system integrators, consultants and other technical professionals interested in integrating with ADR.

# [ ] DEFINITIONS

The following terms are referred to in this document.

Term	Definition
ADR	Attorney Data Reporting System
Endpoint	Web service or HTTP receiver that is exposed by an organization to receive inbound data
QBO	Acronym for Quandis Business Objects. Generally refers to any module or component that has been created by Quandis.
ImportForm	QBO term used to represent a tracking step in ADR. Formerly known as Milestone in DCS. Synonymous with task or step in other systems.
REST	Acronym for Representational State Transfer
HTTPS	Acronym for Hypertext Transfer Protocol Secure. See <a href="http://en.wikipedia.org/wiki/HTTP_Secure">http://en.wikipedia.org/wiki/HTTP_Secure</a> [ <a href="http://en.wikipedia.org/wiki/HTTP_Secure">http://en.wikipedia.org/wiki/HTTP_Secure</a> ]
BASIC Authentication	HTTP authentication method. See <a href="http://tools.ietf.org/html/rfc2617">http://tools.ietf.org/html/rfc2617</a> [ <a href="http://tools.ietf.org/html/rfc2617">http://tools.ietf.org/html/rfc2617</a> ] <a href="http://en.wikipedia.org/wiki/Basic_access_authentication">http://en.wikipedia.org/wiki/Basic_access_authentication</a>
Process Object / Process Record	Refers to a process record in ADR. Process records are database records which represent a Foreclosure, MFR and POC.



ImportForm	Object structure used in ADR for step tracking within an ADR process. Formerly known as Milestone in DCS.
DecisionDelay	Object structure used in ADR to track delays within a process.
Message	Object structure used in ADR to store note or memo data.
Ledger	Object structure used to ADR to store accounting information.
ADR Certification	Certification process in which integrators must successfully complete before they are allowed submit data to the ADR production environment.

# [ ] SYSTEM CONNECTIVITY

ADR receives data via the public internet using HTTPS (2048 bit) protocol as the standard protocol. VPN connectivity is supported under special circumstances. ADR supports REST service API.

## [ ] Security Model

ADR uses BASIC Authentication as the primary authentication method. Authentication is obtained by specifying the security credentials provided by Quandis

In order to successfully authenticate with the ADR API, the following HTTP headers must be observed:

HTTP Header	Additional Notes
Authorization	Quandis will procure credentials for each ADR environment. These credentials must be supplied with each call. The credentials are used to construct the BASIC authentication header.
User-Agent OR SOAPAction	Ensure HTTP header “User-Agent” is nonexistent in the call or the HTTP header “SOAPAction” exists with a value. By satisfying either, ADR infers the call is an automated request and issues a Basic Authentication challenge instead of redirecting for forms authentication.

# ADR Environments

ADR exposes the following environments

Environment	Purpose	Hostname
DEV	Development environment used for initial connectivity and integration tests	devadr.quandis.net
UAT	QA environment used for system integration testing	<del>integrationadr.quandis.net</del> (to be deprecated as of 08/22/2018) uatadr.quandis.net
PROD	Production environment	<del>integration.freddiemacadr.com</del> (to be deprecated as of 10/04/2018) www.freddiemacadr.com

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## Submission URLs

ADR exposes separate URLs for each resource. The URLs follow the pattern:

http://{baseUrn}/Import/Import.ashx/{OperationName}

- baseUrn is the ADR environment name
- OperationName is the import operation.

The following are examples of URLs to distinct ADR resources:

URL	Description
https://devadr.quandis.net/Import/Import.ashx/Foreclosure	Resource used to call Foreclosure operation in ADR development environment
https://uatadr.quandis.net/Import/Import.ashx/ImportForm	Resource used to call ImportForm operation in ADR UAT environment
https://www.freddiemacadr.com/Import/Import.ashx/MFR	Resource used to call MFR operation in ADR production environment

Unless otherwise specified all ADR operations must be performed as HTTP POST. Please refer to the full list of operations in the Supported Operations section of the integration guide.

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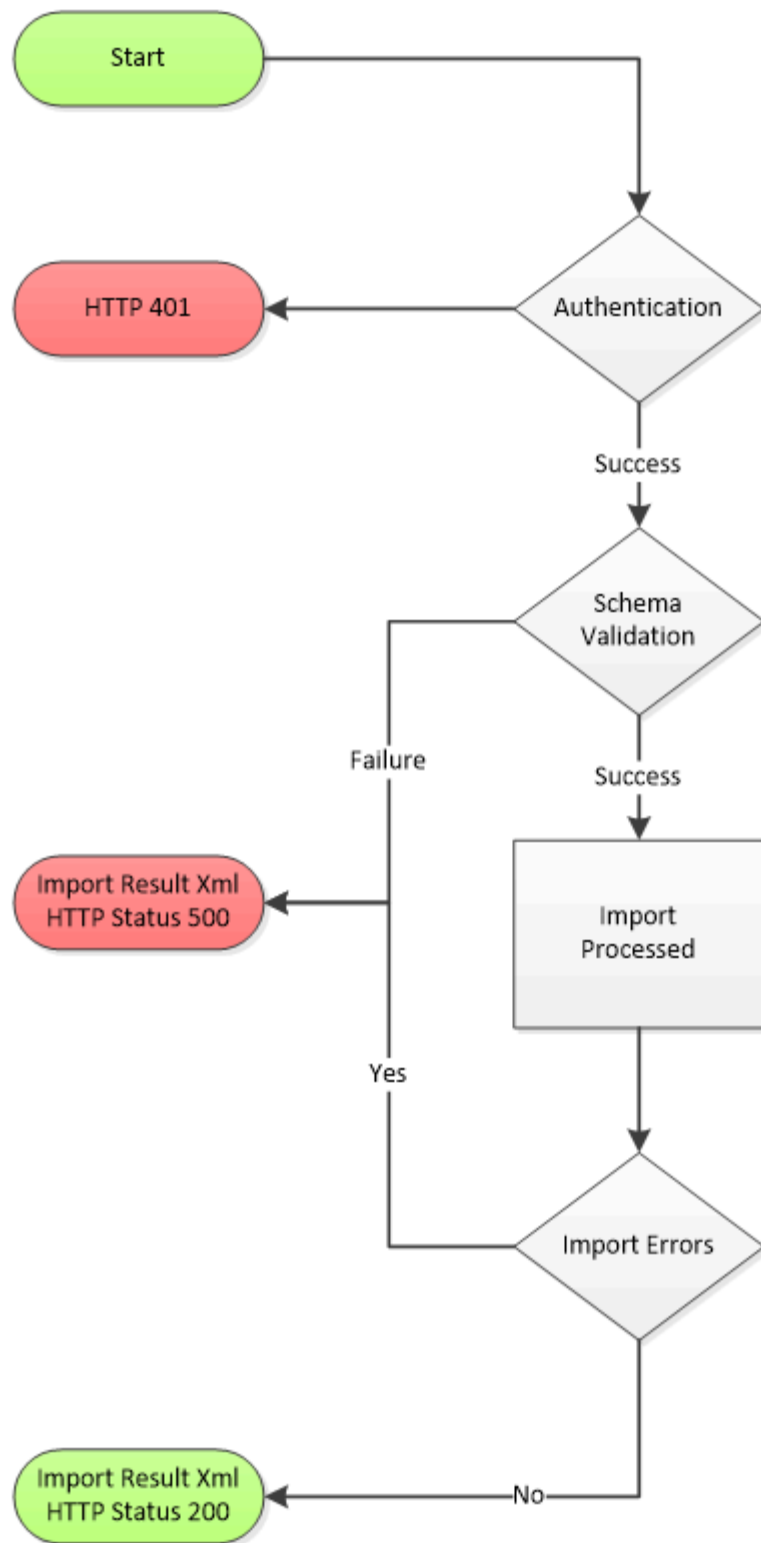
# [ ] DATA SUBMISSION

## [ ] Submission Checklist

To submit data to ADR, the following criteria must be met:

Item	Details
HTTP Headers correctly set	Refer to “Security Model”
URL Resource must be specified	Refer to “Submission URLs”.
HTTP Method	Must be set to “POST”
Xml Content must be in correct format	Refer To “Operations”. The format of the Xml must match the schema format associated with the operation

The following diagram depicts the processing flow of an ADR Import submission.



# [] HTTP Response Status

Upon submission, the ADR resource will return HTTP status. Any status other than 200 indicates a problem with the submission. The following table outlines the possible statuses:

HTTP Status	Description
200	Success. Refer to Import Result XML
401	Login failure. Check credentials and ensure credentials match environment
500	Failure(s) occurred. Refer to Import Result Xml for additional detail

# [] Interpreting Import Result XML

Import Result is the XML output returned by the ADR Import resource. It is important to observe the XML is returned in both successful and non-successful scenarios. The Xml format contains summary information and detail information. Depending on the operation invoked, the detail information can contain one or many items.

The following table outlines the various attributes of an Import Result:

Node		Required	Type	Length	Description / Enumerations
ImportResults		Y	N		Contains summary information for import operation
	ID	Y	I		ImportFileID. Searchable in ADR
	SuccessCount	Y	I		Successful objects inserted or updated.
	WarningCount	Y	I		Warning Count
	ErrorCount	Y	I		Error Count

	Status	Y	E		Complete, Error, Validation Error
	ImportStart	Y	D		Import Start Time
	ImportComplete	Y	D		Import Complete Time
	Reference	N	T		Reference Value provided by client. Searchable in ADR
	Result	N	N		Individual Operation Result
	ID	Y	I		ImportLogID. Searchable in ADR
	Reference	N	O, T		Reference provided by client for individual operation. Searchable in ADR
	Object	Y	T		Object affected by Import
	ObjectID	N	I		ObjectID of Object
	Operation	Y	T		Operation performed on object.
	Status	Y	T		Outcome of operation. Success, Error
	Message	O	T		Only produced when Operation results in Error. Reason for Operation error
	Properties	O	N		Collection of object properties. Will be omitted if Reference attribute is provided at Operation level

# [ ] SUPPORTED OPERATIONS

## [ ] DATA BINDING

Data binding is the ability to locate an existing record on a subsequent submission during automation. Data binding locates the process object using one of the following methods:

- SubscriberID pattern
- Autobind

Process objects are the primary referral types which consist of:

- Foreclosure
- MFR
- POC

There are two scenarios when data binding is utilized:

- Updating an existing process object (eg. Foreclosure, MFR or POC)
- Saving child objects which are related to a process object (eg. Completing an ImportForm or adding a DecisionDelay)

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## [ ] SUBSCRIBERID PATTERNS

When XML data is submitted to ADR, a SubscriberID can be included in each XML message, which enables the message to be uniquely identified. ADR schemas will utilize SubscriberID patterns in two different formats:

- Process SubscriberID – This format is when a process structure is passed and contains a SubscriberID nested in the XML. By nesting a SubscriberID in the process XML, any data contained in the XML is bound to the process
- Object / ObjectSubscriberID – This format is utilized when an object is submitted stand-alone and not nested in a process object. By providing a combination of Object and ObjectSubscriberID the process record can be located and the object can be bound correctly. Note the value contain in ObjectSubscriberID is the same exact value as Process SubscriberID.

The format of SubscriberIDs follows a general pattern. In addition, there are several key aspects of the SubscriberID pattern that must be adhered to at all times. Consider:

- **SubscriberIDs are globally unique**
  - For example, if a Foreclosure is submitted with a SubscriberID value of: www.attorney.com-Foreclosure-181 any updates to this Forclosures must be sent with the same SubscriberID value or they will be



interpreted as a targeting a different Foreclosure record.

- SubscriberIDs follow the pattern <url of source>-<tablename of object in source system>-<identity of object in source organization>
    - URL of source- contains the URL of the source organization. In the case of a ADR data, this is the URL of the attorney website or attorney Case Management System (CMS). Eg. [www.attorney.com](http://www.attorney.com) [<http://www.attorney.com>]
    - Table name of object – generally contains the table name the object was exported from. Eg. In the ADR system, Foreclosures are exported out of the Foreclosure table. Hence, the value would be 'Foreclosure'.
    - Identity of object – This is the primary key identity of the object in the source system. Eg. The Foreclosure row in the vendor system has a primary key value of 181
    - A full example would be [www.attorney.com](http://www.attorney.com) [<http://www.attorney.com>]-Foreclosure-181
- 

## AUTOBIND

When a SubscriberID is not provided, ADR will utilize the Freddie Mac Loan Number and Attorney Case ID to uniquely identify the case. Updates to Processes and their child objects can be performed using this method. If multiple records with the same Attorney Case ID are present, Autobind will bind to the active case first, and if no active case is present, it will bind to the most recent case, based on the DateOpened value.

