



ADR

ATTORNEY DATA REPORTING

ATTORNEY USER GUIDE

1 DOCUMENT REVISION HISTORY

Revision Date	System or Process Update	Section Updated
06-18-2015		Initial Creation
02-10-2017	Added new Foreclosure and Bankruptcy Case Closure step to all State Workflows	17 (State Workflows)
03-01-2017	Removed Re-Certification Process Instructions	1.8
10-03-2018	Updated all screenshots for ADR updates and added new section for Direct Title Rollout	New section '12 Title Home Page'
11-02-2018	Updated Title Data Report Section, 'DateClosed' field updated to 'DateReceived' and 'DateCancelled' added	16.3.10 Title Data Report

03-20-2019	Updated Title Cancellation process Added Beneficiary Check Document Retrieval process Added Title Update Request process	12.3 Title Order Cancellation 12.5.1 Beneficiary Check Document Retrieval 12.6 Title Update Requests
06-25-2019	General verbiage clean-up Added Title Order Inquiries	3.2, 12, 12.1, 12.4 12.7 Title Order Inquiries
06-08-2023	Removed deprecated Report	16

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Some older versions of browsers may have compatibility issues with the ADR system. As you navigate through the system, if you encounter issues such as pages not displaying properly, misaligned images, or trouble with uploading documents, please add www.freddiemacadr.com as a trusted site in your browser's settings, and this should correct your issues.

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0 LOCATING A LOAN

To locate a loan, simply click on “Home” or hover over “Home” and select “Loans” from the dropdown. This will bring you to the Loan Search Dashboard, which will allow you to enter in the 9-digit Freddie Mac loan number in the search field, as highlighted below.

NOTE: The search field will pertain to the specific page that you are on. For example, if you hover over “Home” and select “Foreclosures”, then the search field will return results related to any foreclosure number you enter. If you choose “Bankruptcies” from the dropdown instead of “Foreclosures”, then your search results will return bankruptcy results instead.

Home / Loans

Loans

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	UPB Amount	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment	
All 0 records shown. 25 rows per page										

Once you have provided the 9-digit Freddie Mac loan number in the search field, hit your enter key and your results will be provided in the following screen.

1 MANAGING USERS

This section will guide the security administrator on how to Add Users, Add Roles to a User, Remove Roles from a User, De-Activate a User, Unlock a User, Reset a User's Password, and Add a User to Multiple Organizations.

A user's ability to view and or edit fields in the system is based on their role.

There are 2 roles: Security Administrator and Attorney.

The Security Administrator Role is the only role that manages users in the system.

The Attorney role is reserved for users who need to view loans associated with their company in the ADR system.

1.1 ADDING USERS

1. Select Organizations from the Contacts drop-down.

Home / Loans

Loans

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	UPB Amount	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	Last Payment		
All 0 records shown. 25 rows per page										

My Next Work Item

- Loans
- Foreclosures
- Bankruptcies
- Titles
- Contacts
- Import Files
- Reports
- Worklists

Organizations

2. Click on the Organization name hyperlink. If your company has more than one organization, you will have several listed. You are directed to the Organization Summary page.

Home / Contacts / Organizations

Organizations

Organization	Address	Phone	Type	Labels	All
City	State	Postal Code	Email	Status	
Marinosci Law Group, PC - CT	100 Great Meadow Road, Suite 501 Weathersfield, CT 06109	(401)234-9119 jbourdeau@mlg-defaultlaw.com	Attorney ANR Firm	LMWS ID Attorney Bankruptcy Organizations Client Foreclosure Organizations	
6-28 UAT Test #XX - CT	6-28 UAT Test #13 6-28 UAT Test #13, CT 01313	(131)313-1313 mikeparks@mac.com	Attorney ANR Firm	LMWS ID Attorney Bankruptcy Organizations Client Foreclosure Organizations	
McCalla Raymer Pierce, LLC - GA	1544 Old Alabama Road Roswell, GA 30076	(678)281-6529 sre@mccallaraymer.com	Attorney ANR Firm	LMWS ID Attorney Bankruptcy Organizations Client Foreclosure Organizations	

3. Select the '+' symbol within the "Users" panel to add a New User.

Users

Users

User Name	Active	Email	Last Login	Roles	Labels
Name		Phone	Last Password		
All 0 records shown. 25 rows per page (0.017 seconds)					

New User

4. Enter the following fields within the Register Panel and select 'Register'

- First Name

- Last Name
- Email Address
- System Roles – Role to be granted access

First Name: Ashly

Last Name: Angle

Email: testangle@quandis.com

System Roles: Attorney
 Security Administrator

Labels:

Register

5. You are directed back to the Users panel

Users						
Users						
User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	Unconfirmed	test1234@quandis.com				<input checked="" type="checkbox"/>

All 1 records shown. 25 rows per page (0.019 seconds)

6. To activate the user, click in the user's row to highlight the row or check the box under the All column.

Users						
Users						
User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	Unconfirmed	test1234@quandis.com				<input checked="" type="checkbox"/>

All 1 records shown. 25 rows per page (0.019 seconds)

7. Select Activate Users from the Options drop-down menu.

Users

Users

User Name	Active	Email	Last Login	Roles
test1234@quandis.com	Unconfirmed	test1234@quandis.com		

Ledgers

Ledgers

Ledger	Parent	Type	Posted Date	Balance	Payee	Recipient
Template	Label	Status	Completed Date	Adjusted Balance	Account Number	

Import Files

Options: +, C, L, ...

Show All
Show Active
Show Inactive
Show Unconfirmed
Unlock Users
Send Password Reset
Confirm Accounts
Activate Users (highlighted)
Deactivate Users
Add Role
Remove Role
Grant Access
Revoke Access

8. Click 'Okay' in the Confirmation dialogue box. The user is activated. All active users will have a status of "Yes" in the corresponding "Active" column

Attorney Data Reporting

Contacts / Organizations / Relin, Goldstein & Crane

Relin, Goldstein & Crane

Company Name:	Relin, Goldstein & Crane	Address:	1800 First Federal Plaza
Primary Contact:	Joe Relin	Tester	
Phone:	(333)333-3333	U	
Email:	jrelin@quandis.com	closure Organizations (Relin, Goldstein & Crane)	
Status:			
Type:			

Confirmation

Activate these accounts?

Okay Cancel

Users (People)

Options: +, C, L, ...

Users

User Name	Active	Email	Last Login	Roles	Labels	All
test1234@quandis.com	Yes	test1234@quandis.com				

All 1 records shown. 25 rows per page (0.06 seconds)

9. Send the user a password reset email by selecting Send Password Reset from the Options drop-down.

Users

User Name	Active	Email	Last Login	Roles
Name		Phone	Last Password	
test1234@quandis.com	Yes	test1234@quandis.com		
Angle, Ashly				

All 1 records shown, 25 rows per page

Ledgers Payment Methods

Ledgers

Ledger	Parent	Type	Posted Date	Balance	Payee	Recipient
Template	Label	Status	Completed Date	Adjusted Balance	Account Number	

All 0 records shown, 25 rows per page

Import Files

Unlock Users

- Show All
- Show Active
- Show Inactive
- Show Unconfirmed
- seconds

Send Password Reset

- Confirm Accounts
- Activate Users
- Deactivate Users
- ...
- seconds

Send Password Reset

- + Add Role
- Remove Role
- + Grant Access
- Revoke Access

10. Click 'Okay' in the Confirmation dialogue box.

FreddieMac ADR Attorney Data Reporting System

Home / Contacts / Organizations / Summary

Organization Summary

McCabe Weisberg & Conway, PC - MD

Organization: McCabe Weisberg & Conway, PC - MD

Template:

Edit

Confirmation

Send password reset instructions to these accounts?

Okay Cancel

11. The user will receive an email with instructions on how to set their password. Below is a sample of the email that will be received:

Password Reset Email

Quandis Business Objects

to sbob ▾

A password reset request has been issued for your account.

Copy the URL below and paste it into your browser to change your password.

<https://devadr.quandis.net/Security/Login.ashx/VerifyAccount?LoginGuid=6a90acf4-92f4-47ad-b968-48525f1b75f0>

Thank you.

1.2 ADDING A ROLE TO A USER

1. Search for the user that requires a role to be added.
2. Click into the row to highlight the user or check the box in the All column.

Users						
Users						
User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com	Yes	test1234@quandis.com				<input checked="" type="checkbox"/>
Angle, Ashly						

3. Select Add Role from the Options drop-down menu.

Users						
Users						
User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com	Yes	test1234@quandis.com				<input checked="" type="checkbox"/>
Angle, Ashly						

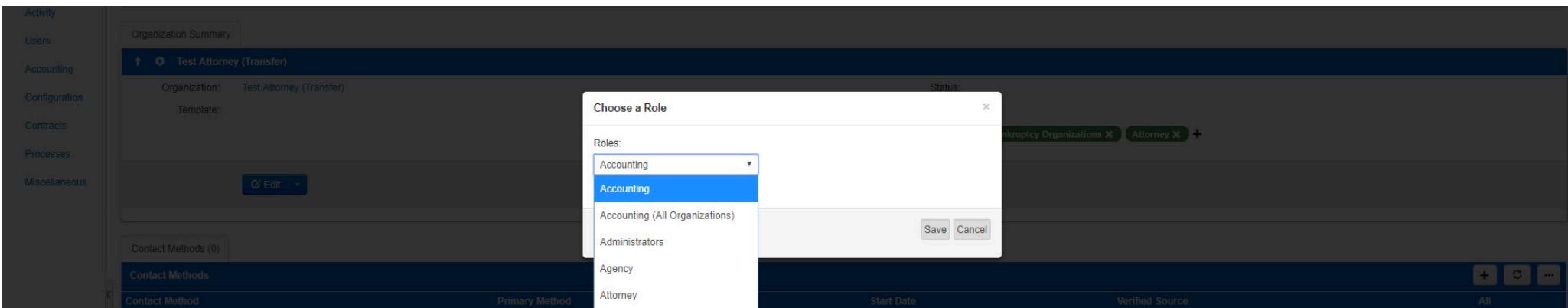
All 1 records shown. 25 rows per page (0.142 seconds)

Ledgers						
Payment Methods						
Ledgers						
Ledger	Parent	Type	Posted Date	Balance	Payee	Recipient
Template	Label	Status	Completed Date	Adjusted Balance	Account Number	

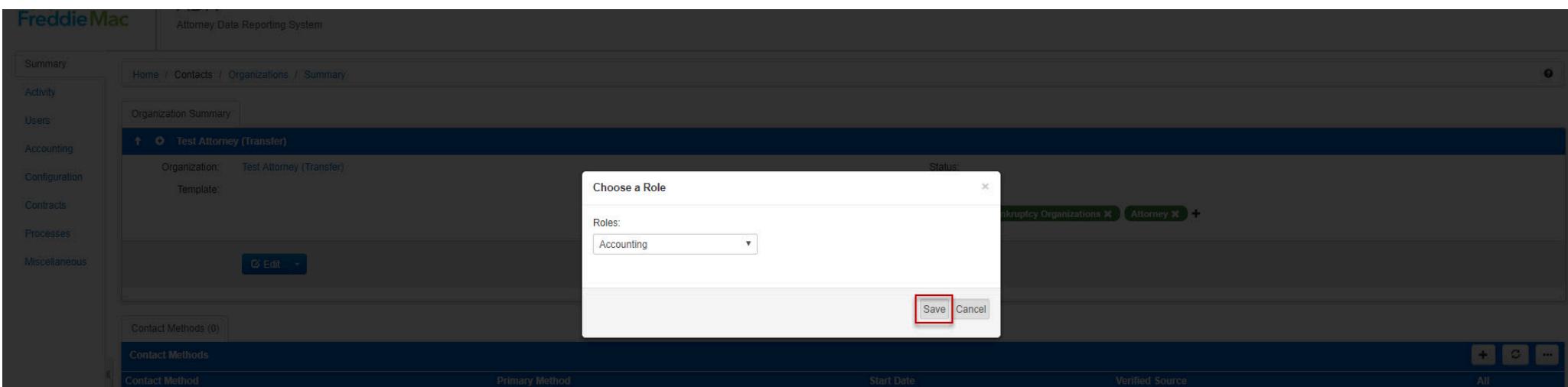
All 0 records shown. 25 rows per page (0.142 seconds)

- Show All
- Show Active
- Show Inactive
- Show Unconfirmed
-
- Unlock Users
- Send Password Reset
- Confirm Accounts
- Activate Users
- Deactivate Users
-
- + Add Role**
- Remove Role**

4. Select the role to be added from the Role drop-down menu. In this example, the role of manager is added.



5. Click Save.



6. The role has been added. In this example, the Accounting role was added to the user.

Users		Active		Email	Last Login	Roles	Labels	All
Name	Phone	Last Password						
test1234@quandis.com Angle, Ashly	Yes	test1234@quandis.com				Accounting		

1.2.1 ROLE DEFINITIONS

	Security Administrator	Administrator	Agency	Attorney	Processor	Manager	View Only
Edit Organization		X					
Manage Work Lists		X				X	
Alter Attorney Information		X					
View Dashboard	X	X	All Orders	Assigned orders	Assigned orders	Assigned orders	Assigned orders
Add Users	X	X	Internal Users				
Reset Passwords	X	X	X	Own Password	Own Password	Own Password	Own Password
Inactivate a User	X	X	Internal Users				
Add/Remove Roles	X	X	Internal Users				
Add Documents to the Organization	X	X	X				
Generate Reports		X	X	X		X	
FC Summary		X	X	X	X	X	
Complete Tasks		X		X	X	X	
Complete Total Debt		X		X	X	X	
Complete Fees/Costs		X		X	X	X	
Complete Bids		X		X	X	X	

Complete Reinstatement		X		X	X	X	
Complete Pay off							
BK Summary		X		X	X	X	
Configuration Templates	X	X		X	X	X	
Create Orders		X		X	X	X	
Create Messages		X	X	X	X	X	
Upload/Delete Documents user uploaded		X	X	X	X	X	

1.3 REMOVE A ROLE

1. Search for the user that requires a role to be removed.
2. Click into the row to highlight the user or check the box in the All column.

Users							
User Name		Active	Email	Last Login	Roles	Labels	All
Name	Phone			Last Password			
test1234@quandis.com	Yes	test1234@quandis.com			Accounting		<input checked="" type="checkbox"/>
Angle, Ashly							

All 1 records shown. 25 rows per page (0.063 seconds)

3. Select Remove Role from the Options drop-down.

Users

User Name ↑ Active

Name Email

test1234@quandis.com
Angle, Ashly Phone

All 1 records shown. 25 rows per page

Ledgers Payment Methods

Ledgers

Ledger Parent

Template Label

Type Status

Posted Date Completed Date

Balance Payee

Adjusted Balance Recipient

Account Number

All 0 records shown. 25 rows per page

+ Show All
Show Active
Show Inactive
Show Unconfirmed
Unlock Users
Send Password Reset
Confirm Accounts
Activate Users
Deactivate Users
+ Add Role
- Remove Role

4. Select a role to be removed from the role drop-down menu. In this example, the role of Manager is going to be removed.

Choose a Role

Roles:

Accounting

Accounting

Accounting (All Organizations)

Administrators

Agency

Attorney

Save Cancel

5. Click Save.

Choose a Role

Roles:

Accounting

Save Cancel

6. The role has been removed.

Users						
User Name	↑ Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	Yes	test1234@quandis.com				

All 1 records shown. 25 rows per page (0.061 seconds)

1.4 DEACTIVATE A USER

1. Search for the user that needs to be deactivated. (More than one user can be deactivated at a time)
2. Click into the row to highlight the user.

Users						
User Name	↑ Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	Yes	test1234@quandis.com		Accounting		<input checked="" type="checkbox"/>

All 1 records shown. 25 rows per page (0.063 seconds)

3. Select Deactivate Users from the Options drop-down.

Users						
User Name	↑ Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	Yes	test1234@quandis.com				

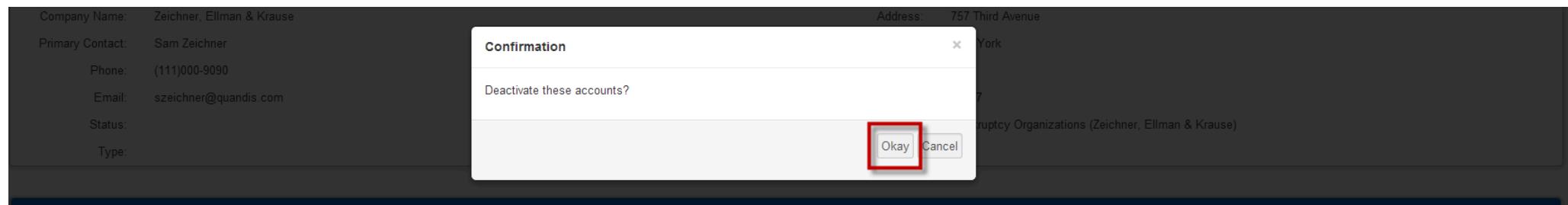
All 1 records shown. 25 rows per page (0.063 seconds)

Ledgers
Payment Methods

Ledgers						
Ledger	Parent	Type	Posted Date	Balance	Payee	Recipient

- Show All
- Show Active
- Show Inactive
- Show Unconfirmed
-
- Unlock Users
- Send Password Reset
- Confirm Accounts
- Activate Users
-
- Deactivate Users

4. Click 'Okay' in the Confirmation dialogue box.



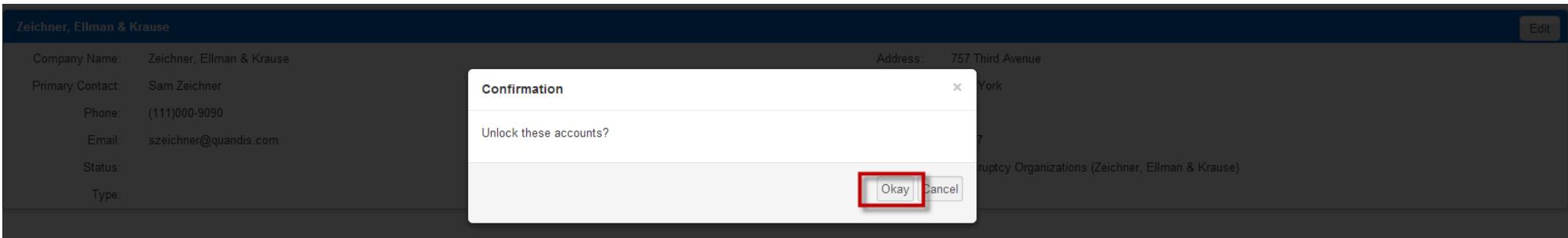
5. The Active column is No.

1.5 UNLOCK A USER

1. Search for the user that needs to be unlocked. (More than one user can be unlocked at a time)
2. Click into the row to highlight the user.

3. Select Unlock Users from the Options drop-down.

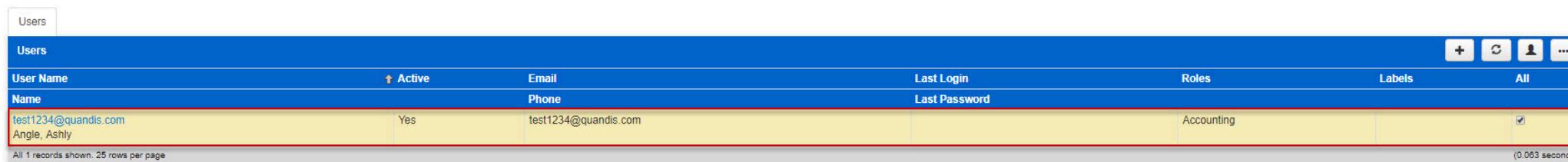
4. Click 'Okay' in the confirmation dialogue box.



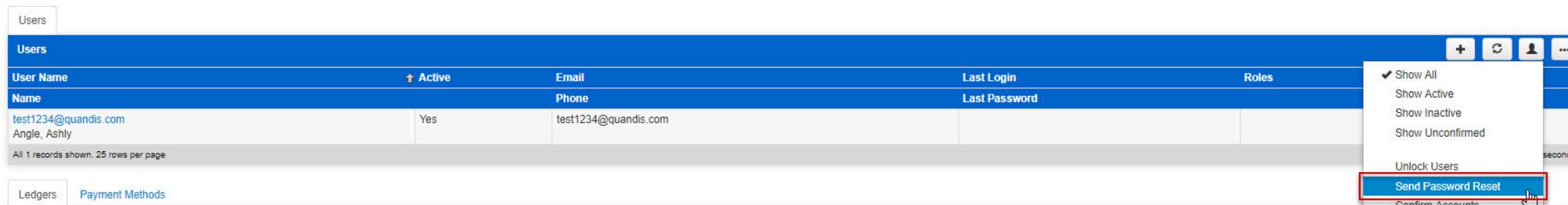
5. The user has been unlocked.

1.6 RESET A USER PASSWORD

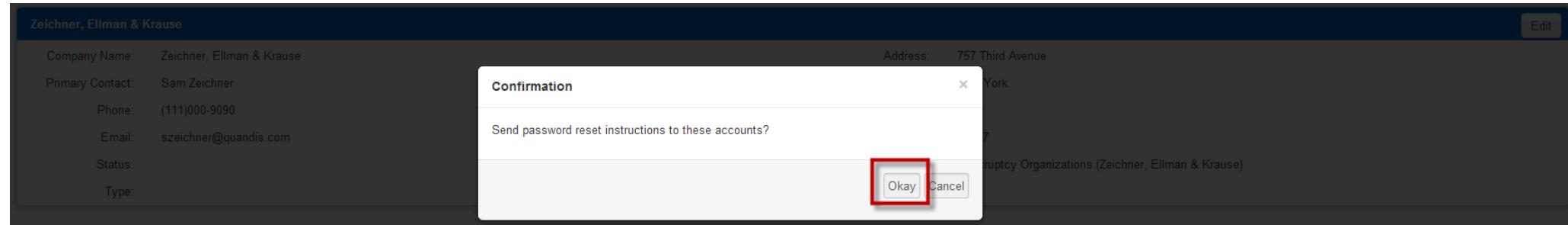
1. Search for the user that requires a password reset. (More than one user can have their password reset at a time)
2. Click into the row or its checkbox to highlight the user.



3. Select Send Password Reset from the Options drop-down.



4. Click 'Okay' in the Confirmation dialogue box.



5. The user is sent an email to reset password.

1.7 ADDING A USER TO MULTIPLE ORGANIZATIONS

1. If your law firm has several organizations because you do business in several states, you can provide users access to all organizations. In this example, the user ABah@mwc-law.com is a part of the McCabe Weisberg & Conway, PC – MD. Note that the state will be appended after the organization name (e.g. – MD).

User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
ABah@mwc-law.com Bah, Abiebatu	No	ABah@mwc-law.com	6/5/2018 5:52:56 AM 6/5/2018 5:53:07 AM	Attorney, Processor		<input type="checkbox"/>
ABahus@mwc-law.com Babus, Alexander	No	ABahus@mwc-law.com	9/13/2017 9:49:56 AM 9/13/2017 9:50:14 AM	Attorney, Processor		<input type="checkbox"/>
ABarrett@mwc-law.com Barrett, Ashley	Yes	ABarrett@mwc-law.com	9/28/2018 8:50:22 AM 9/4/2018 12:26:08 PM	Attorney, Manager, Processor		<input type="checkbox"/>

2. ABah@mwc-law.com is not a user for the McCabe Weisberg & Conway, PC in MD and requires access to the MD office.



Summary

Activity

Users

Accounting

Configuration

Contracts

Home / Contacts / Organizations / Summary



Organization Summary

McCabe Weisberg & Conway, PC - VA

Organization: McCabe Weisberg & Conway, PC - VA

Status: ANR Firm

Template:

Type: Attorney

Labels: LMWS ID Client Foreclosure Organizations Bankruptcy Organizations Attorney +

Edit

Users

ABah@mwc-law.com
is not listed under
the state of VA

Users

User

Name

Active

Email

Last Login

Roles

Labels All

Name

Phone

Last Password

ABarrett@mwc-law.com

Barrett, Ashley

Yes

ABarrett@mwc-law.com

9/28/2018 8:50:22 AM

9/4/2018 12:26:08 PM

Attorney, Manager, Processor



ACartledge@mwc-law.com

Cartledge, Alexis

Yes

ACartledge@mwc-law.com

9/5/2018 7:33:17 AM

9/5/2018 7:34:08 AM

Attorney, Processor



ADaily@mwc-law.com

Daily, Annie

Yes

ADaily@mwc-law.com

8/20/2018 5:38:24 AM

8/20/2018 5:39:42 AM

Attorney, Processor



3. Navigate to the organization the user should be granted access.

- Select 'Grant Access' under the Person Icon

Home Support VendorScape Logout Search 0

Freddie Mac ADR Attorney Data Reporting System

Users

Users

User Name	Active	Email	Last Login	Roles
Name		Phone	Last Password	
ABarrett@mwc-law.com	Yes	ABarrett@mwc-law.com	9/28/2018 8:50:22 AM 9/4/2018 12:26:08 PM	Attorney, Manager, Processor
Barrett, Ashley				
ACartledge@mwc-law.com	Yes	ACartledge@mwc-law.com	9/5/2018 7:33:17 AM 9/5/2018 7:34:08 AM	Attorney, Processor
Cartledge, Alexis				
ADaily@mwc-law.com	Yes	ADaily@mwc-law.com	8/20/2018 5:38:24 AM 8/20/2018 5:39:42 AM	Attorney, Processor
Daily, Annie				
ADong@mwc-law.com	Yes	ADong@mwc-law.com	10/3/2018 1:48:22 PM 6/28/2018 10:42:58 AM	Attorney, Processor, Security Administrator
Dong, Alyssa				
Agries-eley@mwc-law.com	No	Agries-eley@mwc-law.com	3/28/2018 8:47:30 AM 1/4/2018 1:02:57 PM	Attorney, Attorney, Attorney, Processor, Processor, Processor
Grimes-Eley, Ashley				
AHenderson@mwc-law.com	Yes	AHenderson@mwc-law.com	10/2/2018 1:21:56 PM 9/27/2018 7:26:32 AM	Attorney, Processor
Henderson, Anthony				
ARanieri@mwc-law.com	Yes	ARanieri@mwc-law.com	7/10/2018 6:12:49 AM 7/10/2018 6:13:09 AM	Attorney, Processor
Ranieri, Ann				
bharris@mwc-law.com	Yes	bharris@mwc-law.com	10/3/2018 9:10:49 AM 8/20/2018 7:24:10 AM	Attorney, Manager, Processor, Security Administrator
Horrie Brooks				