Two assumptions are made in regards to the Attorney Case ID when using the Autobind method for data binding:

- The Attorney Case ID must be unique across all cases within the firm's Case Management System (CMS)
  - The Attorney Case IDs for each case must match between the attorney's CMS and the ADR system
    - Should the Case ID change in the CMS, the Case's ID in the ADR system will need to be manually updated by a user from the UI. See the [ADR Attorney User Guide](https://www.quandis.com/freddiemacadr_attorneyguide_html) [[https://www.quandis.com/freddiemacadr\\_attorneyguide\\_html](https://www.quandis.com/freddiemacadr_attorneyguide_html)] for instructions on how to perform this function.
- 

## [] DATA BINDING SCENARIOS

### [] Scenario 1 – Updating a Process Record using a SubscriberID

Updating a process record is the ability to submit an update that will locate a given process and update the record.

Common scenarios include:

- Closing a Process (eg. Closing a process, sale information)
- Changing attributes of a Process (eg. Updating debtor contact, borrowers)

In both of these scenarios, the Xml submitted contains a process object structure that contains a SubscriberID which uniquely identifies the process record. An example of a process update is:

```
<ImportCollection>
```

```
<MFRItem>
```

```
<SubscriberID>www.attorney.com-MFR-1000000</SubscriberID>
```

```
<DateClosed>2013-01-01</DateClosed>
```

```
<ClosedReason>Reinstated</ClosedReason>
```

```
</MFRItem>
```

```
</ImportCollection>
```

## **[] Scenario 2 – Updating Child Records During Process Update using a SubscriberID**

Most objects tied to a process can be updated by nesting them in a process update. The following example shows how to update an ImportForm as part of a process update:

```
<ImportCollection>
```

```
<MFRItem>
```

```
<SubscriberID>www.attorney.com-MFR-1000000</SubscriberID>
```

```
<Forms>
```

```
<ImportFormItem>
```

```
<Template>Bankruptcy File Received</Template>
```

```
<ActualCompletion>2013-01-01</ActualCompletion>
```

```
<Messages_0_Message>Task Changed</Messages_0_Message>
```

```
<Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>

</ImportFormItem>

</Forms>

</MFRItem>

</ImportCollection>
```

By nesting the ImportForm in the process update, the ImportForm record is automatically bound the process record.

## [] Scenario 3 – Updating Child Records Using Stand-Alone Format using a SubscriberID

An alternate way to update ImportForms is to submit them stand-alone or outside of the process update. Updating an ImportForm using a non process object format or stand-alone format requires the object to be submitted with a format that contains a reference to the process object using the Object/ObjectSubscriberID format. An example of a stand-alone update is:

```
<ImportCollection>

<ImportFormItem>

<Object>Bankruptcy</Object>

<ObjectSubscriberID>www.attorney.com-MFR-1000000</ObjectSubscriberID>

<Template>Bankruptcy File Received</Template>

<ActualCompletion>2013-01-01</ActualCompletion>

<Messages_0_Message>Task Changed</Messages_0_Message>

<Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>

</ImportFormItem>

</ImportCollection>
```

## Scenario 4 – Updating a Process Record using Autobind

Updating a process record is the ability to submit an update that will locate a given process and update the record.

Common scenarios include:

- Closing a Process (eg. Closing a process, sale information)
- Changing attributes of a Process (eg. Updating debtor contact, borrowers)

In both of these scenarios, the Xml submitted contains a process object structure that contains the Attorney Case ID which uniquely identifies the process record. An example of a process update is:

```
<ImportCollection>
```

```
<MFRItem>
```

```
<MFR>010.X9899.19</MFR>
```

```
<DateClosed>2019-10-01</DateClosed>
```

```
<ClosedReason>Motion Granted</ClosedReason>
```

```
</MFRItem>
```

```
</ImportCollection>
```

## Scenario 5 – Updating Child Records During Process Update using Autobind

Most objects tied to a process can be updated by nesting them in a process update. The following example shows how to update an ImportForm as part of a process update:

```
<ImportCollection>
```

```
<ForeclosureItem>
```

```
<Foreclosure>19-FC12345</Foreclosure>
```

```
<Loan>
```

```
<Agency>Freddie Mac</Agency>
```

```
<Loan>000135114</Loan>
```

```
</Loan>
```

```
<Forms>

<ImportFormItem>

<Template>Foreclosure File Received</Template>

<ActualCompletion>2019-10-01</ActualCompletion>

<Messages_0_Message>Task Changed</Messages_0_Message>

<Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>

</ImportFormItem>

</Forms>

</ForeclosureItem>

</ImportCollection>
```

By nesting the ImportForm in the process update, the ImportForm record is automatically bound the process record.

# [] OPERATIONS

The following is the list of operations supported by ADR Attorney Integration API.

Operation	Description	Stand-Alone	Schema File
Foreclosure	Creates new Foreclosure referral	No	Foreclosure.xsd
ForeclosureUpdate	Updates existing Foreclosure, including updating status, sale information, financial information, delays and forms.	No	Foreclosure.Update.xsd

POC	Creates new POC referral	No	POC.xsd
POCUpdate	Used to update an existing POC, including updating status, sale information, financial information delays and forms.	No	POC.Update.xsd
MFR	Creates new new MFR referral	No	MFR.xsd
MFRUpdate	Can be used to update an existing MFR, including updating status, sale information, financial information, delays and forms.	No	MFR.Update.xsd
Message	Adds message on an existing Foreclosure, POC or MFR referral	Yes	Message.xsd
Document	Adds document on an existing Foreclosure, POC or MFR referral	Yes	Document.xsd
ImportForm	Updates ImportForm (aka Steps/Milestones/Tasks) on an existing Foreclosure, POC or MFR referral	Yes	ImportForm.xsd
Result	Returns import result Xml from an individual submission. This call must be performed as a HTTP GET.	N/A	N/A

## Data Definition Legend

The following table provides a definition on the Required and Type columns for field definition.

Category	Enumeration	Description
Required	Y	YES. Item is required
Required	N	No. Items is not required
Required	O	Optional. Optionally required and pertains to parent nodes
Required	C	Conditional. Required under certain conditions (see Description)
Type	N	Node. Represents parent-most node of embedded object structure
Type	E	Enumerated. See Description or schema for details
Type	A	Xml Attribute
Type	T	Text
Type	D	Date. Acceptable formats are: YYYY-MM-DD YYYY-MM-DDTHH:MM:SS YYYY-MM-DDTHH:MM:SS+HH:MM YYYY-MM-DDTHH:MM:SS-HH:MM YYYY-MM-DDTHH:MM:SSZ
Type	M	Money
Type	I	Integer

## [] Foreclosure – New Referral

This operation can be used to create a new Foreclosure referral.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Data Definition

Node		Required	Type	Length	Description / Enumerations
ImportCollection			N		
	Reference	N	A		Job number of submission
	ForeclosureItem	Y	N		
	Reference	N	A	50	Unique value representing Foreclosure record in attorney CMS
	SubscriberID	N	T	255	Unique Foreclosure identified in following pattern: www.<AttorneyName>.com-Foreclosure-<Loan>
	Loan	Y	N		
	Agency	Y	E		Will always be “Freddie Mac”
	Loan	Y	T	9	Valid FreddieMac Loan Number
	Property_Address	N	T	100	Property Address
	Property_City	N	T	50	Property City
	Property_PostalCode	N	T	10	Property Postal Code; 5-digit or 5+4 digit
	ServicerLoanID	Y	T	100	Servicer’s Loan Number
	LoanType	N	E		Conventional, FHA, VA, USDA
	OriginalBalance	Y	M		Original Loan Amount
	UPBAmount	Y	M		Current Unpaid Principal Balance
	LienPriorityType	N	I		Indicates Lien Position; Enumerations: 1, 2



		PublicRecords	N	N		
		PublicRecordItem	C	N		Required when providing PublicRecords element
		PublicRecord	C	E		Required when providing PublicRecords element Will always be “Mortgage Deed of Trust”
		FilingDate	N	D		Deed of Trust Dated Date
		RecordingDate	N	D		Deed of Trust Recording Date
		Borrowers		N		
		BorrowerItem	Y	N		At least one BorrowerItem required
		LastName	Y	T	50	Combined length of LastName + FirstName cannot exceed 50 Characters
		FirstName	Y	T	50	Combined length of LastName + FirstName cannot exceed 50 Characters
		BorrowerType	Y	E		Primary, Secondary
		USSSN	N	T	11	
		Address	N	T	50	Mailing Street Address for Borrower(s)
		City	N	T	50	Mailing City for Borrower(s)
		State	N	T	2	Mailing State for Borrower(s)
		PostalCode	N	T	10	Mailing Postal Code for Borrower(s)
		Sequence	Y	I		Indicates borrower sequence. Sequence value must be the same on subsequent submissions
		Foreclosure	Y	T	50	Attorney reference number/Case ID
		DateOpened	Y	D		

	Status	Y	E		“Open”, “On Hold”, “Closed”
	ProcessType	O	E		“Judicial”, “Non Judicial”, “Home Equity”, “Co-op”
	<del>DateClosed</del>	N	D		
	SaleAmount	N	M		
	SoldToName	N	E		“Back to Beneficiary”, “Third Party”, “Reverted to Senior”, “Undisclosed”
	ScheduledSaleDate	N	D		
	RedemptionDate	N	D		
	DeficiencyStatus	O	E		“Waived”, “Preserved”
	RedemptionAmount	N	M		
	TotalDebtLedger	N	N		Refer to Total Debt Ledger
	Delays	O	N		Refer To Decision Delay
	Forms	O	N		Refer To Import Forms
	Messages	O	N		Refer To Messages
	Attachments	O	N		Refer To Documents
	OpeningBidAmount	O	M		

**Sample XML**

```
<ImportCollection>

<ForeclosureItem>

<SubscriberID>www.attorney.com-Foreclosure-10000053</SubscriberID>
```

<Loan>

<Agency>Freddie Mac</Agency>

<Loan>408693568</Loan>

<Property\_Address>601 E Hampton St</Property\_Address>

<Property\_City>Riverside</Property\_City>

<Property\_PostalCode>91406</Property\_PostalCode>

<ServicerLoanID>00001255568</ServicerLoanID>

<LoanType>Conventional</LoanType>

<OriginalBalance>155765.33</OriginalBalance>

<UPBAmount>135400.44</UPBAmount>

<LienPriorityType>1</LienPriorityType>

<PublicRecords>

<PublicRecordItem>

<PublicRecord>Mortgage Deed of Trust</PublicRecord>

<FilingDate>2015-07-21</FilingDate>

<RecordingDate>2015-07-25</RecordingDate>

</PublicRecordItem>

</PublicRecords>

<Borrowers>

<BorrowerItem>

<LastName>Doe</LastName>

<FirstName>Jane</FirstName>

<BorrowerType>Primary</BorrowerType>

<USSSN>555124444</USSSN>

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

<Sequence>1</Sequence>

</BorrowerItem>

<BorrowerItem>

<LastName>Doe</LastName>

<FirstName>John</FirstName>

<BorrowerType>Primary</BorrowerType>

<USSSN>555124445</USSSN>

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

<Sequence>2</Sequence>

</BorrowerItem>

</Borrowers>

</Loan>

<Foreclosure>10000053</Foreclosure>

<DateOpened>2013-03-22</DateOpened>

<ProcessType>Non Judicial</ProcessType>

<TotalDebtLedger>

<Template>Total Debt</Template>

<Items>

<AccruedLateCharges>15.00</AccruedLateCharges>

<PendingAdvances>25</PendingAdvances>

<FCFeesCosts>

<Items>

<ForeclosureFee>15</ForeclosureFee>

</Items>

</FCFeesCosts>

</Items>

</TotalDebtLedger>

<Forms>

<ImportFormItem>

<Template>Foreclosure File Received</Template>

<ProjectedCompletion>2013-04-25</ProjectedCompletion>

<ActualCompletion>2013-05-02</ActualCompletion>

<Messages\_0\_Message>Task Changed</Messages\_0\_Message>

<Messages\_0\_BodyText>Task changed because of this reason</Messages\_0\_BodyText>