Show All **Show Active** **Show Inactive** **Show Unconfirmed** **All**

Unlock Users Send Password Reset Confirm Accounts Activate Users Deactivate Users

+ Add Role **- Remove Role** **+ Grant Access** **- Revoke Access**

4. The Grant Access dialogue box opens.

- Select the user that should be activated from the drop-down list
- Select 'Save'

Home Support VendorScape Logout Search 0

Freddie Mac ADR Attorney Data Reporting System

Summary

Contact Methods

Contact Method	Primary Method	Status	Start Date	Verified Source	All
Description			End Date	Verified Date	
dtheologou@mwc-law.com	Contract Email				
losullivan@mwc-law.com	Email				
dtheologou@mwc-law.com	Email				
(571)449-9358	Phone				
tfields@mwc-law.com	Tiffany Fields - Operations Manager email				
All 5 records shown. 25 rows per page					
bharris@mwc-law.com	Yes	bharris@mwc-law.com	10/3/2018 9:10:49 AM	Attorney, Manager, Processor, Security Administrator	

Grant Access

Person: **Select**

Select

ABah@mwc-law.com

ACartledge@mwc-law.com

ADaily@mwc-law.com

ADong@mwc-law.com

EBlood@mwc-law.com

Save Cancel

5. The user now has access to the additional organization. In this example, ABah@mwc-law.com was granted access for McCabe Weisber & Conway, PC in VA.

6. Only users that have the role of Security Administrator can complete the above.

2 ACCESSING THE SYSTEM

Please Note the system is compatible with the following internet browsers:

Internet Explorer 11

Google Chrome (Version 25+)

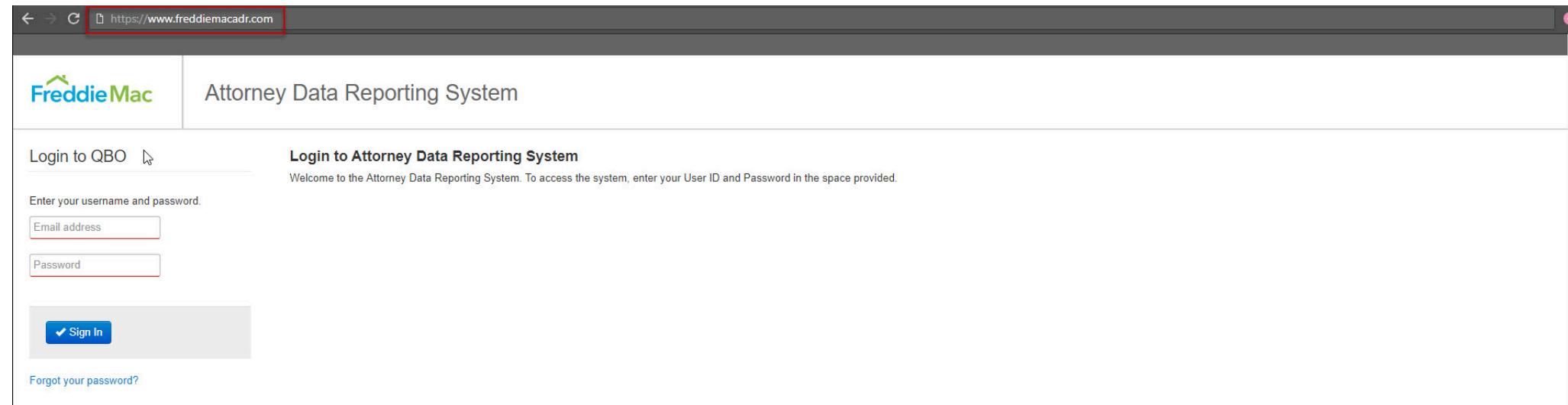
Firefox (Version 17+)

Safari (Version 5+)

Users that are not using one of the above compatible web browsers will receive an error message and be denied access to the ADR website

2.1 LOGGING INTO THE SYSTEM

1. Enter <https://freddiemacadr.com> in your address bar.



The screenshot shows a web browser window with the following details:

- Address Bar:** https://www.freddiemacadr.com
- Header:** Attorney Data Reporting System
- Left Sidebar:** Login to QBO
- Right Content Area:**
 - Section:** Login to Attorney Data Reporting System
 - Text:** Welcome to the Attorney Data Reporting System. To access the system, enter your User ID and Password in the space provided.
 - Form Fields:** Email address, Password
 - Buttons:** Sign In (with a checked checkbox), Forgot your password?

2. Enter the e-mail address, which is your user name, in the E-mail field

← → C https://www.freddiemacadr.com

Freddie Mac Attorney Data Reporting System

Login to QBO

Enter your username and password.

aangle@quandis.com

Password

[Forgot your password?](#)

Login to Attorney Data Reporting System

Welcome to the Attorney Data Reporting System. To access the system, enter your User ID and Password in the space provided.

3. Enter your password in the password field.

← → C https://www.freddiemacadr.com

Freddie Mac Attorney Data Reporting System

Login to QBO

Enter your username and password.

aangle@quandis.com

[Forgot your password?](#)

Login to Attorney Data Reporting System

Welcome to the Attorney Data Reporting System. To access the system, enter your User ID and Password in the space provided.

4. Click Sign In.

← → C https://www.freddiemacadr.com

Freddie Mac Attorney Data Reporting System

Login to QBO

Login to Attorney Data Reporting System

Welcome to the Attorney Data Reporting System. To access the system, enter your User ID and Password in the space provided.

Enter your username and password.

Sign In

[Forgot your password?](#)

5. You are directed to the Search Page.

Home Support VendorScape Logout Search

ADR
Attorney Data Reporting System

Loans

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment	
All 0 records shown. 25 rows per page										

2.2 RESETTING YOUR PASSWORD

1. A Security Administrator for your firm can send a Password Reset email to you (see Section 1.6), or you can click on the "Forgot your password?" Hyperlink.

← → C https://www.freddiemacadr.com 6

Freddie Mac Attorney Data Reporting System

Login to QBO

Login to Attorney Data Reporting System

Welcome to the Attorney Data Reporting System. To access the system, enter your User ID and Password in the space provided.

Enter your username and password.

✓ Sign In

[Forgot your password?](#)

2. You are directed to the Password reset page
3. Enter you email address in the email address field.

Attorney Data Reporting

Sign In Register [Forgot your password?](#)

Password Reset

Enter your email address.

✓ Reset **Cancel**

Password Reset Instructions

To reset your password follow the instructions below:

- Enter your email address in the text box
- Click the "Reset" button to send an email to the specified address
- Wait for the email to be delivered
- Follow the directions in the email to change your password

4. Click Reset
5. Whether you used the "Forgot your password?" link, or a Security Administrator initiated the Password Reset, you will receive an email with instructions on how to reset your password.

Password Reset Email



Quandis Business Objects

to sbob

A password reset request has been issued for your account.

Copy the URL below and paste it into your browser to change your password.

<https://devadr.quandis.net/Security/Login.ashx/VerifyAccount?LoginGuid=6a90acf4-92f4-47ad-b968-48525f1b75f0>

Thank you.

6. Passwords are case sensitive and must adhere to the following Freddie Mac security guidelines:

- 8 characters long
- At least one of the following special characters: ! @ # \$ % ^ & * ()
- At least one number
- At least one capital letter
- At least one lower case letter
- Your new password cannot match any of the previous 3 passwords

7. Users are required to reset their password every 90 days. Reminder notifications will be sent to the users prior to their passwords expiring. Should any user not reset their password prior to the 90-day expiration, their user account will be locked out. Upon their next attempt to login, they will be notified to contact their Security Administrator.

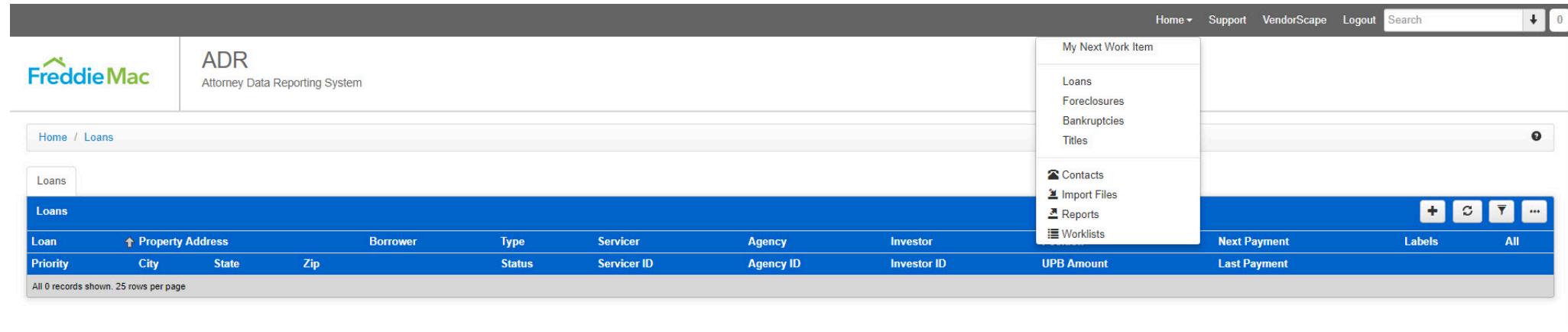
3 OPENING A FORECLOSURE

All fields underlined in red are require fields.

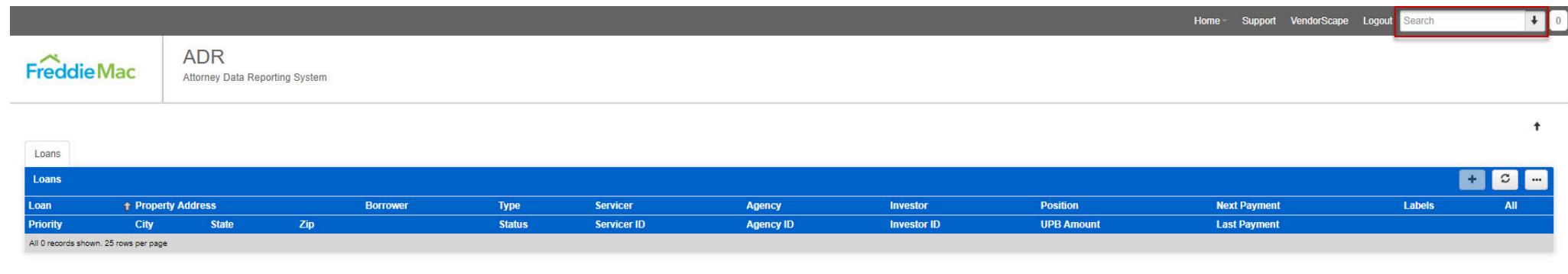
Please note: The loan information may not be populated when you try to open the Foreclosure. Freddie Mac provides limited loan information prior to cases being opened. Once the Foreclosure case has been opened, the loan and property information will populate within 24 to 48 hours. []

3.1 OPENING A FORECLOSURE

1. Select Loans from the Dashboard drop-down menu.



2. Search for the loan you need to activate by entering the Freddie Mac loan number in the search field and click enter. Freddie Mac loan numbers are 9 characters in length and cannot be altered by users.