</ImportFormItem>

</Forms>

<Messages>

<MessageItem>

<Template>Attorney Message</Template>

<Message>This is the subject</Message>

<BodyText>Message Content Goes here</BodyText>

</MessageItem>

</Messages>

<Attachments>

```
<AttachmentItem>

<FileName>Deficiency.pdf</FileName>

<Template>Deficiency Judgment</Template>

<Description>Description goes here</Description>

<Content><![CDATA[Base64]]></Content>

</AttachmentItem>

</Attachments>

</ForeclosureItem>

</ImportCollection>
```

## Foreclosure Update

Foreclosure updates can consist of a variety of data points. The following table indicates the parent node requirements for a Foreclosure update. Please refer to the schema for specific field level requirements.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node		Required	Type	Length	Description / Enumerations
ImportCollection			N		
	ForeclosureItem	Y	N		
	SubscriberID	C	T	255	Unique Foreclosure identified in following pattern: www.<AttorneyName>.com-Foreclosure-<Loan> Must match SubscriberID for existing case Required if Foreclsoure node/value is not supplied
	Loan	N	N		
	Agency	C	E		If Loan Node/Collection is supplied, Agency is required Will always be “Freddie Mac”

	Loan		C	T	9	If Loan Node/Collection is supplied, Loan is required Valid FreddieMac Loan Number
	ServicerLoanID		N	T	100	Servicer’s Loan Number
	LoanType		N	E		Conventional, FHA, VA, USDA
	OriginalBalance		N	M		Original Loan Amount
	UPBAmount		N	M		Current Unpaid Principal Balance
	LienPriorityType		N	I		Indicates Lien Position; Enumerations: 1, 2
	PublicRecords		N	N		
	PublicRecordItem		C	N		Required when providing PublicRecords element
		PublicRecord	C	E		Required when providing PublicRecords element Will always be “Mortgage Deed of Trust”
		FilingDate	N	D		Deed of Trust Dated Date
		RecordingDate	N	D		Deed of Trust Recording Date
	Borrowers		N	N		If Loan Node/Collection is supplied, Borrowers is required
	BorrowerItem		C	N		If Borrowers Node/Collection is supplied, at least one BorrowerItem required
		LastName	C	T	50	If Borrowers Node/Collection is supplied, LastName is required Combined length of LastName + FirstName cannot exceed 50 Characters
		FirstName	C	T	50	If Borrowers Node/Collection is supplied, FirstName is required Combined length of LastName + FirstName cannot exceed 50 Characters

		BorrowerType	C	E		If Borrowers Node/Collection is supplied, BorrowerType is required Primary, Secondary
		USSSN	Y	T	11	
		Address	N	T	50	Mailing Street Address for Borrower(s)
		City	N	T	50	Mailing City for Borrower(s)
		State	N	T	2	Mailing State for Borrower(s)
		PostalCode	N	T	10	Mailing Postal Code for Borrower(s)
		Sequence	C	I		If Loan Node/Collection is supplied, Sequence is required Indicates borrower sequence. Sequence value must be the same on subsequent submissions
	Foreclosure		C	E		Attorney reference number/Case ID Required when SubscriberID is not supplied. Must match the Foreclosure value when the target Case was created
	Status		Y	E		“Open”, “On Hold”, “Closed”
	DateClosed		C	D		Required when Status is set to “Closed”
	ClosedReason		C	E		Required when Status is set to “Closed” “Bankruptcy Filed”, “Case Completed”, “Charge Off Completed”, “Consent Judgment”, “Investor Loan Sold”, “Investor Request”, “Loss Mitigation Completed”, “Low Balance Loan”, “Opened In Error”, “Paid Off / Reinstated”, “Repurchased”, “Servicer Request”, “Third Party Sale Completed”
	SaleAmount		N	M		
	SoldToName		N	E		“Back to Beneficiary”, “Third Party”, “Reverted to Senior”, “Undisclosed”
	ScheduledSaleDate		N	D		



	RedemptionDate	N	D		
	DeficiencyStatus	C	E		Required when Status is set to “Closed” and Closed Reason is “Case Completed” OR “Third Party Sale Completed” “Waived”, “Preserved”
	RedemptionAmount	N	M		
	TotalDebtLedger	N	N		Refer to Total Debt Ledger
	Delays	O	N		Refer To Decision Delay
	Forms	O	N		Refer To Import Forms
	Messages	O	N		Refer To Messages
	Attachments	O	N		Refer To Documents
	OpeningBidAmount	O	M		

### **Sample XML (With SubscriberID Binding)**

<ImportCollection>

<ForeclosureItem>

<SubscriberID>www.attorney.com-Foreclosure-10000048</SubscriberID>

<Forms>

<ImportFormItem>

<Template>Foreclosure File Received</Template>

<ProjectedCompletion>2013-04-25</ProjectedCompletion>

<ActualCompletion>2013-05-03</ActualCompletion>

<Messages\_0\_Message>Task Changed</Messages\_0\_Message>

<Messages\_0\_BodyText>Task changed because of this reason</Messages\_0\_BodyText>

</ImportFormItem>

</Forms>

</ForeclosureItem>

</ImportCollection>

### Sample XML (Using Autobind)

<ImportCollection>

<ForeclosureItem>

<Foreclosure>19-FC12345</Foreclosure>

<Loan>

<Agency>Freddie Mac</Agency>

<Loan>000135114</Loan>

</Loan>

<Forms>

<ImportFormItem>

<Template>Foreclosure File Received</Template>

<ActualCompletion>2019-10-01</ActualCompletion>

<Messages\_0\_Message>Task Changed</Messages\_0\_Message>

<Messages\_0\_BodyText>Task changed because of this reason</Messages\_0\_BodyText>

</ImportFormItem>

</Forms>

</ForeclosureItem>

</ImportCollection>

---

## [] POC – New Referral

This operation can be used to create a new POC referral.  
\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Data Definition

Node		Required	Type	Length	Description / Enumerations
ImportCollection		Y	N		
	POCItem	Y	N		
	SubscriberID	N	T	255	Unique Bankruptcy record identified in following pattern: www.<AttorneyName>.com-POC-<Loan>
	Loan	Y	N		
Agency		Y	E		Will always be “Freddie Mac”
Loan		Y	T	9	Valid FreddieMac Loan Number
	POC	Y	T	50	Unique POC case identifier for attorney
	BKCaseNo	Y	T	50	Bankruptcy case number
	Chapter	Y	E		Bankruptcy chapter
	FilingDate	Y	D		Case filing date
	BarDate	N	D		
	StateOfFiling	Y	T	2	Filing state
	DateOpened	Y	D		
	Status	Y	E		“AP Order Entered”, “APO-Stip. Automatic Default Remedy”, “APO-Stip. No Automatic Default Remedy”, “Case Dismissed”, “Hold”, “Open”, “Stay Relief Denied”, “Stay Relief Granted”
	Court	Y	E		Refer to Appendix D

	DebtorContact		Y	N		
		LastName	Y	T	50	Combined length of LastName + FirstName cannot exceed 50 Characters
		FirstName	Y	T	50	Combined length of LastName + FirstName cannot exceed 50 Characters
		USSSN	N	T	11	
		Address	N	T	50	Mailing Street Address for Debtor(s)
		City	N	T	50	Mailing City for Debtor(s)
		State	N	T	2	Mailing State for Debtor(s)
		PostalCode	N	T	10	Mailing Postal Code for Debtor(s)
		CoDebtorContact		N	O, N	
		DebtorAttorneyContact		N	O, N	
		LastName	Y	T	50	Combined length of LastName + FirstName cannot exceed 50 Characters
		FirstName	Y	T	50	Combined length of LastName + FirstName cannot exceed 50 Characters
		Address	Y	T	50	
		City	N	T	50	
		State	N	T	2	
		PostalCode	N	T	10	
		PrePostPetitionLedger		N	N	Refer to Pre Post Petition Ledger
		Delays		O	N	Refer To Decision Delay

	Forms	O	N		Refer To Import Forms
	Messages	O	N		Refer To Messages
	Attachments	O	N		Refer To Documents

Sample XML

```
<ImportCollection Reference="abc">
<POCItem>
<SubscriberID>www.attorney.com-POC-40000012</SubscriberID>
<Loan>
<Agency>Freddie Mac</Agency>
<Loan>0943079608</Loan>
</Loan>
<POC>40000012</POC>
<BKCaseNo>1234546</BKCaseNo>
<Chapter>9</Chapter>
<FilingDate>2013-01-13</FilingDate>
<StateOfFiling>FL</StateOfFiling>
<DateOpened>2013-03-29</DateOpened>
<Status>Open</Status>
<Court>Florida Southern Bankruptcy Court</Court>
<DebtorContact>
<LastName>Bankrupt</LastName>
<FirstName>Bobby</FirstName>
<USSSN>555124444</USSSN>
```

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

</DebtorContact>

<CoDebtorContact>

<LastName>Doe</LastName>

<FirstName>John</FirstName>

<USSSN>555114444</USSSN>

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

</CoDebtorContact>

<DebtorAttorneyContact>

<LastName>Attorney</LastName>

<FirstName>Contact</FirstName>

<Address>123 Attorney Street</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

</DebtorAttorneyContact>

<PrePostPetitionLedger>

<Template>Pre and Post Petition Arrearages</Template>

<Items>

```
<AccruedLateCharges>15.00</AccruedLateCharges>

</Items>

</PrePostPetitionLedger>

</POCItem>

</ImportCollection>
```

## POC Update

POC updates can consist of a variety of data points. The following table indicates the parent node requirements for a POC update. Please refer to the schema for specific field level requirements.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node		Required	Type	Length	Description / Enumerations
ImportCollection		Y	N		
	POCItem	Y	N		
	SubscriberID	C	T	255	Unique Bankruptcy record identified in following pattern: www.<AttorneyName>.com-POC-<Loan> Must match SubscriberID for existing case Required if POC node/value is not supplied
	POC	C	T	255	Unique POC case identifier for attorney Required for Autobinding if SubscriberID node/value is not supplied
	Loan	C	N		Required for Autobinding if SubscriberID node/value is not supplied
	Agency	C	E		Will always be “Freddie Mac” Required when Loan Collection is included

	Loan	C	T	9	Valid FreddieMac Loan Number Required when Loan Collection is included
	Status	Y	E		“AP Order Entered”, “APO-Stip. Automatic Default Remedy”, “APO-Stip Remedy”, “Case Dismissed”, “Closed”, “Hold”, “Open”, “Stay Relief Denied”, “Stay Relief Granted”  Status=“Closed” must be accompanied by DateClosed and ClosedReason
	DateClosed	C	D		Required when Status is set to “Closed”
	ClosedReason	C	E		“Investor Request”, “Opened In Error”, “Repurchased”, “Servicer Request”, “Discharged”, “Dismissed”, “MFR Granted”, “Paid Off / Reinstated”, “Institutional Request”, “Loss Mitigation Completed”, “POC Filed”, “STIP / APO Entered”  Required when Status is set to “Closed”
	ConvertedDate	C	D		Required when changing the Case Chapter OR when setting the Closed Reason to “Converted”
	DischargedDate	C	D		Required when setting the Closed Reason to “Discharged”
	DismissedDate	C	D		Required when setting the Closed Reason to “Dismissed”
	DebtorContact	N	N		
	CoDebtorContact	N	N		
	DebtorAttorneyContact	N	N		
	PrePostPetitionLedger	N	N		Refer to Pre Post Petition Ledger
	Delays	N	N		Refer To Decision Delay
	Forms	N	N		Refer To Import Forms
	Messages	N	N		Refer To Messages



	Attachments	N	N	Refer To Documents
--	-------------	---	---	--------------------

Sample XML

```
<ImportCollection>

<POCItem>

<SubscriberID>www.attorney.com-POC-10000000</SubscriberID>

<DateClosed>2013-04-15</DateClosed>

<ClosedReason>Case Completed</ClosedReason>

<CoDebtorContact>

<LastName>Doe</LastName>

<FirstName>John</FirstName>

<USSSN>555114444</USSSN>

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

</CoDebtorContact>

<PrePostPetitionLedger>

<Template>Pre and Post Petition Arrearages</Template>

<Items>

<AccruedLateCharges>15.00</AccruedLateCharges>

</Items>

</PrePostPetitionLedger>

</POCItem>

</ImportCollection>
```

# [ ] MFR – New Referral

This operation can be used to create a new MFR referral.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