3. Your search results are presented.

Home Support VendorScape Logout 000031275 0

FreddieMac ADR Attorney Data Reporting System

Loans

Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment		
000031275 0					-- ACTIVE		Freddie Mac 000031275					

All 1 records shown. 25 rows per page (1.351 seconds)

4. You can also click on the down arrow located next to the search field.

Home Support VendorScape Logout **Search** 0

FreddieMac ADR Attorney Data Reporting System

Loans

Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment		
000031275 0					-- ACTIVE		Freddie Mac 000031275					

All 1 records shown. 25 rows per page (1.351 seconds)

5. The loan search panel is expanded.

Home Support VendorScope Logout Search ↑ 0

FreddieMac ADR Attorney Data Reporting System

Loans

Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer		Agency	Investor		Position	Next
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last		
000031275 0					-- ACTIVE		Freddie Mac 000031275					

All 1 records shown. 25 rows per page

Loan Search

ID:

Loan:

Address:

City:

State:

Servicer:

Servicer Loan:

Insurer:

Insurer Loan:

Investor:

Investor Loan:

Agency:

Agency Loan:

Pool Number:

Status:

UPB Amount:

Original Balance:

Filters: Active
 Active Status
 Can Delete
 Can Insert
 Can Update
 Final Status
 Not Active Closed
 Unread Notifications

Search

6. Enter the loan number in the loan field.

Home Support VendorScope Logout Search ↑ 0

FreddieMac ADR Attorney Data Reporting System

Loans

Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer		Agency	Investor		Position	Next
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last		
000031275 0					-- ACTIVE		Freddie Mac 000031275					

All 1 records shown. 25 rows per page

Loan Search

ID:

Loan:

Address:

City:

State:

Servicer:

Servicer Loan:

Insurer:

Insurer Loan:

Investor:

Investor Loan:

7. Click Search.

Home Support VendorScape Logout Search 0

FreddieMac ADR Attorney Data Reporting System

Loans

Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	Loan ID	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment			
000031275 0	NC			Mark Bohannon	— ACTIVE	NATIONSTAR MORTGAGE LLC	Freddie Mac 000031275						

All 1 records shown. 25 rows per page

Loan Search

ID: 000031275

Loan: 000031275

Address:

City:

State: —

Servicer:

Servicer Loan:

Insurer:

Insurer Loan:

Investor:

Search

8. Your search results are presented.

Home Support VendorScape Logout Search 0

FreddieMac ADR (UAT) Attorney Data Reporting System

Home / Loans

Loans

Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	Loan ID	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment			
000031275 0	NC			Mark Bohannon	— ACTIVE	NATIONSTAR MORTGAGE LLC	Freddie Mac 000031275		\$21,312,321.00				

All 2 records shown. 25 rows per page (4.728 seconds)

9. You will be able to view those loans that are located in your designated state and you have a contract with the servicer that is servicing the loan. If you are unsure as to your coverage area or of the servicers which you have a contract, please review the Organization section.

10. Click on the Loan hyperlink in the Loan column.

Home Support VendorScape Logout Search 0

FreddieMac ADR Attorney Data Reporting System

Home / Loans

Loans

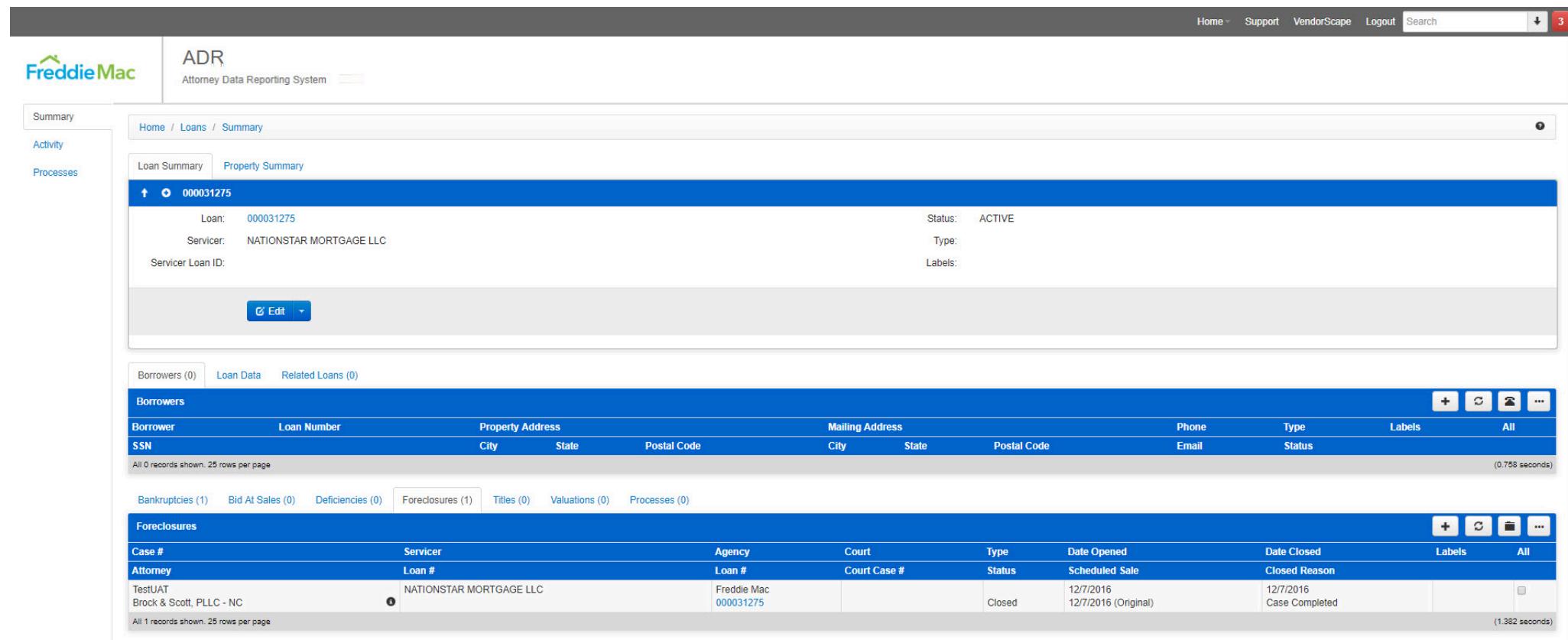
Smart Search: 000031275

Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	Loan ID	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment			
000031275 0	NC			Mark Bohannon	— ACTIVE	NATIONSTAR MORTGAGE LLC	Freddie Mac 000031275		\$21,312,321.00				

All 2 records shown. 25 rows per page (4.728 seconds)

11. You are directed to Loan Summary page,

<https://www.freddiemacadr.com/Mortgage/Loan.ashx/Summary?ID=XXXXXX>



The screenshot shows the Freddie Mac Attorney Data Reporting System (ADR) interface. The top navigation bar includes links for Home, Support, VendorScape, Logout, and Search, with a '3' notification badge. The main header 'ADR' and 'Attorney Data Reporting System' is displayed. On the left, a sidebar menu offers Summary, Activity, and Processes options. The main content area shows the 'Loan Summary' tab selected, displaying loan details: Loan: 000031275, Servicer: NATIONSTAR MORTGAGE LLC, and Servicer Loan ID: 000031275. The status is ACTIVE, and there are empty fields for Type and Labels. Below this is an 'Edit' button. The 'Borrowers' section shows a table with columns for Borrower, Loan Number, Property Address, Mailing Address, Phone, Type, Labels, and All. The 'Foreclosures' section shows a table with columns for Case #, Servicer, Agency, Court, Type, Date Opened, Date Closed, Labels, and All. Both sections include pagination and time metrics (0.758 seconds and 1.382 seconds).

BE ADVISED: The blue bar on the Foreclosure Summary panel has an arrow and a plus sign. This pattern is used in all process summary sections

- Arrow – Lets the user collapse the entire panel section so it's hidden except for the blue bar
- Plus sign – Lets the user expand and collapse the hidden sections of a panel

-

NOTE: *The loan information may not be populated when you try to open the Foreclosure. Freddie Mac provides limited loan information prior to cases being opened. Once the Foreclosure case has been opened, the loan and property information will populate within 24 to 48 hours.*

12. Navigate to the Foreclosure tab. Select the "+" to Open a NEW foreclosure file. Be advised that a new Foreclosure File can NOT be opened in the instance that another file is already open, whether it be under your firm or another firm besides your own.

Bankruptcies (1)	Bid At Sales (0)	Deficiencies (0)	Foreclosures (0)	Titles (0)	Valuations (0)	Processes (0)			
Foreclosures									
Case #	Servicer	Agency	Court	Type	Date Opened	Date Closed	Labels	All	
Attorney	Loan #	Loan #	Court Case #	Status	Scheduled Sale	Closed Reason			
All 0 records shown. 25 rows per page									
(0.178 seconds)									

13. The Date Opened should be the date in which you received the file, and not necessarily the date that you open the file in ADR (although if you did receive the file the same day that you are opening it in ADR, then this is okay). Also be advised that a future date cannot be entered.

Please note that the following fields are required:

Field Name	Description
Foreclosure	Name or Title
Status	Status
Product Category	Product Type
Assigned Organization	Attorney
Attorney Loan ID	Attorney Loan ID
Original Balance	Original Loan Amount
UPB Amount	Unpaid Principal Balance
Property Address	Property Address
Property City	Property City
Property State	Property State
Property Postal Code	Property Postal Code
Date Opened	Date Opened
Borrower First Name	Borrower First Name
Borrower Last Name	Borrower Last Name

Co-Borrower First Name*	Co-Borrower First Name
Co-Borrower Last Name*	Co-Borrower Last Name

*Only required IF there is a Co-Borrower ('Yes' is selected for Co-Borrower)

Loan Summary

Loan: 00003127

Servicer: NATIONSTAR MORTGAGE LLC

Servicer Loan ID:

Status: ACTIVE

Type:

Labels:

 Edit ▾

Borrowers (0) [Loan Data](#) [Related Loans \(0\)](#)

Borrower

All 0 records shown. 25 rows per page

(0.347 seconds)

Bankruptcies (1) Bid At Sales (0) Deficiencies (0) Foreclosures Titles (0) Valuations (0) Processes (0)

• New Foreclosure

Foreclosure:	<input type="text"/>	Status:	<input type="text"/>
Template:	Foreclosure <input type="button" value="▼"/>	Type:	<input type="text"/>
<hr/>			
Court:	<input type="text"/>	Deficiency Status:	<input type="text"/>
Case Number:	<input type="text"/>	Opening Bid Amount:	<input type="text"/>
Scheduled Sale Date:	<input type="text"/>	Surplus Funds:	<input type="text"/>
Sale Date Type:	<input type="text"/>	Redemption Date:	<input type="text"/>
Sale Date Status:	<input type="text"/>	Redemption Amount:	<input type="text"/>
Sale Amount:	<input type="text"/>	Sub Trustee:	<input type="text"/>
Sold To Name:	<input type="text"/>	Trustee Guarantee #:	<input type="text"/>

Judge:	Name
	Address
	City
	--
	ZIP Code
	Phone
	Email
Sale Location:	Name
	Address
	City

Auction:	Name
	Address
	City
	—
	ZIP Code
	Phone
	Email
Third Party:	Name
	Address
	City

<input type="text"/> ZIP Code	<input type="text"/> ZIP Code
<input type="text"/> Phone	<input type="text"/> Phone
<input type="text"/> Email	<input type="text"/> Email
Assigned Org.: <input type="text"/>	Date Opened: <input type="text"/>
Assigned Person: <input type="text"/>	Opened Reason: <input type="text"/>
 	Date Due: <input type="text"/>
 	Priority: <input type="text"/>
 	Date Closed: <input type="text"/>
 	Closed Reason: <input type="text"/>
Servicer: <input type="text"/> NATIONSTAR MORTGAGE LLC	Borrower
Servicer Loan ID: <input type="text"/>	First Name: <input type="text"/>
Lien Priority Type: <input type="text"/>	Last Name: <input type="text"/>
Loan Type: <input type="text"/>	SSN: <input type="text"/> XXX-XX-XXXX
Original Balance: <input type="text"/>	Co-Borrower: <input type="radio"/> Yes
UPB Amount: <input type="text"/> \$21,312,321.00	<input type="radio"/> No
Deed of Trust	
Filing Date: <input type="text"/>	
Recording Date: <input type="text"/>	
Property	
Address: <input type="text"/>	
City: <input type="text"/>	
State: <input type="text"/> NC	
Postal Code: <input type="text"/>	
<input type="button"/> Save	<input type="button"/> Cancel

PLEASE NOTE

If your firm does business in several states, and you are a member of each organization, you will need to be sure the correct organization is in the drop-down. If you do not have the correct state and organization, you will not be able to open the foreclosure.

14. The Foreclosure has been opened – See the Status and Date Opened reflect the date entered, and status “Open” – Be advised that the Date Opened should be the date the Foreclosure File was originally referred to your firm, and necessarily the date in which you open the file (unless the referral date and the date you open the file are the same, then the date would reflect the same).

NOTE:

- Freddie Mac has initiated a Direct Title Pilot in which Servicers are phased in over a period of time. Creating a Foreclosure Case on loans that are serviced by the Servicers in the pilot will automatically trigger a Foreclosure Title, this will be rendered in the Title Tab (details in [Section 3.2 Foreclosure Title Order \[#fc-title\]](#)). You will be notified by each Servicer as they are phased in.

Foreclosures							
Case #	Servicer	Agency	Court	Type	Date Opened	Date Closed	Labels
Attorney	Loan #	Loan #	Court Case #	Status	Scheduled Sale	Closed Reason	All
TestTitle Weinstein & Riley, P.S. - CO	SPECIALIZED LOAN SERVICING LLC 427605	Freddie Mac 045301611		Open	9/18/2018		

All 1 records shown. 25 rows per page (0.547 seconds)

15. The number you provided in the Attorney Case Number field will be highlighted blue (as shown below). This Case Number is clickable and is the way you will access the file itself.

NOTE: if this attorney case number is not highlighted blue, this means you do not have access to the file. If your organization has an open file that you do not have access to, you will need to contact your Security Administrator and request for access.

Foreclosures							
Case #	Servicer	Agency	Court	Type	Date Opened	Date Closed	Labels
Attorney	Loan #	Loan #	Court Case #	Status	Scheduled Sale	Closed Reason	All
TestTitle Weinstein & Riley, P.S. - CO	SPECIALIZED LOAN SERVICING LLC 427605	Freddie Mac 045301611		Open	9/18/2018		

All 1 records shown. 25 rows per page (0.547 seconds)

16. Upon clicking the blue hyperlink (the Atty Case Number), you are brought to the Foreclosure Summary page, which shows all the details of said Foreclosure. This panel can be expanded or retracted based on the clicking of the white arrow icon and the white "+" icon (which becomes a "-" when clicked, and so on), as shown below.

ADR
Attorney Data Reporting System

Home / Foreclosures / Summary

Foreclosure Summary Loan Summary Property Summary

Foreclosure: [TestTitle](#) Status: Open
Template: Foreclosure Type:
Labels:

[Edit](#)

Summary Workflow Accounting Messages Documents Processes

Home / Foreclosures / Summary

Foreclosure Summary Loan Summary Property Summary

TestTitle

Foreclosure: TestTitle	Status: Open
Template: Foreclosure	Type:
Court:	Deficiency Status:
Case Number:	Opening Bid Amount:
Scheduled Sale Date:	Surplus Funds:
Sale Date Type:	Redemption Date:
Sale Date Status:	Redemption Amount:
Sale Amount:	Sub Trustee:
Sold To Name:	Trustee Guarantee #:
Plaintiff:	
Defendant:	
FC Name Of:	
Vesting Name Of:	
Judge:	Auction:
Sale Location:	Third Party:
Client:	Date Opened: 9/18/2018
Client Person:	Opened Reason:
Vendor:	Date Due:
Vendor Person:	Priority:
Assigned Org.: Weinstein & Riley, P.S. - CO	Date Closed:
Assigned Person:	Closed Reason:
Created Date: 9/18/2018 7:46 AM	Updated Date: 9/18/2018 7:46 AM
Created Person: testattorney2@quandis.com	Updated Person: testattorney2@quandis.com

Edit

3.2 FORECLOSURE TITLE ORDER

Once a Foreclosure Case has been opened, a Foreclosure Title will automatically be triggered, as long as the Loan's Servicer is included in the Pilot. The automated process may take up to an hour to trigger the Foreclosure Title Order, please use the refresh icon on the Titles tab, and if a Title Order does not appear within the expected time, follow the instructions starting with the second bullet point below.

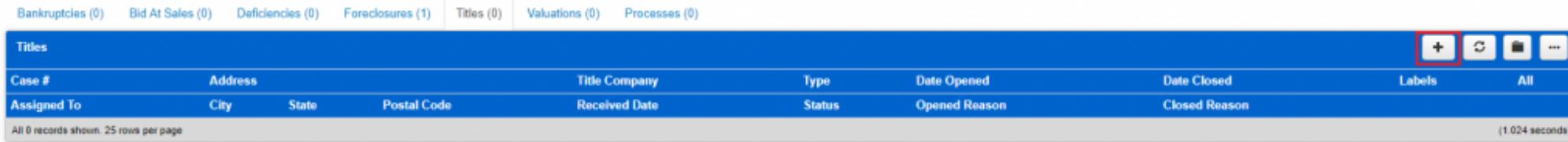
- The Foreclosure Title will render within the Title Tab. Within the record row the user can perform the following functions:
 - Case # Hyperlink – Select 'Case #' hyperlink to navigate to the specific Foreclosure Title Summary
Note: Title Summary information will be covered in greater detail in [Section 12 Title Home Page \[#title-home\]](#)
 - Flyout – Multiple Titles can be opened on the same page, new tabs render across the panel
 - Edit – User can edit inline
 - Information – 'i' icon provides additional information related to the Title



Titles							
Case #	Address			Title Company	Type	Date Opened	Date Closed
Assigned To	City	State	Postal Code	Received Date	Status	Opened Reason	Closed Reason
014367467 Weinstein & Riley, P.S. - CO	123 Main Street Anytown, CO 20147			First American Title 9/14/2018	Foreclosure Open	9/13/2018	

All 1 records shown. 25 rows per page (0.759 seconds)

- If a Title Order is needed, but the system did not generate one automatically, one can be placed manually by clicking the "+" icon in the Titles tab:



Titles							
Case #	Address			Title Company	Type	Date Opened	Date Closed
Assigned To	City	State	Postal Code	Received Date	Status	Opened Reason	Closed Reason
All 0 records shown. 25 rows per page (1.024 seconds)							

- Be sure the view is expanded by clicking the "+" icon to the left of "New Title" in the header bar. Enter all required information and click "Save". In most cases, because many of the required data elements were also required when creating the Foreclosure Case, the data elements will be pre-populated here. Please validate these data elements for accuracy.

New Title

Title: <input type="text"/>	Status: <input type="text"/>																							
Template: <input type="text" value="Foreclosure Title"/>	Type: <input type="text"/>																							
Commitment #: <input type="text"/> Received: <input type="text"/> Reviewed: <input type="text"/> Assoc. Type: <input type="text"/> Ownership Type: <input type="text"/> Ownership Desc.: <input type="text"/> MISMO Version ID: <input type="text"/> Vendor Order ID: <input type="text"/> Vendor Trans. ID: <input type="text"/> Agency Case ID: <input type="text"/> Base Loan Amount: <input type="text"/> Lender Case ID: <input type="text"/> GSE Manner Held: <input type="text"/> Insurance Amount: <input type="text"/> Policy Effective: <input type="text"/> Policy Witness: <input type="text"/> Vesting Validation: <input type="text"/>		Document: <input type="text" value="Drag-and-drop document here"/>  Legal Validation: <input type="text"/> Relationship Desc.: <input type="text"/> Lien Desc.: <input type="text"/> Disbursement: <input type="text"/> Leasehold Exp.: <input type="text"/> Rights Desc.: <input type="text"/> Usage Desc.: <input type="text"/> Est. Cash Out Amt.: <input type="text"/> Refinance Cash Out: <input type="text"/> Mortgage Mod.: <input type="text"/> Lender Loan ID: <input type="text"/> Original Loan Amt.: <input type="text"/> Note: <input type="text"/> Title Clearance: <input type="text"/> Assigned: <input type="text"/> Potential Loss: <input type="text"/>																						
Requested <table border="1"> <tr> <td>Closing Date: <input type="text"/></td> <td>Product Category: <input type="text"/></td> </tr> <tr> <td>Coverage Amt.: <input type="text"/></td> <td>Action Type: <input type="text"/></td> </tr> <tr> <td>Product Desc.: <input type="text"/></td> <td>Service Price Amt.: <input type="text"/></td> </tr> <tr> <td>Product Name: <input type="text"/></td> <td>Service Due Date: <input type="text"/></td> </tr> <tr> <td>Base Loan Amount: <input type="text"/></td> <td>Mortgage Mod.: <input type="text"/></td> </tr> <tr> <td>Lender Case ID: <input type="text"/></td> <td>Lender Loan ID: <input type="text"/></td> </tr> <tr> <td>GSE Manner Held: <input type="text"/></td> <td>Original Loan Amt.: <input type="text"/></td> </tr> <tr> <td>Insurance Amount: <input type="text"/></td> <td>Note: <input type="text"/></td> </tr> <tr> <td>Policy Effective: <input type="text"/></td> <td>Title Clearance: <input type="text"/></td> </tr> <tr> <td>Policy Witness: <input type="text"/></td> <td>Assigned: <input type="text"/></td> </tr> <tr> <td>Vesting Validation: <input type="text"/></td> <td>Potential Loss: <input type="text"/></td> </tr> </table>			Closing Date: <input type="text"/>	Product Category: <input type="text"/>	Coverage Amt.: <input type="text"/>	Action Type: <input type="text"/>	Product Desc.: <input type="text"/>	Service Price Amt.: <input type="text"/>	Product Name: <input type="text"/>	Service Due Date: <input type="text"/>	Base Loan Amount: <input type="text"/>	Mortgage Mod.: <input type="text"/>	Lender Case ID: <input type="text"/>	Lender Loan ID: <input type="text"/>	GSE Manner Held: <input type="text"/>	Original Loan Amt.: <input type="text"/>	Insurance Amount: <input type="text"/>	Note: <input type="text"/>	Policy Effective: <input type="text"/>	Title Clearance: <input type="text"/>	Policy Witness: <input type="text"/>	Assigned: <input type="text"/>	Vesting Validation: <input type="text"/>	Potential Loss: <input type="text"/>
Closing Date: <input type="text"/>	Product Category: <input type="text"/>																							
Coverage Amt.: <input type="text"/>	Action Type: <input type="text"/>																							
Product Desc.: <input type="text"/>	Service Price Amt.: <input type="text"/>																							
Product Name: <input type="text"/>	Service Due Date: <input type="text"/>																							
Base Loan Amount: <input type="text"/>	Mortgage Mod.: <input type="text"/>																							
Lender Case ID: <input type="text"/>	Lender Loan ID: <input type="text"/>																							
GSE Manner Held: <input type="text"/>	Original Loan Amt.: <input type="text"/>																							
Insurance Amount: <input type="text"/>	Note: <input type="text"/>																							
Policy Effective: <input type="text"/>	Title Clearance: <input type="text"/>																							
Policy Witness: <input type="text"/>	Assigned: <input type="text"/>																							
Vesting Validation: <input type="text"/>	Potential Loss: <input type="text"/>																							
Requested <table border="1"> <tr> <td>Closing Date: <input type="text"/></td> <td>Product Category: <input type="text"/></td> </tr> <tr> <td>Coverage Amt.: <input type="text"/></td> <td>Action Type: <input type="text"/></td> </tr> <tr> <td>Product Desc.: <input type="text"/></td> <td>Service Price Amt.: <input type="text"/></td> </tr> <tr> <td>Product Type Desc.: <input type="text"/></td> <td>Borrower Loan Amt.: <input type="text"/></td> </tr> <tr> <td>Product Type: <input type="text"/></td> <td></td> </tr> </table>			Closing Date: <input type="text"/>	Product Category: <input type="text"/>	Coverage Amt.: <input type="text"/>	Action Type: <input type="text"/>	Product Desc.: <input type="text"/>	Service Price Amt.: <input type="text"/>	Product Type Desc.: <input type="text"/>	Borrower Loan Amt.: <input type="text"/>	Product Type: <input type="text"/>													
Closing Date: <input type="text"/>	Product Category: <input type="text"/>																							
Coverage Amt.: <input type="text"/>	Action Type: <input type="text"/>																							
Product Desc.: <input type="text"/>	Service Price Amt.: <input type="text"/>																							
Product Type Desc.: <input type="text"/>	Borrower Loan Amt.: <input type="text"/>																							
Product Type: <input type="text"/>																								
Service <table border="1"> <tr> <td>Est. Price Amt.: <input type="text"/></td> <td>Actual Completion: <input type="text"/></td> </tr> <tr> <td>Actual Price Amt.: <input type="text"/></td> <td>Est. Off Hold: <input type="text"/></td> </tr> <tr> <td>Est. Completion: <input type="text"/></td> <td>Cancel Price Amt.: <input type="text"/></td> </tr> </table>			Est. Price Amt.: <input type="text"/>	Actual Completion: <input type="text"/>	Actual Price Amt.: <input type="text"/>	Est. Off Hold: <input type="text"/>	Est. Completion: <input type="text"/>	Cancel Price Amt.: <input type="text"/>																
Est. Price Amt.: <input type="text"/>	Actual Completion: <input type="text"/>																							
Actual Price Amt.: <input type="text"/>	Est. Off Hold: <input type="text"/>																							
Est. Completion: <input type="text"/>	Cancel Price Amt.: <input type="text"/>																							
Closing <table border="1"> <tr> <td>Agent Order ID: <input type="text"/></td> <td>Scheduled Closing: <input type="text"/></td> </tr> <tr> <td>Document Rcvd.: <input type="text"/></td> <td>Actual Closing: <input type="text"/></td> </tr> <tr> <td>Est. Closing: <input type="text"/></td> <td></td> </tr> </table>			Agent Order ID: <input type="text"/>	Scheduled Closing: <input type="text"/>	Document Rcvd.: <input type="text"/>	Actual Closing: <input type="text"/>	Est. Closing: <input type="text"/>																	
Agent Order ID: <input type="text"/>	Scheduled Closing: <input type="text"/>																							
Document Rcvd.: <input type="text"/>	Actual Closing: <input type="text"/>																							
Est. Closing: <input type="text"/>																								