## Data Definition

Node		Required	Type	Length	Description / Enumerations
ImportCollection		Y	N		
	MFRItem	Y	N		
	SubscriberID	N	T	255	Unique Bankruptcy record identifier pattern: www.<AttorneyName>.com-MFR-<
	Loan	Y	N		
Agency		Y	E		Will always be “Freddie Mac”
Loan		Y	T	9	Valid FreddieMac Loan Number
	MFR	Y	T	50	Attorney reference number
	BKCaseNo	Y	T	50	Bankruptcy case number
	Chapter	Y	E		Bankruptcy chapter
	FilingDate	Y	D		Case filing date
	BarDate	N	D		
	StateOfFiling	Y	E	2	Filing state
	DateOpened	Y	D		
	Status	Y	E		“AP Order Entered”, “APO-Stip. Automatic Remedy”, “APO-Stip. No Automatic

						“Case Dismissed”, “Hold”, “Open”, “Stay Relief Granted”
	Court		Y	E		Refer to Appendix D
	DebtorContact		Y	N		
		LastName	Y	T	50	Combined length of LastName + First Name cannot exceed 50 Characters
		FirstName	Y	T	50	Combined length of LastName + First Name cannot exceed 50 Characters
		USSSN	N	T	11	
		Address	N	T	50	Mailing Street Address for Debtor(s)
		City	N	T	50	Mailing City for Debtor(s)
		State	N	T	2	Mailing State for Debtor(s)
		PostalCode	N	T	10	Mailing Postal Code for Debtor(s)
	CoDebtorContact		N	O, N		
	DebtorAttorneyContact		N	O, N		
		LastName	Y	T	50	Combined length of LastName + First Name cannot exceed 50 Characters
		FirstName	Y	T	50	Combined length of LastName + First Name cannot exceed 50 Characters
		Address	N	T	50	
		City	N	T	50	
		State	N	T	2	

		PostalCode		N		T	10		
	PrePostPetitionLedger	N		N				Refer to Pre Post Petition Ledger	
	Delays	O		N				Refer To Decision Delay	
	Forms	O		N				Refer To Import Forms	
	Messages	O		N				Refer To Messages	
	Attachments	O		N				Refer To Documents	

Sample XML

```
<ImportCollection Reference="abc">
<MFRItem>
<SubscriberID>www.attorney.com-MFR-40000030</SubscriberID>
<Loan>
<Agency>Freddie Mac</Agency>
<Loan>0996242716</Loan>
</Loan>
<MFR>40000030</MFR>
<BKCaseNo>1234546</BKCaseNo>
<Chapter>9</Chapter>
<FilingDate>2013-01-13</FilingDate>
<StateOfFiling>FL</StateOfFiling>
<DateOpened>2013-03-29</DateOpened>
<Status>Open</Status>
<Court>Florida Southern Bankruptcy Court</Court>
<DebtorContact>
```

<LastName>Bankrupt</LastName>

<FirstName>Bobby</FirstName>

<USSSN>555124444</USSSN>

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

</DebtorContact>

<CoDebtorContact>

<LastName>Doe</LastName>

<FirstName>John</FirstName>

<USSSN>555114444</USSSN>

<Address>123 Maple</Address>

<City>Miami</City>

<State>FL</State>

<PostalCode>33135</PostalCode>

</CoDebtorContact>

<DebtorAttorneyContact>

<LastName>Attorney</LastName>

<FirstName>Contact</FirstName>

<Address>123 Attorney Street</Address>

<City>Ocala</City>

<State>FL</State>

<PostalCode>33139</PostalCode>

</DebtorAttorneyContact>

```
<PrePostPetitionLedger>

<Template>Pre and Post Petition Arrearages</Template>

<Items>

<AccruedLateCharges>10.00</AccruedLateCharges>

</Items>

</PrePostPetitionLedger>

<Forms>

<ImportFormItem>

<Template>Bankruptcy File Received</Template>

<ProjectedCompletion>2013-04-25</ProjectedCompletion>

<ActualCompletion>2013-04-26</ActualCompletion>

<Messages_0_Message>Task Changed</Messages_0_Message>

<Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>

</ImportFormItem>

</Forms>

</MFRItem>

</ImportCollection>
```

## [ ] MFR – Update

MFR updates can consist of a variety of data points. The following table indicates the parent node requirements for a MFR update. Please refer to the schema for specific field level requirements.

**\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\***

Node	Required	Type	Length	Description / Enumerations
ImportCollection	Y	N		

	MFRItem	Y	N		
	SubscriberID	C	T	255	Unique Bankruptcy record identified in following pattern: www.<AttorneyName>.com-MFR-<Loan> Must match SubscriberID for existing case Required if MFR node/value is not supplied
	MFR	C	T	255	Unique MFR case identifier for attorney Required for Autobinding if SubscriberID node/value is not supplied
	Loan	C	N		Required for Autobinding if SubscriberID node/value is not supplied
	Agency	C	E		Will always be “Freddie Mac” Required when Loan Collection is included
	Loan	C	T	9	Valid FreddieMac Loan Number Required when Loan Collection is included
	Status	Y	E		“AP Order Entered”, “APO-Stip. Automatic Default Remedy”, “APO-Stip Default Remedy”, “Case Dismissed”, “Closed”, “Hold”, “Open”, “Stay Re Relief Granted”  Status=“Closed” must be accompanied by DateClosed and ClosedReason
	DateClosed	C	D		Required when Status is set to “Closed”
	ClosedReason	C	E		“Investor Request”, “Opened In Error”, “Repurchased”, “Servicer Request Converted”, “Discharged”, “Dismissed”, “MFR Granted”, “Paid Off / Re Loan Sold”, “Loss Mitigation Completed”, “POC Filed”, “STIP / APO Enter  Required when Status is set to “Closed”
	ConvertedDate	C	D		Required when changing the Case Chapter OR when setting the Closed Reason Converted”
	DischargedDate	C	D		Required when setting the Closed Reason to “Discharged”
	DismissedDate	C	D		Required when setting the Closed Reason to “Dismissed”

	DebtorContact	N	N		
	CoDebtorContact	N	N		
	DebtorAttorneyContact	N	N		
	PrePostPetitionLedger	N	N		Refer to Pre Post Petition Ledger
	Delays	N	N		Refer To Decision Delay
	Forms	N	N		Refer To Import Forms
	Messages	N	N		Refer To Messages
	Attachments	N	N		Refer To Documents

Sample XML

```
<ImportCollection>

<MFRItem>

<SubscriberID>www.attorney.com-MFR-40000030</SubscriberID>

<DateClosed>2013-04-15</DateClosed>

<ClosedReason>Case Completed</ClosedReason>

</MFRItem>

</ImportCollection>
```

---

# **[ ] Message**

This stand-alone operation can be used to post a message to an existing Foreclosure, POC or an MFR referral.

**\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\***



Data Definition

Node		Required	Type	Length	Description / Enumerations
ImportCollection		Y	N		
Reference		N	A	50	reference number
	MessageItem	Y	N		
	Object	Y	E		Foreclosure, Bankruptcy Required if Parent Process ID (Foreclosure, MFR or POC) is not supplied
	ObjectSubscriberID	Y	T	255	SubscriberID of Foreclosure, POC or MFR Must match SubscriberID for existing case Required if Parent Process ID (Foreclosure, MFR or POC) is not supplied
	Foreclosure	€	≠	50	Unique attorney Case ID for Foreclosure Case Must match a Case ID for an existing Foreclosure Case assigned to the firm Required if Parent Process is a Foreclosure and Object/ObjectSubscriberID is supplied
	POC	€	≠	50	Unique attorney Case ID for POC Case Must match a Case ID for an existing POC Case assigned to the firm Required if Parent Process is a Bankruptcy POC and Object/ObjectSubscriberID is supplied
	MFR	€	≠	50	Unique attorney Case ID for MFR Case Must match a Case ID for an existing MFR Case assigned to the firm Required if Parent Process is a Bankruptcy MFR and Object/ObjectSubscriberID is supplied
	Template	Y	E		Valid message template – “Attorney Message”
	Message	Y	T	50	Message Subject
	BodyText	N	T	N/A	Message Text

Sample XML

```
<ImportCollection Reference="abc">

<MessageItem>

<Object>Bankruptcy</Object>

<ObjectSubscriberID>www.attorney.com-MFR-40000030</ObjectSubscriberID>

<Template>Attorney Message</Template>

<Message>This is the subject</Message>

<BodyText>Message Content Goes here</BodyText>

</MessageItem>

</ImportCollection>
```

## Document

This stand-alone operation can be used to upload a document to an existing Foreclosure, POC or an MFR referral.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Data Definition

Node		Required	Type	Length	Description / Enumerations
ImportCollection		Y	N		
	AttachmentItem	Y	N		
	Object	Y	E		Foreclosure, Bankruptcy Required if Parent Process ID (Foreclosure, MFR or POC) is not supplied
	ObjectSubscriberID	Y	T	255	SubscriberID of Foreclosure, POC or MFR Must match SubscriberID for existing case Required if Parent Process ID (Foreclosure, MFR or POC) is not supplied
	Foreclosure	Y	T	50	Unique attorney Case ID for Foreclosure Case Must match a Case ID for an existing Foreclosure Case assigned to the

					Required if Parent Process is a Foreclosure and Object/ObjectSubscriberID are not supplied
	POC	€	±	50	Unique attorney Case ID for POC Case Must match a Case ID for an existing POC Case assigned to the firm Required if Parent Process is a Bankruptcy POC and Object/ObjectSubscriberID are not supplied
	MFR	€	±	50	Unique attorney Case ID for MFR Case Must match a Case ID for an existing MFR Case assigned to the firm Required if Parent Process is a Bankruptcy MFR and Object/ObjectSubscriberID are not supplied
	FileName	Y	T	50	File Name
	Template	Y	E		Valid document template name
	Description	N	T	N/A	Document description
	Content	Y	T	N/A	Base64 encoded document content

Sample XML

```
<ImportCollection>
<AttachmentItem>
<Object>Bankruptcy</Object>
<ObjectSubscriberID>www.attorney.com-MFR-40000030</ObjectSubscriberID>
<FileName>DocketList.pdf</FileName>
<Template>BK Document</Template>
<Description>Description goes here</Description>
<Content><![CDATA[Base64 Content]]></Content>
</AttachmentItem>
</ImportCollection>
```

---

# ImportForm

This stand-alone operation can be used to update an ImportForm for an existing Foreclosure, POC or MFR referral.  
This operation is primarily used to project and complete step dates.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

## Data Definition

Node		Required	Type	Length	Description / Enumerations
ImportCollection		Y	N		
	ImportFormItem	Y	N		
	Object	Y	E	50	Foreclosure, Bankruptcy Required if Parent Process ID (Foreclosure, MFR) is not supplied
	ObjectSubscriberID	Y	T	255	SubscriberID of Foreclosure, POC or MFR Must match SubscriberID for existing case Required if Parent Process ID (Foreclosure, MFR) is not supplied
	Foreclosure	€	⚭	50	Unique attorney Case ID for Foreclosure Case Must match a Case ID for an existing Foreclosure Case Required if Parent Process is a Foreclosure and Object/SubscriberID are not supplied
	POC	€	⚭	50	Unique attorney Case ID for POC Case Must match a Case ID for an existing POC Case Required if Parent Process is a Bankruptcy POC and Object/SubscriberID are not supplied
	MFR	€	⚭	50	Unique attorney Case ID for MFR Case Must match a Case ID for an existing MFR Case Required if Parent Process is a Bankruptcy MFR and Object/SubscriberID are not supplied
	Template	Y	E		Valid Import Form or Milestone template name
	ProjectedCompletion	C	O, D		At least one of the dates required

	ActualCompletion	C	O, D		At least one of the dates required
	Messages_0_Message	Y	T	N/A	“Task Changed”
	Messages_0_BodyText	Y	T	N/A	Message text
	Foreclosure_Loan_UPBAmount	C	A		Required while completing ‘Foreclosure Sale H
	Foreclosure_BidAtSale_BidOpening	C	A		Required while completing ‘Foreclosure Sale H
	Foreclosure_BidAtSale_BidMax	C	A		Required while completing ‘Foreclosure Sale H
	Foreclosure_BidAtSale_BidDue	C	D		Required while completing ‘Foreclosure Sale H
	Foreclosure_SoldToName	C	E		Required while completing ‘Foreclosure Sale H (Undisclosed, Third Party, Reverted to Senior, )
	Foreclosure_SaleAmount	C	A		Required while completing ‘Foreclosure Sale H
	Foreclosure_TotalDebtLedger_AmountMoney	C	A		Required while completing ‘Foreclosure Sale H
	Foreclosure_TotalDebtLedger_PostedDate	C	D		Total Debt Amount as-of date; Required while Held’ steps
	Foreclosure_TotalDebtLedger_Ledger	C	T		Required while completing ‘Foreclosure Sale H
	Foreclosure_DeficiencyStatus	C	E		Required while completing ‘Foreclosure Sale H Closure’ step. Values (Preserved, Waived)
	Foreclosure_ThirdPartyContact_Contact	C	T		Required while completing ‘Foreclosure Sale H Third Party.
	Foreclosure_ThirdPartyContact_Address	C	T		Required while completing ‘Foreclosure Sale H Third Party.
	Foreclosure_ThirdPartyContact_City	C	T		Required while completing ‘Foreclosure Sale H Third Party.