Original Mortgagee:
Registration:
Registration Indicator:

Registration Status:
Tax Number ID:

Insured: Name
Address
City
ZIP Code
Phone
Email
Office: Name
Address
City
ZIP Code
Phone
Email

Title Held By: Name
Address
City
ZIP Code
Phone
Email

Assigned Org.: ←
Assigned Person:

Date Opened: ←
Opened Reason:
Date Due:
Priority:
Date Closed:
Closed Reason:

Servicer: SPECIALIZED LOAN SERVICING L
Servicer Loan ID: ←
Lien Priority Type:
Loan Type:
Original Balance: ←
UPB Amount: ←
Deed of Trust
Filing Date:
Recording Date:
Property
Address: ←
City: ←
State: KY
Postal Code: ←

Borrower
First Name: ←
Last Name: ←
Phone: (818) 555-1212 123
SSN: XXX-XX-5615
Change SSN: No
 Yes
Co-Borrower: Yes
 No

- Upon clicking “Save”, the data entered will be validated, and if any validations fail, an error message will be presented. Where possible, correct the data elements and click “Save” again. If the error message does not provide details, or there are any questions regarding the error, please contact adr.support@quandis.com.

3.3 LOAN HAS ACTIVE FORECLOSURE

If a law firm managed a prior Foreclosure and did not close out the Foreclosure you will need to contact the firm and have them close their Foreclosure.

1. When you click on the Foreclosure tab, the information contained in the Foreclosure Summary is completed with another firm’s information. You cannot open your Foreclosure action until the prior firm closes their action.

Bankruptcies (0)	Bid At Sales (0)	Deficiencies (0)	Foreclosures (3)	Titles (0)	Valuations (5)	Processes (0)										
Foreclosures																
Case #		Servicer		Agency		Court		Type		Date Opened		Date Closed		Labels	All	
Attorney	Loan #	Attorney	Loan #	Freddie Mac				Status	Scheduled Sale			Closed Reason				
580416 McCalla Raymer Pierce, LLC - GA	                                                                                           <img alt="Information															

Related Processes (3)		Title (1)		Valuations (3)									
Processes		Type		Client		Assigned To		Opened		Labels		All	
Template	Process	Status	Vendor			Due		Closed					
468250611 Foreclosure Title	468250611 Foreclosure Title	Open	McCalla Raymer Pierce, LLC - GA			9/12/2018		9/3/2018					
51206912-2 Motion For Relief	51206912-2 Motion For Relief	Closed	Wells Fargo Bank, N.A. McCalla Raymer Pierce, LLC - GA					11/4/2013	11/5/2013				
468250611 Proof Of Claim	468250611 Proof Of Claim	POC	McCalla Raymer Pierce, LLC - GA					9/9/2013					

3. Selecting the hyperlink in the Process column will direct you to the process.

ADR
(UAT) Attorney Data Reporting System

Home / Titles / Summary

Summary Activity Workflow Messages Documents Processes

Title Summary Property Summary Loan Summary

468250611

Title: 468250611 Status: Open
Template: Foreclosure Title Type: Foreclosure
Labels:

[Edit](#)

Public Records (0) Transactions (0)

Transactions

Transaction	Type	Sale Date	Finance Lender	Second Lender	Buyer	Labels	All
Loan	Status	Sale Amount	Finance Amount	Second Amount	Seller		

All 0 records shown. 25 rows per page (0.256 seconds)

Tasks (0) Holds (0)

Title Tasks

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
Status					Days to Completion	Updated By	

All 0 records shown. 25 rows per page (1.37 seconds)

Messages (1)

Messages

Quick Message

Message	Date Added	Type	Labels	All
Template Unable to edit order	9/18/2018 8:23 AM testattorney2@quandis.com			

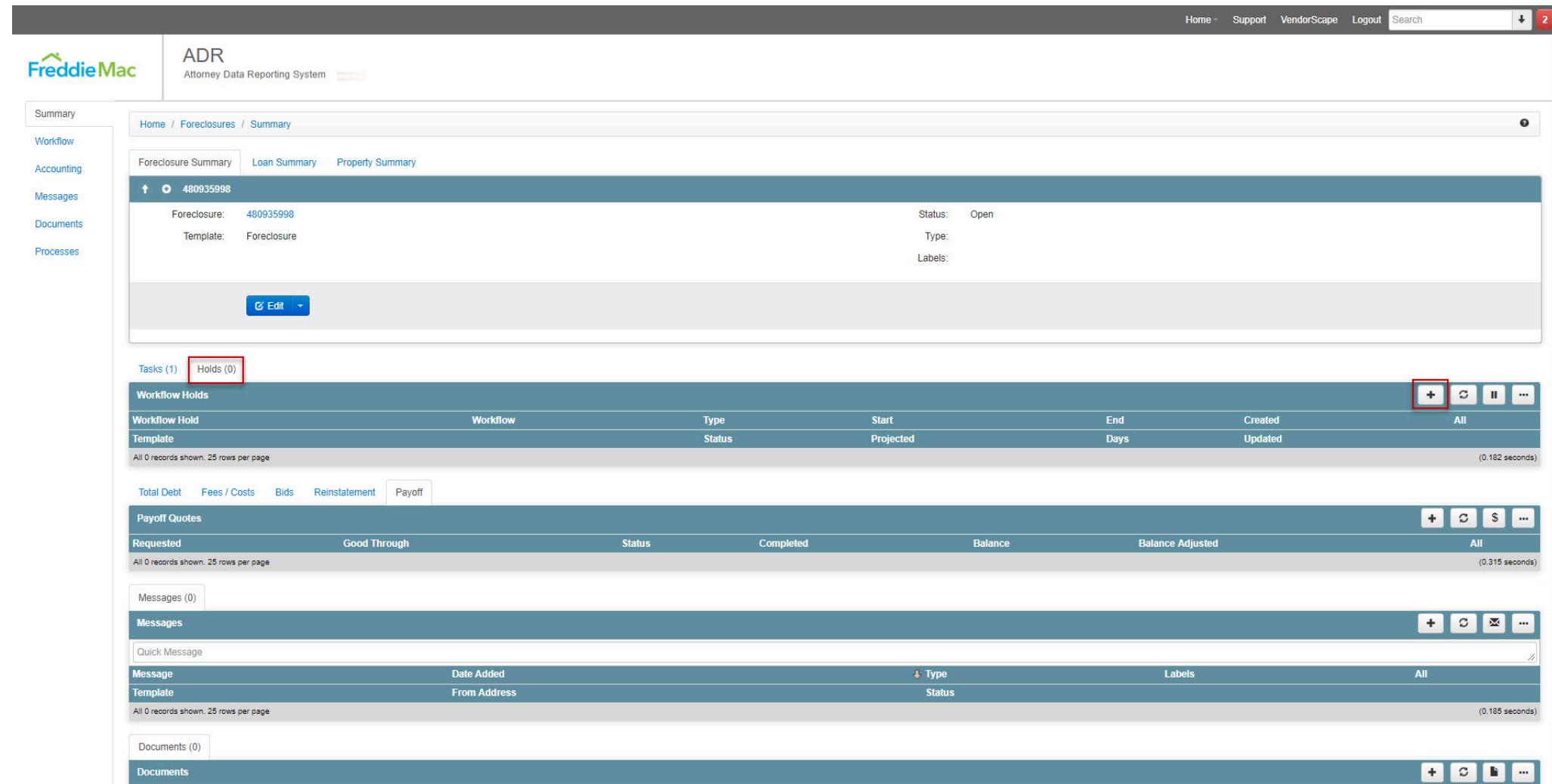
All 1 records shown. 25 rows per page (0.262 seconds)

4. PLEASE NOTE: The value in the Process column for Repurchases is the Freddie Mac Loan Number.

4. HOLDS

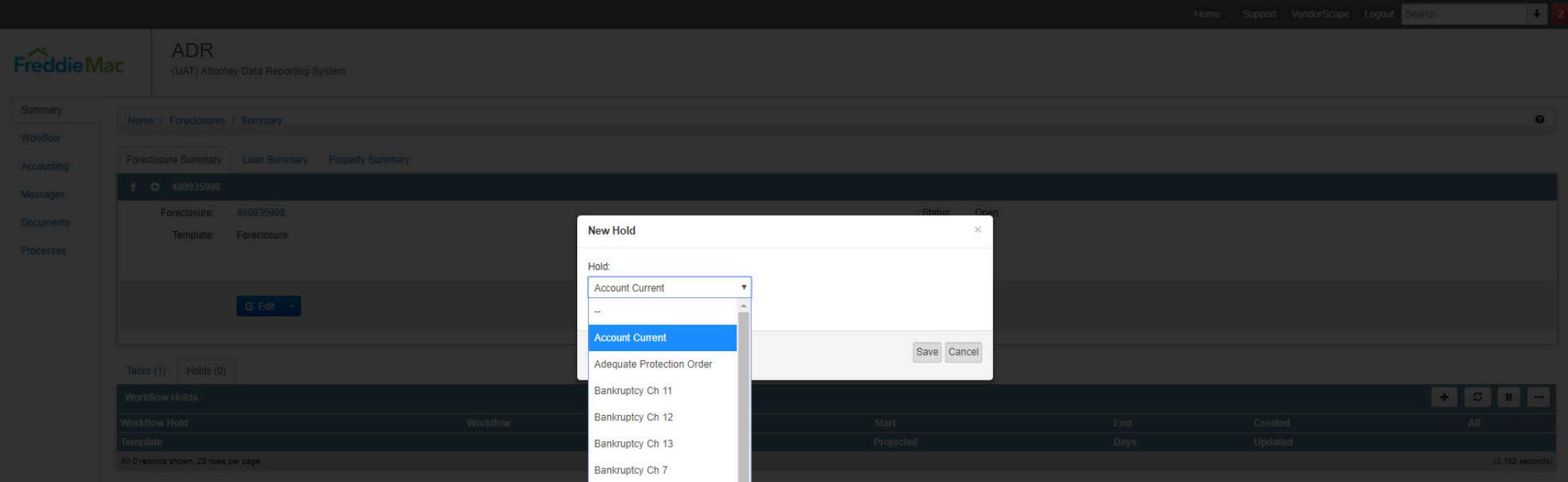
4.1 PLACING AN ORDER ON HOLD

1. From the Foreclosure and Bankruptcy Summary Pages, to the right of the Tasks tab, you will find the "Holds" tab. Click on it to see any active Holds. From the right, you can see the "+" to Add a New Workflow Hold.



The screenshot shows the Freddie Mac Attorney Data Reporting System (ADR) interface. The top navigation bar includes links for Home, Support, VendorScape, Logout, and a search bar. The main content area displays a summary for file number 480935998, showing Foreclosure details: Foreclosure: 480935998, Template: Foreclosure, Status: Open, Type: (empty), and Labels: (empty). Below this is an 'Edit' button. At the bottom of this section are 'Tasks (1)' and 'Holds (0)' buttons, with 'Holds (0)' highlighted by a red box. The 'Workflow Holds' table follows, with a red box highlighting the '+' button in the top right corner. The table columns are: Workflow Hold, Workflow, Type, Start, End, Created, and Updated. The table shows a single entry: Template, Status, Projected, Days, and Updated. Below the table are buttons for Total Debt, Fees / Costs, Bids, Reinstatement, and Payoff. The 'Payoff Quotes' section is shown below, followed by 'Messages (0)' and 'Messages' table, and finally 'Documents (0)' and 'Documents' table.

2. Select a Hold type from the Hold drop-down menu.



3. The Description field is populated with the Hold type from the Hold drop-down menu.

Note: The auto-populated description can be used or you can enter a different description.

- Start date is populated with current date. A past date or current date can be entered. A future date cannot be entered.
- Projected date is when the Hold is expected to be removed. It can be the current date or a future date. Projected date is a required field.
- Comments are populated with following message: Delay added on XX. You can move to the next step and retain the default comments, add additional comments to the default comments or you can delete the default comments and add your own comments. In this example, comments were added to the default comment.
- Click Save, and the Hold is saved.