	Foreclosure_ThirdPartyContact_State	C	T		Required while completing 'Foreclosure Sale H 'Third Party.
	Foreclosure_ThirdPartyContact_PostalCode	C	T		Required while completing 'Foreclosure Sale H 'Third Party.
	Foreclosure_ThirdPartyContact_Phone	C	T		Required while completing 'Foreclosure Sale 'Third Party.
	Foreclosure_FCCaseNumber	C	T		Required while completing 'Complaint Filed' st
	Foreclosure_Status	C	E		Required while completing 'Foreclosure Case C
	Foreclosure_ClosedReason	C	E		Required while completing 'Foreclosure Case C (Bankruptcy Filed, Case Completed, Charge Of Judgment, Investor Loan Sold, Investor Reque Low Balance Loan, Opened In Error, Paid Off / Servicer Request, Third Party Sale Completed)
	Foreclosure_DateClosed	C	D		Required while completing 'Foreclosure Case C
	Bankruptcy_Status	C	E		Required while completing 'Bankruptcy Case C
	Bankruptcy_ClosedReason	C	E		Required while completing 'Bankruptcy Case C Request, Opened In Error, Repurchased, Servi Discharged, Dismissed, MFR Granted, Paid Of Sold, Loss Mitigation Completed, POC Filed, ST
	Bankruptcy_DateClosed	C	D		Required while completing 'Bankruptcy Case C

Sample XML

<ImportCollection>

<ImportFormItem>

<Object>Foreclosure</Object>

<ObjectSubscriberID>www.attorney.com-Foreclosure-10000047</ObjectSubscriberID>

<Template>Foreclosure File Received</Template>

<ProjectedCompletion>2013-04-25</ProjectedCompletion>

<ActualCompletion>2013-04-26</ActualCompletion>

<Messages\_0\_Message>Task Changed</Messages\_0\_Message>

<Messages\_0\_BodyText>Task changed because of this reason</Messages\_0\_BodyText>

</ImportFormItem>

</ImportCollection>

### Sample XML (For 'Foreclosure Sale Held' step)

<ImportCollection Reference="13686">

<ImportFormItem>

<Object>Foreclosure</Object>

<ObjectSubscriberID>www. attorney.com-Foreclosure-0477796788</ObjectSubscriberID>

<Template>Foreclosure Sale Held</Template>

<ActualCompletion>2014-03-10</ActualCompletion>

<Foreclosure\_Loan\_UPBAmount>210000</Foreclosure\_Loan\_UPBAmount>

<Foreclosure\_BidAtSale\_BidOpening>20000</Foreclosure\_BidAtSale\_BidOpening>

<Foreclosure\_BidAtSale\_BidMax>255000</Foreclosure\_BidAtSale\_BidMax>

<Foreclosure\_BidAtSale\_BidDue>2014-03-10</Foreclosure\_BidAtSale\_BidDue>

<Foreclosure\_SoldToName>Undisclosed</Foreclosure\_SoldToName>

<Foreclosure\_SaleAmount>250000</Foreclosure\_SaleAmount>

<Foreclosure\_TotalDebtLedger\_AmountMoney>100000</Foreclosure\_TotalDebtLedger\_AmountMoney>

<Foreclosure\_TotalDebtLedger\_PostedDate>2014-02-04</Foreclosure\_TotalDebtLedger\_PostedDate>

<Foreclosure\_TotalDebtLedger\_Ledger>Total Debt</Foreclosure\_TotalDebtLedger\_Ledger>

<Foreclosure\_DeficiencyStatus>Waived</Foreclosure\_DeficiencyStatus>

<Messages\_0\_Message>Task Changed</Messages\_0\_Message>

<Messages\_0\_BodyText>Task changed because of this reason</Messages\_0\_BodyText>

</ImportFormItem>

</ImportCollection>

Sample XML (For 'Foreclosure Sale Held' step)

<ImportCollection Reference="13686">

<ImportFormItem>

<Object>Foreclosure</Object>

<ObjectSubscriberID>www. attorney.com-Foreclosure-0477796788</ObjectSubscriberID>

<Template>Foreclosure Sale Held</Template>

<ActualCompletion>2014-03-10</ActualCompletion>

<Foreclosure\_Loan\_UPBAmount>210000</Foreclosure\_Loan\_UPBAmount>

<Foreclosure\_BidAtSale\_BidOpening>20000</Foreclosure\_BidAtSale\_BidOpening>

<Foreclosure\_BidAtSale\_BidMax>255000</Foreclosure\_BidAtSale\_BidMax>

<Foreclosure\_BidAtSale\_BidDue>2014-03-10</Foreclosure\_BidAtSale\_BidDue>

<Foreclosure\_SoldToName>Third Party</Foreclosure\_SoldToName>

<Foreclosure\_SaleAmount>250000</Foreclosure\_SaleAmount>

<Foreclosure\_TotalDebtLedger\_AmountMoney>100000</Foreclosure\_TotalDebtLedger\_AmountMoney>

<Foreclosure\_TotalDebtLedger\_PostedDate>2014-02-04</Foreclosure\_TotalDebtLedger\_PostedDate>

<Foreclosure\_TotalDebtLedger\_Ledger>Total Debt</Foreclosure\_TotalDebtLedger\_Ledger>

<Foreclosure\_ThirdPartyContact\_Contact>Quandis</Foreclosure\_ThirdPartyContact\_Contact>

<Foreclosure\_ThirdPartyContact\_Address>123 Portola Pkwy</Foreclosure\_ThirdPartyContact\_Address>

<Foreclosure\_ThirdPartyContact\_City>Foothill Ranch</Foreclosure\_ThirdPartyContact\_City>



```
<Foreclosure_ThirdPartyContact_State>CA</Foreclosure_ThirdPartyContact_State>

<Foreclosure_ThirdPartyContact_PostalCode>925604</Foreclosure_ThirdPartyContact_PostalCode>

<Foreclosure_ThirdPartyContact_Phone>949-525-1111</Foreclosure_ThirdPartyContact_Phone>

<Foreclosure_DeficiencyStatus>Preserved</Foreclosure_DeficiencyStatus>

<Messages_0_Message>Task Changed</Messages_0_Message>

<Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>

</ImportFormItem>

</ImportCollection>
```

#### Sample XML (For 'Foreclosure Case Closure' step)

```
<ImportCollection Reference="13686">

  <ImportFormItem>

    <Object>Foreclosure</Object>

    <ObjectSubscriberID>www. attorney.com-Foreclosure-0477796788</ObjectSubscriberID>

    <Template>Foreclosure Case Closure</Template>

    <ActualCompletion>2017-08-10</ActualCompletion>

    <Foreclosure_Status>Closed</Foreclosure_Status>

    <Foreclosure_ClosedReason>Case Completed</Foreclosure_ClosedReason>

    <Foreclosure_DateClosed>2017-08-11</Foreclosure_DateClosed>

    <Foreclosure_DeficiencyStatus>Preserved</Foreclosure_DeficiencyStatus>

    <Messages_0_Message>Task Changed</Messages_0_Message>

    <Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>

  </ImportFormItem>

</ImportCollection>
```

Sample XML (For 'Bankruptcy Case Closure' step)

```
<ImportCollection Reference="13686">
<ImportFormItem>
<Object>Bankruptcy</Object>
<ObjectSubscriberID>www. attorney.com-Bankruptcy-01777967A</ObjectSubscriberID>
<Template>Bankruptcy Case Closure</Template>
<ActualCompletion>2017-08-10</ActualCompletion>
<Bankruptcy_Status>Closed</Bankruptcy_Status>
<Bankruptcy_ClosedReason>Discharged</Bankruptcy_ClosedReason>
<Bankruptcy_DateClosed>2017-08-11</Bankruptcy_DateClosed>
<Messages_0_Message>Task Changed</Messages_0_Message>
<Messages_0_BodyText>Task changed because of this reason</Messages_0_BodyText>
</ImportFormItem>
</ImportCollection>
```

# [ ] EMBEDDED OBJECT STRUCTURES

The following objects structures are reused with Foreclosure, MFR, POC referral and update formats.

## [ ] Total Debt Ledger

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

The Total Debt Ledger is used by Foreclosure referrals:

Node	Required	Type	Length	Description / Enumerations
TotalDebtLedger	Y	N		

	Template	Y	E		Total Debt
	Items		N		
	AccruedLateCharges	N	M		
	BKFeesCosts	N	M		
	CorporateAdvanceBalance	N	M		
	CorporateAdvances	N	M		
	EscrowBalance	N	M		
	FundsinSuspense	N	M		
	OtherCosts	N	M		
	PendingAdvances	N	M		
	PerDiem	N	M		
	PrincipalBalance	N	M		
	RentsCollected	N	M		
	TotalDueBeneficiaryasofSaleDate	N	M		
	FCFeesCosts	O	N		
	Items	Y	N		
	ForeclosureFee	N	M		

# [] Pre Post Petition Ledger

The Pre Post Petition Ledger is used by both MFR and POC referrals:

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node		Required	Type	Length	Description / Enumerations
PrePostPetitionLedger		Y	N		
	Template	Y	E		Pre and Post Petition Arrearages
	Items	Y	N		
	AccruedLateCharges	N	M		
	BKFeesCosts	N	M		
	CorporateAdvanceBalance	N	M		
	CorporateAdvances	N	M		
	EscrowBalance	N	M		
	FCFeesCosts	N	M		
	FundsInSuspense	N	M		
	InterestFrom	N	M		
	OtherCosts	N	M		
	Payments	N	M		
	PendingAdvances	N	M		
	PerDiem	N	M		
	PrincipalBalance	N	M		

	RentsCollected	N	M		
	TotalDueBeneficiaryasofSaleDate	N	M		

## [ ] Decision Delay

Decision Delays are used by all referral types to indicate when a file is set to delay.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node		Required	Type	Length	Description / Enumerations
Delays		Y	N		Used to post Decision Delays
	DecisionDelayItem	Y	N		
	DecisionDelayTemplate	Y	E		Refer to Appendix B
	ActualStart	Y	D		
	ProjectedCompletion	Y	D		
	ActualCompletion	C	D		
	Message_0_Message	N	E		“Delay Changed”
	Messages_0_BodyText	N	T	NA	Message indicating delay reason
	PartyStatusCode	Y	E		Applicable only to ‘Litigation Detail’
	LitigationStatusCode	Y	E		Applicable only to ‘Litigation Detail’
	LitigationDate	Y	D		Applicable only to ‘Litigation Detail’

	LitigationClaimCode	Y	E		Applicable only to 'Litigation Detail'
--	---------------------	---	---	--	--

Sample XML for 'Litigation Detail'

```
<ImportCollection>

<ForeclosureItem>

<SubscriberID>www.attorney.com-Foreclosure-10000019</SubscriberID>

<Delays>

<DecisionDelayItem>

<DecisionDelayTemplate>Litigation Detail</DecisionDelayTemplate>

<ActualStart>2013-12-01</ActualStart>

<ProjectedCompletion>2014-10-20</ProjectedCompletion>

<Messages_0_Message>Delay Changed</Messages_0_Message>

<Messages_0_BodyText>Body Text</Messages_0_BodyText>

<PartyStatusCode>FM Party Plaintiff</PartyStatusCode>

<LitigationStatusCode>Trial Date</LitigationStatusCode>

<LitigationDate>2013-11-15</LitigationDate>

<LitigationClaimCode>HAMP claim</LitigationClaimCode>

</DecisionDelayItem>

</Delays>

</ForeclosureItem>

</ImportCollection>
```

## Import Form

Import Forms are used to update an ImportForm for an existing Foreclosure, POC or MFR referral.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node		Required	Type	Length	Description / Enumerations
Forms		O	N		Used to update milestones on a Foreclosure
	ImportFormItem	Y	N		
	Template	Y	E		Refer to Appendix A “Templates”
	ProjectedCompletion	C	D		One of the two dates must be included
	ActualCompletion	C	D		One of the two dates must be included
	Messages_0_Message	Y	E		“Task Changed”
	Messages_0_BodyText	Y	T	N/A	Message text

## [] Messages

Messages are used to add messages for a given file.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node	Required	Type	Length	Description / Enumerations
Messages	Y	N		

	MessageItem	Y	N		
	Template	Y	E		Valid message template
	Message	Y	T	50	Message Subject
	BodyText	N	T	N/A	Message Text

## [] Documents

Documents are used to add a document under a file.