Summary
Workflow
Accounting
Messages
Documents
Processes

 Edit

Tasks (1) Holds

New Workflow Hold

Workflow Hold: Status: Type: Duration Scale: Yes NoDuration: Start: Estimated Projected

10/4/2018 Actual

Reason Type: Completion: EstimatedReason Detail:

10/4/2018 Projected

 ActualAssigned Organization: Team: Assigned Person:

Comments: Hold added on 10/4/2018.

↓ Documents :

Drag-and-drop documents here to add as attachments to this hold.

 Save Cancel

Total Debt Fees / Costs Bids Reinstatement Payoff

Payoff Quotes



Priority message notification icon is populated.



Summary
Workflow
Accounting
Messages
Documents
Processes

 Edit

Tasks (1) Holds (1)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created
Template		Status	Projected	Days	Updated
Account Current Account Current	Freddie NJ Judicial Foreclosure		10/4/2018 10/4/2018	0	10/4/2018 2:01 PM by testattorney2 10/4/2018 2:01 PM by testattorney2

All 1 records shown. 25 rows per page

Notifications

Hold: Account Current

Workflow: Freddie NJ Judicial Foreclosure

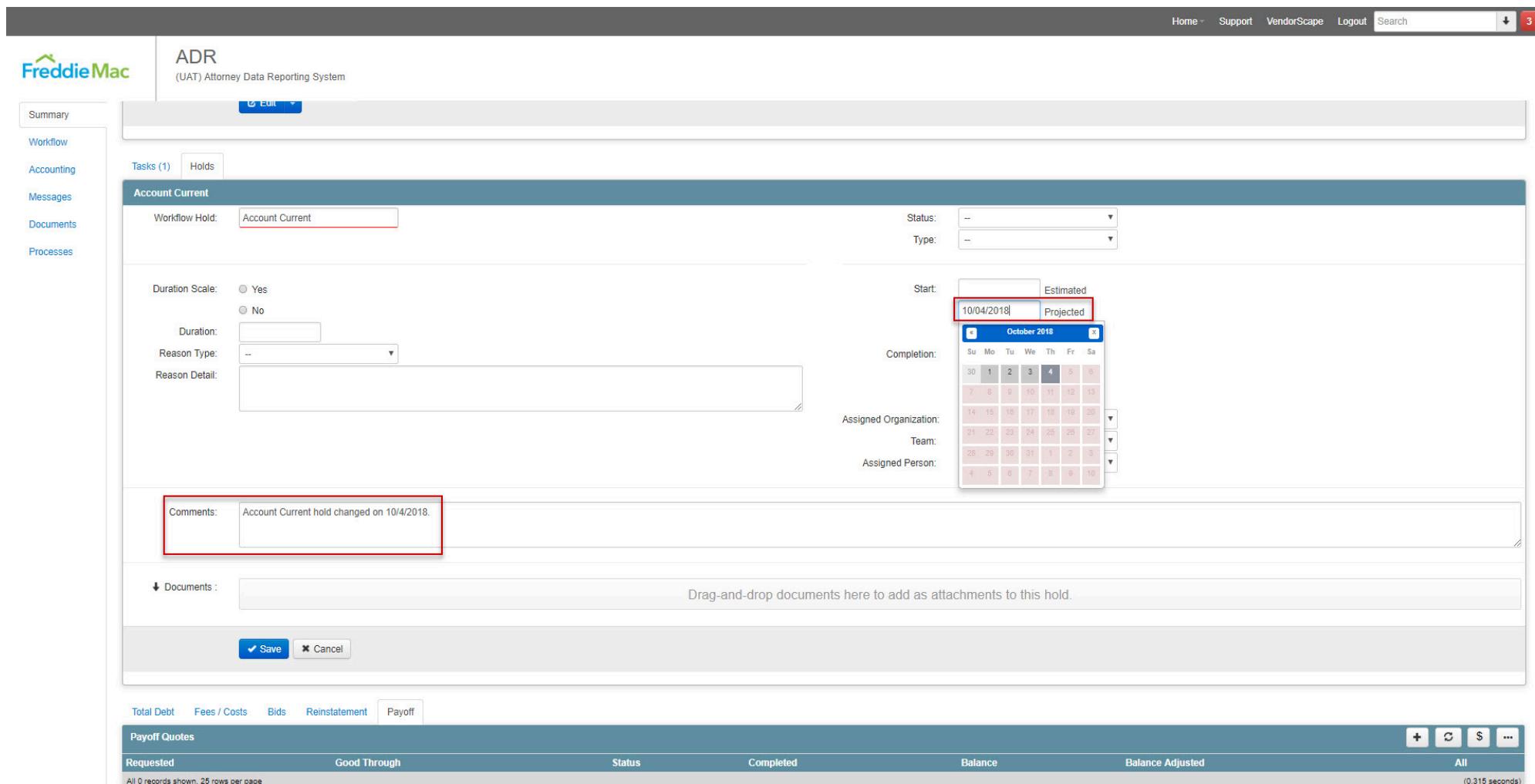
Task: Foreclosure File Received

Show All

(0.155 seconds)

4.2 REPROJECTING A HOLD

1. To update a Projected date for a Hold, simply access the Holds tab from the Foreclosure Tasks panel and choose the hold you wish to have adjusted.
2. Update the Projected date to the new date.
- Note:** The comments field have a default comments that populate
3. Select 'Save'



The screenshot shows the Freddie Mac ADR (UAT) Attorney Data Reporting System interface. The 'Holds' tab is selected. The 'Workflow Hold' is set to 'Account Current'. The 'Start' date is '10/04/2018' and the 'Projected' date is also '10/04/2018'. A red box highlights the 'Comments' field which contains the text 'Account Current hold changed on 10/4/2018.' The 'Save' button is visible at the bottom.

4. Projected date shows as updated within the panel

ADR
(UAT) Attorney Data Reporting System

Summary

Workflow

Accounting

Messages

Documents

Processes

Tasks (1) Holds (1)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created
Template	Freddie NJ Judicial Foreclosure	Status	Projected	Days	Updated
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	0	10/4/2018 2:01 PM by testattorney2
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	0	10/4/2018 2:07 PM by testattorney2

All 1 records shown. 25 rows per page (0.068 seconds)

4.3 COMPLETE A HOLD

1. To End a Hold, access the Foreclosure Tasks panel and select "Holds". Select the open hold/delay by clicking the name of the Hold, which will appear as a blue, clickable hyperlink.
2. Enter a date in the 'Completion – Actual' field.



ADR

(UAT) Attorney Data Reporting System

 Summary
 Workflow
 Accounting
 Messages
 Documents
 Processes

Foreclosure Summary Loan Summary Property Summary

↑ 480935998

Foreclosure: 480935998 Status: Open
 Template: Foreclosure Type:
 Labels:

[Edit](#)

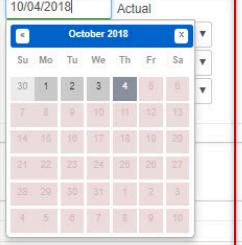
Tasks (1) Holds

Account Current

Workflow Hold: Status:
 Duration Scale: Yes No Type:

Duration: Completion: Estimated
 Reason Type: 10/4/2018 Projected
 Reason Detail:

Comments: Account Current hold changed on 10/4/2018. Hold completion date set.

Assigned Organization: Team:
 Assigned Person: 

Documents: Drag-and-drop documents here to add as attachments to this hold.

3. Select 'Save'. Hold is now closed

4. Priority message notification will clear once a Hold is closed

ADR
 (UAT) Attorney Data Reporting System

Home Support VendorScape Logout Search 2

Summary
 Workflow
 Accounting
 Messages
 Documents
 Processes

Tasks (1) Holds (1)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created
Template		Status	Projected	Days	Updated
Account Current	Freddie NJ Judicial Foreclosure	<input type="text" value="Open"/>	10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2
Account Current		<input type="text" value="Open"/>	10/4/2018	0	10/4/2018 2:13 PM by testattorney2

All 1 records shown. 25 rows per page

Notifications

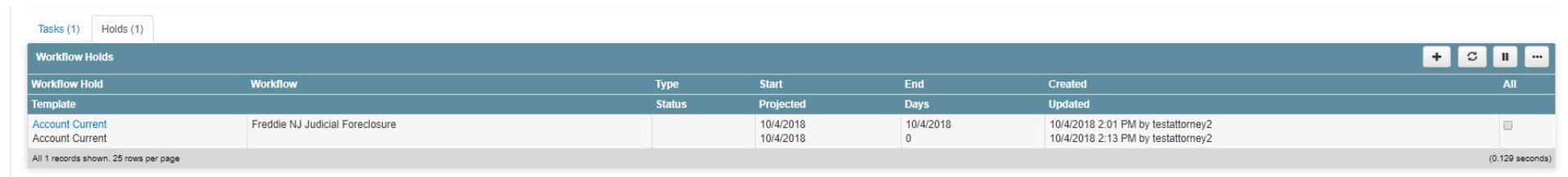
Workflow: Freddie NJ Judicial Foreclosure
 Task: Foreclosure File Received

Hold: Account Current notification is now gone since the hold has been closed

Show All

4.4 REVIEW A HOLD

1. User can review Hold information in the Tasks panel or select the hyperlink to view details of the hold.



Workflow Holds						
Workflow Hold	Workflow	Type	Status	Start	End	Created
Template		Workflow Hold	Template			
Account Current	Freddie NJ Judicial Foreclosure			10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2
Account Current				10/4/2018	0	10/4/2018 2:13 PM by testattorney2

5 LITIGATION DETAIL

5.1 ADDING LITIGATION DETAIL

1. Click on Holds tab.



Summary
Workflow
Accounting
Messages
Documents
Processes

Home / Foreclosures / Summary

Foreclosure Summary Loan Summary Property Summary

↑ ⏪ 480935998

Foreclosure: 480935998 Status: Open
Template: Foreclosure Type:
Labels:

Edit

Tasks (1) Holds (0)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	(0.182 seconds)

Total Debt Fees / Costs Bids Reinstatement Payoff

Payoff Quotes

Requested	Good Through	Status	Completed	Balance	Balance Adjusted	All
All 0 records shown. 25 rows per page						(0.315 seconds)

Messages (0)

Messages

Quick Message

Message	Date Added	Type	Labels	All
Template	From Address	Status		(0.185 seconds)

Documents (0)

Documents

2. From the dropdown of available Holds, choose Litigation Detail.

Foreclosure Summary Loan Summary Property Summary

↑ ⏪ 480935998

Foreclosure: 480935998 Status: Open
Template: Foreclosure Type:
Labels:

Edit

Tasks (1) Holds (1)

New Hold

Hold: Litigation Detail

Save Cancel

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	(0.182 seconds)

3. Litigation Details form will render. The following fields are required:

- Start Date

Note: Current Date will be populated; Past Date can be selected and Future Date cannot be selected

- Projected Date

Note: Date can be the current date or a future date. Holds cannot be projected using a past date. This is the date you will follow up on the Litigation.

- Comments: Auto-populates with default comments; You can append to the existing comments with additional commentary that will explain the reason for creating the Litigation Detail.

- Party Status Code – Options listed below

- FM Party Plaintiff
 - FM Party Defendant
 - FM Not Named

- Litigation Status Code – Options listed below

- Complaint Filed
 - Dispositive Motion Filed
 - Discovery Period
 - Trial Date
 - Notice of Appeal Filed
 - Appellate Briefing Schedule
 - Post Trial Proceedings

- Litigation Date (optional field) – Date of the litigation trial. The date can be a past date, a future date, or a current date, but cannot be set to a date prior to the Start Date.

- Litigation Claim Code – Options listed below

- 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

4. Select 'Save' upon entering required fields

5. Hold panel displays the following:

- Workflow Hold
- Start date
- Projected date
- End date
- Number of days hold

Note: If the hold is open, the number of days is based on the start date to the current date. If the hold is closed, the number of days is based on the start date to the closed date.

Workflow Holds						All
Workflow Hold	Workflow	Type	Start	End	Created	
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	
Account Current			10/4/2018	0	10/4/2018 2:13 PM by testattorney2	
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018		10/4/2018 3:39 PM by testattorney2	
Litigation Detail			10/5/2018	0	10/4/2018 3:39 PM by testattorney2	

All 2 records shown. 25 rows per page (0.282 seconds)

6. Review the Litigation detail by clicking on the  icon next to the Hold Name hyperlink

Workflow Holds						All
Workflow Hold	Workflow	Type	Start	End	Created	
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	
Account Current			10/4/2018	0	10/4/2018 2:13 PM by testattorney2	
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018		10/4/2018 3:39 PM by testattorney2	
Litigation Detail			10/5/2018	0	10/4/2018 3:39 PM by testattorney2	

All 2 records shown. 25 rows per page (0.282 seconds)



The screenshot shows a software interface with a modal window titled "Change Log for Litigation Detail". The modal contains a table with two columns: "Subject" and "Date". The subject is "testattorney2@quandis.com" and the date is "10/4/2018". The modal has a "Close" button at the bottom right. In the background, there is a list of "Workflow Holds" with two entries. The second entry, "Litigation Detail", is highlighted with a red box around its "Workflow Hold" and "Workflow" columns. The background list includes columns for "Workflow Hold", "Workflow", "Type", "Start", "End", "Created", and "Updated". The "Updated" column for the highlighted row shows two entries: "10/4/2018 3:39 PM by testattorney2" and "10/4/2018 3:39 PM by testattorney2".