\*\*\*\*The structure of the XML submitted must follow the order found in the table below\*\*\*\*

Node		Required	Type	Length	Description / Enumerations
Attachments		O	N		Used to post a document on a file
	AttachmentItem	Y	N		
	FileName	Y	T	50	Document name which includes file extension
	Template	Y	E		Valid document template
	Description	N	T	N/A	Document description
	Content	Y	T	N/A	Base64 encoded document content



## [ ] APPENDIX A: WORKFLOW STEPS

Workflow Steps can be found in the Attorney User Guide

[[http://www.quandis.com/freddiemacadr\\_attorneyguide.html#state-workflow](http://www.quandis.com/freddiemacadr_attorneyguide.html#state-workflow)]

## [ ] APPENDIX B: DECISION DELAY TEMPLATES

The following is a list of hold templates in ADR.

- Applies To indicates the file type
- Previous Template Name indicates a Template name change, with change date in parentheses

Template	Applies To	Previous Template Name
Bankruptcy Ch 7	Foreclosure	
Bankruptcy Ch 11	Foreclosure	
Bankruptcy Ch 12	Foreclosure	
Bankruptcy Ch 13	Foreclosure	

Contested	Foreclosure	NEW (3/10/17)
DIL	Foreclosure	NEW (3/10/17)
Document Delay	Foreclosure	NEW (3/10/17)
Forebearance Agreement	Foreclosure	
FRE Moratorium	Foreclosure	NEW (3/10/17)
HAF	Foreclosure	NEW (6/29/22)
HAMP	Foreclosure	
JR. Lien Bankruptcy	Foreclosure	NEW (3/10/17)
Litigation Detail	Foreclosure	
Loss Mitigation	Foreclosure	NEW (3/10/17)
Low Balance Loan	Foreclosure	
Mediation	Foreclosure	
Modification	Foreclosure	NEW (3/10/17)
OCC	Foreclosure	
Probate	Foreclosure	NEW (3/10/17)
Property Issues / Seizure	Foreclosure	Property Issue (3/10/17)
Repay Plan	Foreclosure	
SCRA	Foreclosure	NEW (3/10/17)
Servicer Issued	Foreclosure	Servicer Issued Hold/Delay (3/10/17)
Short Sale	Foreclosure	NEW (3/10/17)

Statutory/Jurisdictional Delay	Foreclosure	
Title Issue	Foreclosure	NEW (3/10/17)
	Foreclosure	Account Current (Removed 3/10/17)
	Foreclosure	Adequate Protection Order(Removed 3/10/17)
	Foreclosure	BK Motion Withdrawn (Removed 3/10/17)
	Foreclosure	Cease and Desist (Removed 3/10/17)
	Foreclosure	Consent Order (Removed 3/10/17)
	Foreclosure	Cramdown (Removed 3/10/17)
	Foreclosure	Credit Counseling (Removed 3/10/17)
	Foreclosure	Deceased Borrower (Removed 3/10/17)
	Foreclosure	Delegated Postponement (Removed 3/10/17)
	Foreclosure	DIL Approved (Removed 3/10/17)
	Foreclosure	Environmental (Removed 3/10/17)
	Foreclosure	Executive Communication (Removed 3/10/17)
	Foreclosure	FC Freddie Mac Designated Counsel (Removed 3/10/17)
	Foreclosure	Forbearance (Removed 3/10/17)
	Foreclosure	FRE Moratorium (Hurricane Sandy) (Removed 3/10/17)
BK DIL	Bankruptcy	NEW (3/10/17)
BK Document Delay	Bankruptcy	NEW (3/10/17)

BK Forebearance Agreement	Bankruptcy	NEW (3/10/17)
BK FRE Moratorium	Bankruptcy	NEW (3/10/17)
BK HAMP	Bankruptcy	NEW (3/10/17)
BK Litigation	Bankruptcy	NEW (3/10/17)
BK Loss Mitigation	Bankruptcy	NEW (3/10/17)
BK Modification	Bankruptcy	NEW (3/10/17)
BK Probate	Bankruptcy	NEW (3/10/17)
BK Property Issues / Seizure	Bankruptcy	NEW (3/10/17)
BK Repay Plan	Bankruptcy	NEW (3/10/17)
BK SCRA	Bankruptcy	NEW (3/10/17)
BK Servicer Issued	Bankruptcy	NEW (3/10/17)
BK Short Sale	Bankruptcy	NEW (3/10/17)
BK Title Issue	Bankruptcy	NEW (3/10/17)
	Bankruptcy	BK Freddie Mac Designated Counsel (Removed 3/10/17)
	Bankruptcy	BK Hold (Removed 3/10/17)
	Bankruptcy	Stip/APO (Removed 3/10/17)

The following are the valid enumerations for Litigation Detail elements:

Element	Valid Values
Party Status Code	FM Party Plaintiff

	FM Party Defendant
	FM not named
Litigation Status Code	Complaint Filed
	Dispositive Motion Filed
	Discovery Period
	Trial Date
	Notice of appeal Filed
	Appellate Briefing Schedule
	Post Trial Proceedings
Litigation Claim Code	Conservatorship issue or challenge
	Federal Instrumentality status
	Charter interpretation or challenge
	Freddie Mac as Federal Agency or Government Actor claim
	Constitutional claim, including due process
	Class Action claim
	MERS claim
	Environmental claim
	Order to Show Cause, Sanction Motion or Hearings

	HAMP claim
	Predatory Lending claim
	Ability to Re-pay claim
	Discrimination claim
	Uniform Mortgage Instrument claim
	Other

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## [ ] APPENDIX C: COURT LIST

Court	State
Alaska Bankruptcy Court	AK
Alabama Middle Bankruptcy Court	AL
Alabama Northern Bankruptcy Court	AL
Alabama Southern Bankruptcy Court	AL
Arkansas Eastern Bankruptcy Court	AR
Arkansas Western Bankruptcy Court	AR
Arizona Bankruptcy Court	AZ
California Central Bankruptcy – L.A.	CA

California Central Bankruptcy – N.D.	CA
California Central Bankruptcy – R.S.	CA
California Central Bankruptcy – S.A.	CA
California Central Bankruptcy – S.V.	CA
California Eastern Bankruptcy Court	CA
California Northern Bankruptcy Court	CA
California Southern Bankruptcy Court	CA
Central District Of California	CA
Colorado Bankruptcy Court	CO
Connecticut Bankruptcy Court	CT
District Of Columbia Bankruptcy Court	DC
Delaware Bankruptcy Court	DE
Florida Middle Bankruptcy Court	FL
Florida Northern Bankruptcy Court	FL
Florida Southern Bankruptcy Court	FL
Georgia Northern Bankruptcy Court	GA
Georgia Southern Bankruptcy Court	GA
Middle District of Georgia	GA
Guam Bankruptcy Court	GU
Hawaii Bankruptcy Court	HI

Iowa Northern Bankruptcy Court	IA
Iowa Southern Bankruptcy Court	IA
Idaho Bankruptcy Court	ID
Illinois Central Bankruptcy Court	IL
<del>Illinois Northern Bankruptcy – Chicago – ECF</del> Illinois Northern Bankruptcy	IL
Illinois Southern Bankruptcy Court	IL
Indiana Northern Bankruptcy Court	IN
<del>Indiana Southern Bankruptcy – ECF</del> Indiana Southern Bankruptcy	IN
Kansas Bankruptcy Court	KS
Kentucky Eastern Bankruptcy Court	KY
Kentucky Western Bankruptcy Court	KY
Louisiana Eastern Bankruptcy Court	LA
Louisiana Middle Bankruptcy Court	LA
Louisiana Western Bankruptcy Court	LA
Massachusetts Bankruptcy Court	MA
Maryland Bankruptcy Court	MD
Maine Bankruptcy Court	ME
Michigan Eastern Bankruptcy Court	MI



Michigan Western Bankruptcy Court	MI
Minnesota Bankruptcy Court	MN
Missouri Eastern Bankruptcy Court	MO
Missouri Western Bankruptcy Court	MO
Mississippi Northern Bankruptcy Court	MS
Mississippi Southern Bankruptcy Court	MS
Montana Bankruptcy Court	MT
<del>North Carolina Eastern Bankruptcy – ECF</del> North Carolina Eastern Bankruptcy	NC
North Carolina Middle Bankruptcy Court	NC
North Carolina Western Bankruptcy Court	NC
North Dakota Bankruptcy Court	ND
Nebraska Bankruptcy Court	NE
New Hampshire Bankruptcy Court	NH
New Jersey Bankruptcy Court	NJ
New Mexico Bankruptcy Court	NM
Nevada Bankruptcy Court	NV
New York Eastern Bankruptcy Court	NY
New York Northern Bankruptcy Court	NY
New York Southern Bankruptcy Court	NY

New York Western Bankruptcy Court	NY
Ohio Northern Bankruptcy Court	OH
Ohio Southern Bankruptcy Court	OH
Oklahoma Eastern Bankruptcy Court	OK
Oklahoma Northern Bankruptcy Court	OK
Oklahoma Western Bankruptcy Court	OK
Oregon Bankruptcy Court	OR
Pennsylvania Eastern Bankruptcy Court	PA
Pennsylvania Middle Bankruptcy Court	PA
Pennsylvania Western Bankruptcy Court	PA
Puerto Rico Bankruptcy Court	PR
Rhode Island Bankruptcy Court	RI
South Carolina Bankruptcy Court	SC
South Dakota Bankruptcy Court	SD
Tennessee Eastern Bankruptcy Court	TN
Tennessee Middle Bankruptcy Court	TN
Tennessee Western Bankruptcy Court	TN
Texas Eastern Bankruptcy Court	TX
Texas Northern Bankruptcy Court	TX
Texas Southern Bankruptcy Court	TX

Texas Western Bankruptcy Court	TX
Utah Bankruptcy Court	UT
<del>Virginia Eastern Bankruptcy — ECF</del> Virginia Eastern Bankruptcy	VA
Virginia Western Bankruptcy Court	VA
Vermont Bankruptcy Court	VT
Washington Eastern Bankruptcy Court	WA
Washington Western Bankruptcy Court	WA
Wisconsin Eastern Bankruptcy Court	WI
Wisconsin Eastern Bankruptcy Court	WI
Wisconsin Western Bankruptcy Court	WI
West Virginia Northern Bankruptcy Court	WV
West Virginia Southern Bankruptcy Court	WV
Wyoming Bankruptcy Court	WY

---

# [ ] APPENDIX D: LEDGER TEMPLATES

The following is a list of ledger templates in ADR.

- Applies To indicate the file type
- DCS Template Name maps the previous DCS Ledger Template

Template	Applies To	Ledger Item	DCS Template Name
Total Debt	Foreclosure	Accrued Late Charges	Outstanding Late Charges
		Escrow Balance	Escrow Balance
		Funds in Suspense	Suspense Balance
		Interest from	Interest From L.I.
		Per Diem	
		Principal Balance	Unpaid Principal Balance
		Rents Collected	
		Total Due Beneficiary as of Sale Date	
		Corporate Advance Balance	Non-Escrow Advances
		Other Costs	Other Fees
		Pending Advances	
		BK Fees / Costs	
		FC Fees / Costs	
		Corporate Advances	
		Payments	

--	--	--	--

Pre and Post Petition Arrearages	Bankruptcy	Accrued Late Charges	
		Escrow Balance	
		Funds in Suspense	
		Interest from	
		Per Diem	
		Principal Balance	
		Rents Collected	
		Total Due Beneficiary as of Sale Date	
		Corporate Advance Balance	
		Other Costs	
		Pending Advances	
		BK Fees / Costs	
		FC Fees / Costs	
		Corporate Advances	
		Payments	

# APPENDIX E: FAQ & TROUBLESHOOTING

The following are commonly asked questions related to ADR integration.

## **Q: Are Property and Loan information required in the XML when submitting ADR?**

Answer: No. Only the Freddie Mac loan number is required when submitting the referral. The ADR system already contains property and loan data which is boarded by FHLMC on a daily basis. It is important the correct loan number is provided at time of referral as the referral is bound based on loan number at time of submission.

## **Q: In DCS referrals required an AttorneySubscriberID value that bound the attorney to the referral. Is this required in ADR?**

Answer: No. ADR will set the attorney organization to the process record by using the credential submitted in the referral request.

## **Q: Can updates be submitted on the same referrals that were in DCS?**

Answer: Updates can be submitted on open referrals that were in DCS. ADR will contain converted processes that were open in DCS. Additionally the process based SubscriberIDs will be converted as well so any updated will require the same SubscriberID patterns to locate an existing process.

## **Q: Will ADR accept submission of Eviction and Closing referrals?**

Answer: No. Freddie Mac has elected to not track Eviction and Closings in ADR, so ADR does not expose interfaces to submit these referral types.

## **Q: How are steps updated in ADR?**

Answer: ImportForm. ADR has replaced “Milestones” with ImportForms.

# TROUBLESHOOTING ERRORS

## Error: You don't have permissions to the 'LoanInsert' function.

Explanation: This error occurs when attempting to pass in a Freddie Mac Loan Number (<Loan> Node) that does not exist in the system. You may only add cases on Loans that are already present in ADR.

## Rule Exception: Foreclosure cannot be inserted without Assigned Organization

Explanation: This error will occur under one of three conditions:

1. Your integration account is not associated with any Organizations
2. You are attempting to create a case for a Loan where the Property's State is not covered by your firm's Jurisdiction(s)
  1. If your integration account is associated with multiple Organizations, and one of the Organization's Jurisdiction covers the Property's State, the system may have attempted to bind the wrong Organization to the case. A subsequent attempt to submit the case should bind the proper Organization to the case
3. You are attempting to update a case using a SubscriberID that does not yet exist, however the Foreclosure case is already present in the system
  1. This condition typically occurs when using any operation other than the Foreclosure operation, and often times is a result of a firm adding new states to their list of jurisdictions. Please contact [adr.support@quandis.com](mailto:adr.support@quandis.com) to determine if this is the condition you are facing, and perform a backfill of SubscriberIDs for all applicable jurisdictions, if necessary.

## Rule Exception: There is currently an active Foreclosure for this Loan and your account is not configured to add one

Explanation: The ADR system only allows one active Foreclosure case per Loan. Your firm or another firm already has an active case on this Loan, and it will need to be closed out prior to adding your new case. If the case is assigned to your firm, there may be an issue with your SubscriberID mismatching the SubscriberID associated with the existing case. Please make sure this value did not change between submissions.

## Rule Exception: A (foreclosure/bankruptcy) process cannot be opened on a loan that is archived, closed or in REO.

Explanation: Loans that are no longer in Freddie Mac's portfolio (Archived or Closed) and those that have been sold and are now in REO do not allow Foreclosure and Bankruptcy Cases to be added. Existing Cases can be updated

using the ForeclosureUpdate, MFRUpdate, POCUpdate, ImportForm, Message and Document Operations. If you feel this exception was thrown in error, please contact Freddie Mac.

**Rule Exception: Start Date must be specified when creating a case**

Explanation: You must supply a Start Date (DateOpened) when inserting new cases. This should get caught at the schema level when using the Foreclosure operation, however, the ForeclosureUpdate operation does not require it at the schema level, and if the case does not already exist, the system will attempt to insert a new case. Switch to the Foreclosure operation, and include the DateOpened field.

**Rule Exception: Task Completion dates cannot be changed once already set**

Explanation: This error is informing the sender that the Task (ImportForm) they are attempting to complete was previously completed, using a different date than the current submission. The system does not allow Task Completion dates to be altered.

**Rule Exception: Tasks cannot be completed using a date prior to the previous task's completion date**

Explanation: Milestones (Tasks) must be completed in order. Once a Task is completed, if you attempt to complete the following Task with an earlier completion date, the system will throw this error.

**Rule Exception: Case status cannot be updated once the case is already closed**

Explanation: The SubscriberID being passed in is associated with a case that is closed. A new SubscriberID will need to be generated for the new case.

\*If a new SubscriberID cannot be generated, the existing case's SubscriberID will need to be modified. Please contact [adr.support@quandis.com](mailto:adr.support@quandis.com) for assistance.

**Rule Exception: In order to close a case, the Status must be 'Closed' AND a Removal Date must be entered**

Explanation: This error is informing the sender that they are attempting to close a Bankruptcy (MFR/POC) case and one of these conditions is present:

- A Status node was supplied, with a value of "Closed", and a DateClosed (AKA "Removal Date") node and value were not supplied
- A DateClosed (AKA "Removal Date") and value were provided, but the Status node was omitted, OR a Status other than "Closed" was supplied within the Status node

**Rule Exception: Opening Bid Amount must be set when completing task**

Explanation: A value is required in the Foreclosure\_BidAtSale\_BidOpening field when completing the Foreclosure Sale Held Task.

**Rule Exception: Credit Bid Amount must be set when completing task**



Explanation: A value is required in the Foreclosure\_BidAtSale\_BidMax field when completing the Foreclosure Sale Held Task.

**Rule Exception: Credit Bid Due must be set when completing task**

Explanation: A value is required in the Foreclosure\_BidAtSale\_BidDue field when completing the Foreclosure Sale Held Task.

---

# [ ] APPENDIX F: ADR CERTIFICATION CHECKLIST

ADR certification process in which integrators must successfully complete before they are allowed submit data to the ADR production environment. Certification is obtained by demonstrating the ability to invoke various ADR operations that simulate realistic submission scenarios. The following checklist can be used to prepare for certification testing.

File Type	Operation	Loan Number	Pass / Fail
Foreclosure	New Referral		
	Update Foreclosure		
	Complete Import Form		
	Post a Message		
	Upload a Document		
Foreclosure	Complete all Import Forms for State		
	Add a Decision Delay		

	Complete Delay		
	Update Ledger		
	Close File		
POC	New Referral		
	Update POC		
	Post a Message		
	Upload a Document		
	Complete an Import Form		
	Add a Decision Delay		
	Complete Delay		
	Complete Remaining Import Forms		
	Update Ledger		
	Close File		
MFR	New Referral		
	Update MFR		
	Upload a Document		
	Complete an Import Form		
	Add a Decision Delay		

	Complete Delay		
	Post a Message		
	Complete Remaining Import Forms		
	Update Ledger		
	Close File		

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# [ ] APPENDIX G: REQUIRED FORECLOSURE DOCUMENTS

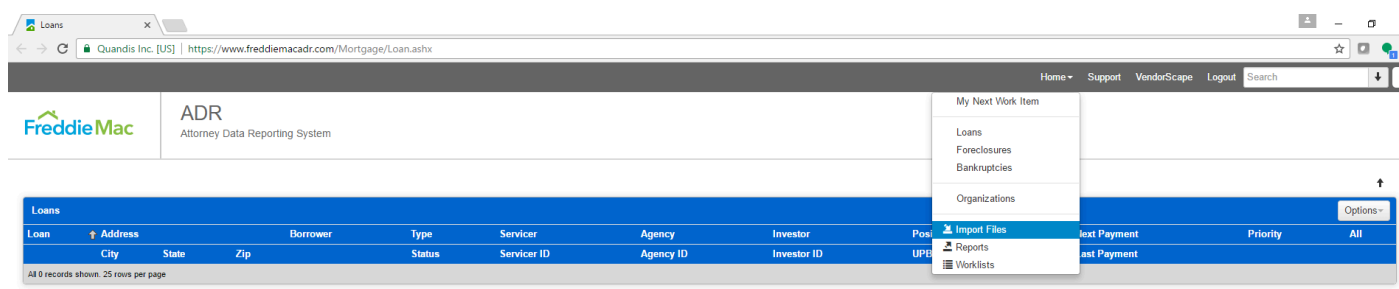
Foreclosure Document Requirements change from time-to-time. For the most current list required in your state, please reference the Required Documents tab of the [ADR Support Page](#) [<https://www.freddiemacadr.com/Theme.ashx/Render?Transform=Templates/Support.ADR.xslt>] (login required). For the most current list pending deployment to PROD, please reference the Required Documents tab of the [UAT ADR Support Page](#) [<https://uatadr.quandis.net/Theme.ashx/Render?Transform=Templates/Support.ADR.xslt>] (login also required)

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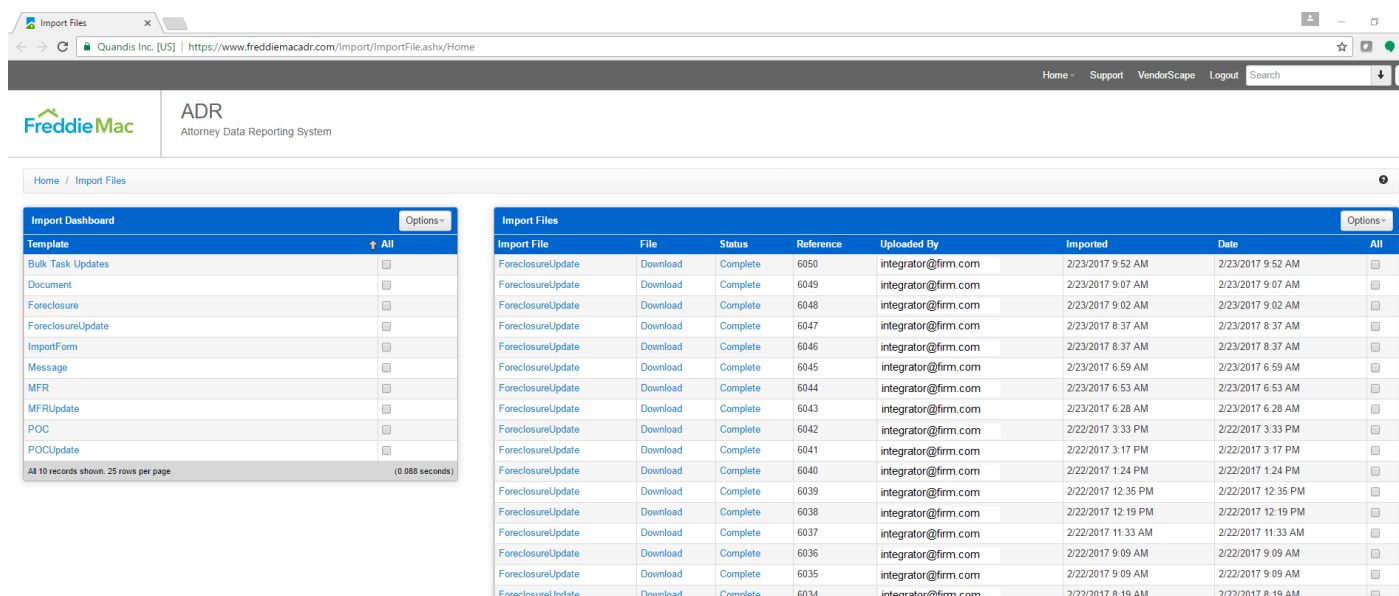
# [ ] APPENDIX H: IMPORT DASHBOARD

The ADR Import Dashboard is a tool available on the ADR website which allows integrators to monitor updates posted using the API. This is very useful tool for viewing or reconciling import data. The dashboard can be accessed

by clicking the “Dashboards” main menu item, and then choosing “Import Data”.



The Import Dashboard on the left shows all templates the user has access to. Users can click on the Template on the left and the result pane will refresh on the right with imports based on the selected template.



The result pane columns can be sorted ascending or descending by clicking on the column header. The options drop down to the right allows for quick filtering:

- Filters
  - Active – Imports submitted in the last 7 days
  - Success – Imports with no errors. If chosen, ensure Error is unchecked.

- Error – Imports that contain at least one error. If chosen, ensure Success is unchecked.
  - Complete – Imports that are complete. Used for asynchronous imports.
- 

## Smart Search

The upper right hand contains a text box with the label “Search”. This is the smart search box. This is the fastest way to conduct a search for an import. Possible submission values:

- ImportFileID – Value returned in the “ID” attribute in the ImportResults tag. This is also referred to as ImportFileID.
- External Reference – value of “Reference” attribute of the ImportCollection tag when import is submitted

## Search Dashboard

By clicking on the down arrow on the right hand side of the Smart Search text box, you will expose a modal labeled “Search Imports”.

Freddie Mac ADR Attorney Data Reporting System

Search Imports

Template: Foreclosure

ID:

External Reference:

Uploaded By: integrator@testattorney.com

Date Range: 7/25/2013 - 8/1/2013

Filters: ☒ Success ☐ Error ☐ Complete ☐ Queued

Import File	File	Status	Reference	Uploaded By	Imported
Foreclosure	Download	Complete	1339924	integrator@kasslaw.com	8/1/2013 4:14 PM
Foreclosure	Download	Complete	57	integrator@mccallaraymer.com	8/1/2013 2:41 PM
Foreclosure	Download	Complete	F13012166	integrator@defaultlawfl.com	8/1/2013 2:39 PM
Foreclosure	Download	Complete	57	integrator@mccallaraymer.com	8/1/2013 2:37 PM
Foreclosure	Download	Complete	1339931	integrator@kasslaw.com	8/1/2013 2:34 PM
Foreclosure	Download	Complete	1339930	integrator@kasslaw.com	8/1/2013 2:34 PM
Foreclosure	Download	Complete	1339926	integrator@kasslaw.com	8/1/2013 2:34 PM
Foreclosure	Download	Complete	57	integrator@mccallaraymer.com	8/1/2013 2:32 PM
Foreclosure	Download	Complete	57	integrator@mccallaraymer.com	8/1/2013 2:27 PM
Foreclosure	Download	Complete	57	integrator@mccallaraymer.com	8/1/2013 2:23 PM
Foreclosure	Download	Complete	56	integrator@mccallaraymer.com	8/1/2013 2:23 PM
Foreclosure	Download	Complete	54	integrator@mccallaraymer.com	8/1/2013 2:23 PM
Foreclosure	Download	Complete	53	integrator@mccallaraymer.com	8/1/2013 2:23 PM
Foreclosure	Download	Complete	52	integrator@mccallaraymer.com	8/1/2013 2:23 PM
Foreclosure	Download	Complete	51	integrator@mccallaraymer.com	8/1/2013 2:23 PM

This modal allows additional search filtering. The search filters include:

- Template – Import File Template submitted
- ID – Value returned in the “ID” attribute in the ImportResults tag. This is also referred to as ImportFileID.
- External Reference – value of “Reference” attribute of the ImportCollection tag when import is submitted
- Uploaded By – available list of accounts who submitted imports
- Date Range
  - From Date
  - To Date – Ensure this value includes the To Date plus one additional day
- Filters
  - Success – Imports with no errors. If chosen, ensure Error is unchecked.
  - Error – Imports that contain at least one error. If chosen, ensure Success is unchecked.
  - Complete – Imports that are complete. Used for asynchronous imports.
  - Queued – Imports that are queued to process. Used for asynchronous imports.

# Viewing Import Records

From the results pane a user can click on the following links per item:

- Import File – This will direct them to view the Import File Summary
- Download – This will allow the user to view the Xml that was submitted
- Status – This will expose summary statistics and render a link to download and Xml version of the Import Results. This Xml format is the same format that was returned by the interface upon submission

## Import File Summary

This is the summary view that allows individual viewing of an import. This view will provide the same information as the search result pane along with additional information.

The screenshot displays the ADR Attorney Data Reporting System interface. The top navigation bar includes links for Dashboards, Worklists, Contacts, Design, Support, and Logout. The main content area is titled 'Import Data / MFR' and features a summary of the import process. A message indicates that records were skipped during the import. The 'Import File Summary' section provides details about the import file, template, type, request file, results file, company, external reference, and upload information. Below this, the 'Transactions' section shows a table of import queue items, and the 'Import Activity' section shows a table of import actions.

Summary

Transactions

Import Log

Miscellaneous

Dashboards / Import Data / MFR

Records were skipped with this import. See the Activity Log for more details.

**Import File Summary** Options

Import File:	MFR	Status:	Complete
Template:	MFR	Records Affected:	imported, 1 skipped, and 0 warnings.
Type:		Import Start:	6/7/2013 3:26 PM
Request File:	7f574b09-afe8-46f6-9475-48bb0e5d72a4.xml	Import Complete:	6/7/2013 3:26 PM
Results File:	<a href="#">Download</a>	Validation Start:	
Company:		Validation Complete:	
External Reference:	abc	Expiration Date:	
Uploaded By:	integrator@testattorney.com		

**Transactions** Options

Import File Queue	Status	Class Name	Operation	Object	Object ID	Queued Date	Started	Completed	All
All 0 records shown. (3.95 seconds)									

**Import Activity** Options

Action	Status	Table	Identity	Reference	All
Insert	Success	Contact	5206367		<a href="#">✎</a> <input type="checkbox"/>
mscorlib	Error	Bankruptcy			<a href="#">✎</a> <input type="checkbox"/>
All 2 records shown. (3.92 seconds)					

The Import File Summary is broken up into 3 sections:

- Summary – Display summary information on the import and allows download of request and result data along with statistics

- Transactions – Currently not applicable for ADR
- Import Activity – Contains individual result information about records that were part of the import. This includes:
  - Status – Success or Error
  - TableName – ADR table name
  - Identify – Primary Key Identifier of record affected
  - Reference – Attorney supplied reference number
    - Note this contains a link to raw Xml or stack trace information

# [ ] APPENDIX I: ATTACHMENT TEMPLATES

The following is a list of the available attachment templates, along with the parent object, name and repeatability.

- Parent: This is the object the template applies to
- Name: The name of the attachment template
- Repeatability: This defines the behavior of the template in relation to its parent.
  - One per parent: Only one attachment allowed per parent, regardless of status
  - Many per parent: Many attachments allowed per parent, regardless of status
  - One open per parent: Only one open attachment allowed per parent.

Parent	Attachment Name	Repeatability
Foreclosure	Act Letters	One per parent
Foreclosure	Affidavit	One per parent
Foreclosure	Application	One per parent



Foreclosure	Appraisal	One per parent
Foreclosure	ARM Rider	One per parent
Foreclosure	Assignment	One per parent
Foreclosure	Assignment (unrecorded)	One per parent
Foreclosure	Bankruptcy Plan	One per parent
Foreclosure	Bid Form	Many per parent
Foreclosure	BPO	One per parent
Foreclosure	Breach Letter	One per parent
Foreclosure	Certificate of Attachment	One per parent
Foreclosure	Certificate of Title (mh)	One per parent
Foreclosure	Certificate of Sale (mh)	One per parent
Foreclosure	Charge Off Form	One per parent
Foreclosure	Condo Rider	One per parent
Foreclosure	Consent Orders	One per parent
Foreclosure	Contract for Deed	One per parent
Foreclosure	Copy of Assignment of Lease	One per parent
Foreclosure	Copy of Proprietary Lease	One per parent
Foreclosure	Copy of Stock Certificate	One per parent
Foreclosure	Copy of Stock Power	One per parent
Foreclosure	Copy of UCC-1	One per parent

Foreclosure	Credit Bureau	One per parent
Foreclosure	Credit Life Insurance	One per parent
Foreclosure	Credit Report	One per parent
Foreclosure	Current Title Commitment	One per parent
Foreclosure	Customer Correspondence	One per parent
Foreclosure	Deed of Trust	One per parent
Foreclosure	Demand Letter	One per parent
Foreclosure	Default Payoffs	One per parent
Foreclosure	Derogatory Credit Explanation	One per parent
Foreclosure	Disclosure of Loan Terms	One per parent
Foreclosure	DIL Authorization	One per parent
Foreclosure	Environmental Hazards	One per parent
Foreclosure	EPA Correspondence	One per parent
Foreclosure	Extension Agreement	One per parent
Foreclosure	FC Final Deed	One per parent
Foreclosure	FHA Eviction Package	One per parent
Foreclosure	FHA Post Sale Package	One per parent
Foreclosure	FHA Title Package	One per parent
Foreclosure	Flood Insurance Certification	One per parent
Foreclosure	Forbearance Agreement	One per parent

Foreclosure	Foreclosure complaints	One per parent
Foreclosure	Foreclosure Judgments	One per parent
Foreclosure	Foreclosure/Sheriff's Deed	One per parent
Foreclosure	Good Faith Estimate	One per parent
Foreclosure	Hardship Letter	One per parent
Foreclosure	HAMP Letter	One per parent
Foreclosure	Home Equity Order	One per parent
Foreclosure	HUD	One per parent
Foreclosure	HUD-1	One per parent
Foreclosure	Loan Application	One per parent
Foreclosure	Loan Approval	One per parent
Foreclosure	Lost Assignment Affidavit	One per parent
Foreclosure	Lost Note Affidavit	One per parent
Foreclosure	Mechanic's Lien Affidavit	One per parent
Foreclosure	Misc Rider	One per parent
Foreclosure	Mobile-Home Title	One per parent
Foreclosure	Modification	One per parent
Foreclosure	Mortgage	One per parent
Foreclosure	Mortgage Insuring Certificate	One per parent
Foreclosure	Mortgage Rider	One per parent

Foreclosure	Motion for Relief Order	One per parent
Foreclosure	Name Affidavit	One per parent
Foreclosure	Non Sufficient Fund	One per parent
Foreclosure	Note	One per parent
Foreclosure	Note Rider	One per parent
Foreclosure	Notice of BK Filing	One per parent
Foreclosure	Notice of Default Complaint	One per parent
Foreclosure	Notice of Sale	One per parent
Foreclosure	Other	One per parent
Foreclosure	Payment History	One per parent
Foreclosure	Payoff Statements	One per parent
Foreclosure	Power of Attorney	One per parent
Foreclosure	Property Inspection	One per parent
Foreclosure	Property Insurance Policy	One per parent
Foreclosure	PUD Rider	One per parent
Foreclosure	Purchase Sales Contract	One per parent
Foreclosure	Reaffirmation	One per parent
Foreclosure	Recorded Security Instrument	One per parent
Foreclosure	Rehabilitation Loan Rider	One per parent
Foreclosure	Release of Lien	One per parent

Foreclosure	Release/Dismissal of Tax Suit	One per parent
Foreclosure	Returned POCs	One per parent
Foreclosure	Right to Cancel	One per parent
Foreclosure	Security Deed	One per parent
Foreclosure	Sheriff's Sale Notice	One per parent
Foreclosure	Sheriff's Deed	One per parent
Foreclosure	Stipulated Plan	One per parent
Foreclosure	Substitute Trustee's Deed	One per parent
Foreclosure	Substitution of Trustee	One per parent
Foreclosure	Summary Sheet	One per parent
Foreclosure	Summon & Complaint Docs	One per parent
Foreclosure	Survey	One per parent
Foreclosure	Title Commitment	One per parent
Foreclosure	Title Indemnity	One per parent
Foreclosure	Title Policy	One per parent
Foreclosure	Title Search	One per parent
Foreclosure	Transfer of Service Disclosure	One per parent
Foreclosure	Truth in Lending	One per parent
Foreclosure	Underwriter Approval Letter	One per parent
Foreclosure	Unrecorded Mortgage	One per parent

Foreclosure	Warranty Deed	One per parent
Foreclosure	Reinstatement Quote	Many per parent
Foreclosure	Payoff Quote	Many per parent
Report	Crystal Report1	One per parent
Report	Excel Report1	One per parent
ImportFile	Bulk Import	Many per parent
Report	Timeline Summary	Many per parent
Report	Hold	Many per parent
Report	Timeline Completion	Many per parent
Report	Timeline Exception	Many per parent
Report	Litigation Detail	Many per parent
Organization	LMWS Attorney Firm File	Many per parent
Organization	LMWS Foreclosure	Many per parent
Organization	LMWS Bankruptcy MFR	Many per parent
Organization	LMWS Backruptcy POC	Many per parent
Foreclosure	MultipleTest	Many per parent
Foreclosure	Deficiency Judgment	One open per parent
Bankruptcy	BK Document	Many per parent
Foreclosure	FC Document	Many per parent
Attachment	LDI Response File	One per parent

Foreclosure	FC Bidding Instructions	One per parent
Foreclosure	Certificate of Purchase	One per parent
Foreclosure	Notice of Intent Seek Def	One per parent
Foreclosure	Affidavit of Indebtedness	One per parent
Foreclosure	Order Approving FC Sale	One per parent
Foreclosure	Affidavit of Service	Many per parent
Foreclosure	Assignment of Judgement	One per parent
Contact	Spec Test – hli54ks5	Many per parent
Report	Settlement	Many per parent
Report	Foreclosure Document Deficiency	Many per parent
Report	SFDML Litigation	Many per parent
Report	Inventory	Many per parent
Report	Summary Level	Many per parent
MessageTemplate	Blast Email Attachments	Many per parent
Report	Postponement	Many per parent
Foreclosure	Upload Test	Many per parent
Report	Attorney Data Management	Many per parent
Report	Litigation Hold Reconciliation	Many per parent

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