7. The Litigation Detail will be listed in the priority messages. Click on arrow for further details.

Home Support VendorScape Logout Search 3

ADR
(UAT) Attorney Data Reporting System

On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Summary Workflow Accounting Messages Documents Processes

Foreclosure Summary Loan Summary Property Summary

↑ 480935998

Foreclosure: 480935998 Status: Open
Template: Foreclosure Type:
Labels:

Tasks (1) Holds (2)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	<input type="checkbox"/>
Account Current			10/4/2018	0	10/4/2018 2:13 PM by testattorney2	<input type="checkbox"/>
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018		10/4/2018 3:39 PM by testattorney2	<input type="checkbox"/>
Litigation Detail			10/5/2018	0	10/4/2018 3:39 PM by testattorney2	<input type="checkbox"/>

All 2 records shown. 25 rows per page (0.282 seconds)

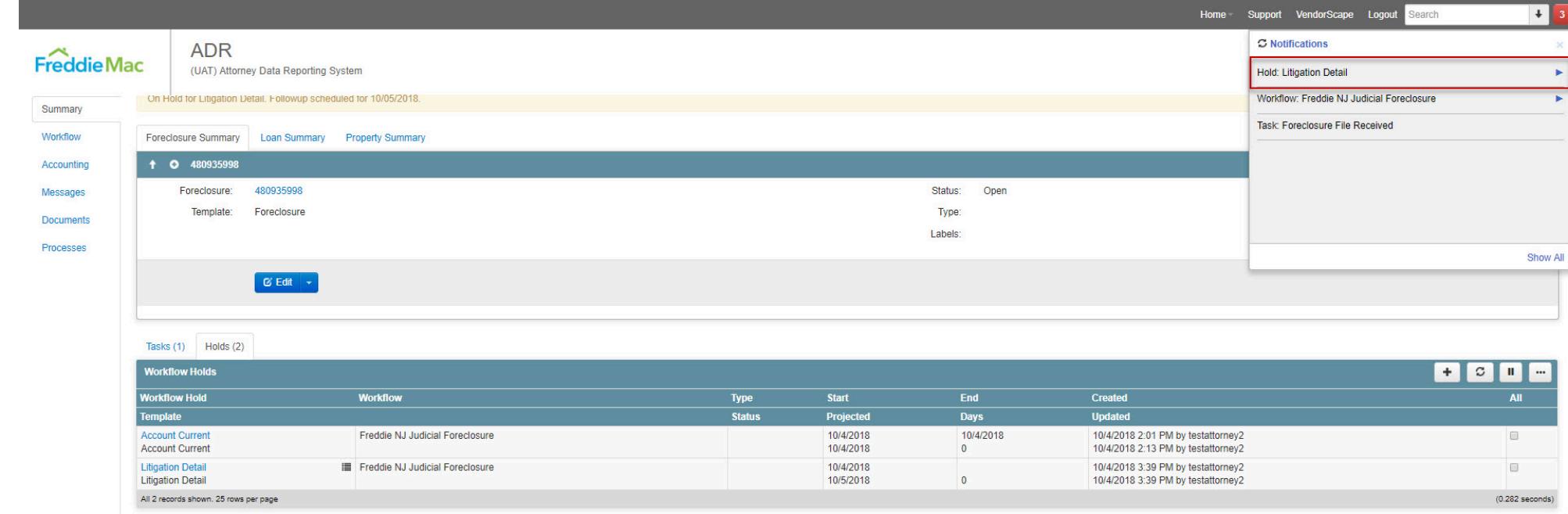
Notifications

Hold: Litigation Detail

Workflow: Freddie NJ Judicial Foreclosure

Task: Foreclosure File Received

Show All



Home Support VendorScape Logout Search 3

ADR
(UAT) Attorney Data Reporting System

On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Summary Workflow Accounting Messages Documents Processes

Foreclosure Summary Loan Summary Property Summary

↑ 480935998

Foreclosure: 480935998 Status: Open
Template: Foreclosure Type:
Labels:

Tasks (1) Holds (2)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	<input type="checkbox"/>
Account Current			10/4/2018	0	10/4/2018 2:13 PM by testattorney2	<input type="checkbox"/>
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018		10/4/2018 3:39 PM by testattorney2	<input type="checkbox"/>
Litigation Detail			10/5/2018	0	10/4/2018 3:39 PM by testattorney2	<input type="checkbox"/>

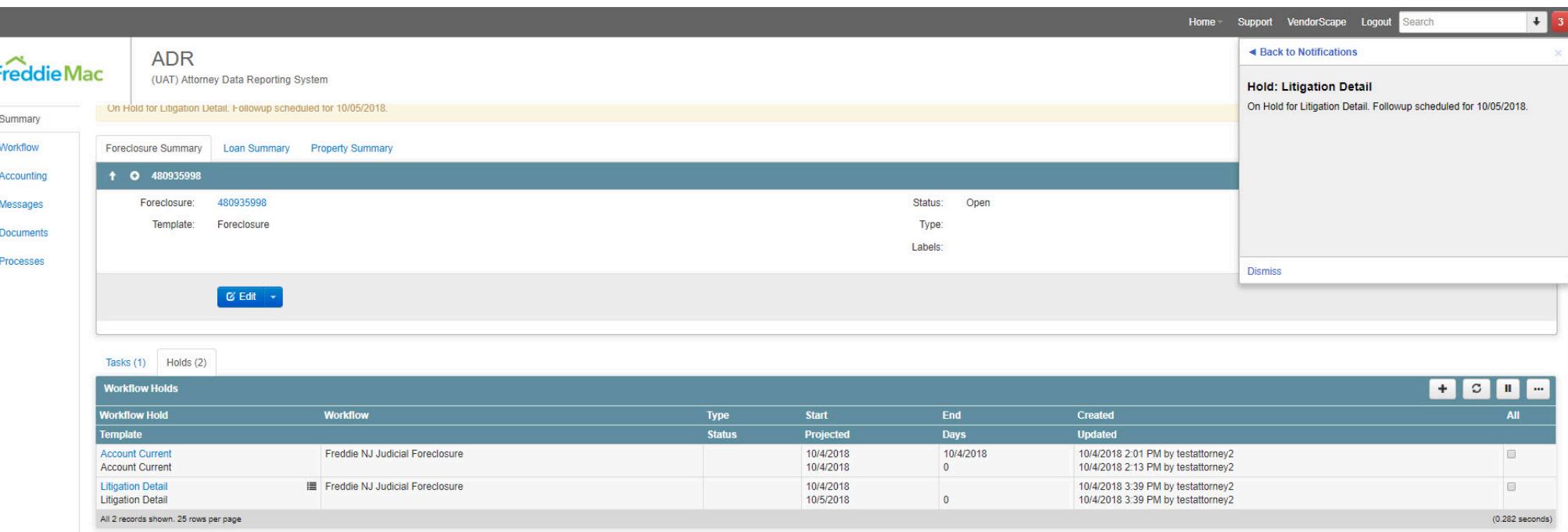
All 2 records shown. 25 rows per page (0.282 seconds)

Back to Notifications

Hold: Litigation Detail

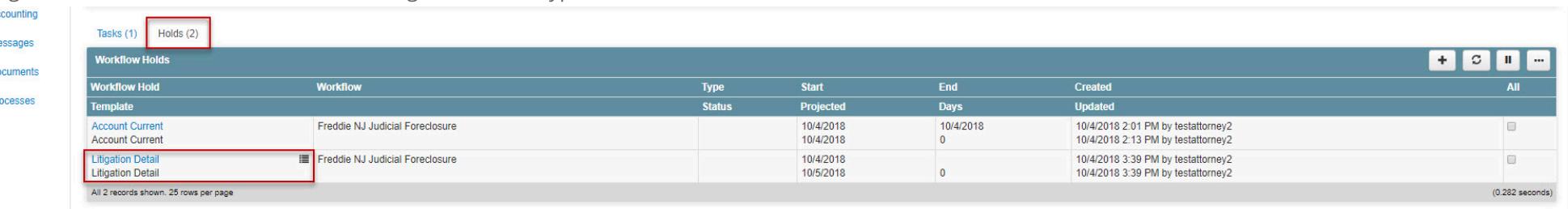
On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Dismiss



5.2 REMOVE LITIGATION DETAIL

1. Navigate to the Holds tab and click on the Litigation Detail hyperlink.



Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	0	10/4/2018 2:13 PM by testattorney2	
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018	10/5/2018	10/4/2018 3:39 PM by testattorney2	
Litigation Detail	Freddie NJ Judicial Foreclosure			0	10/4/2018 3:39 PM by testattorney2	

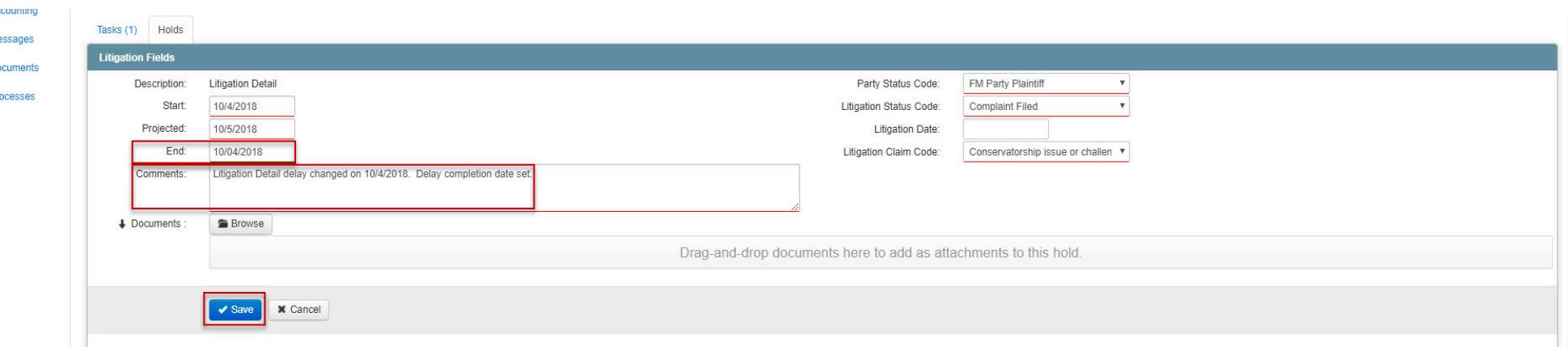
All 2 records shown. 25 rows per page (0.282 seconds)

2. Enter 'End' date field.

Note: This can be a current or past date, but cannot be a future date.

3. The Comments field will automatically populate with the following: Litigation Detail changed on MM-DD-YYYY. You can append this comment with additional information regarding the results of the litigation.

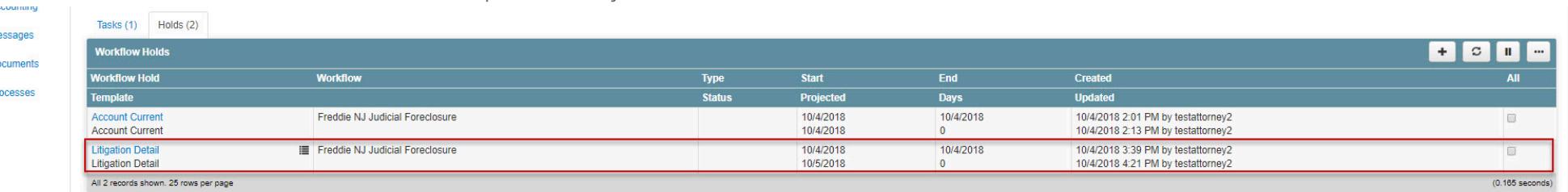
4. Click Save.



Litigation Fields

Description: Litigation Detail	Party Status Code: FM Party Plaintiff
Start: 10/4/2018	Litigation Status Code: Complaint Filed
Projected: 10/5/2018	Litigation Date: <input type="text"/>
End: 10/04/2018	Litigation Claim Code: Conservatorship issue or challen
Comments: Litigation Detail delay changed on 10/4/2018. Delay completion date set.	
↓ Documents : <input type="button" value="Browse"/>	Drag-and-drop documents here to add as attachments to this hold.

5. You are directed to the hold tab. The end date is complete. The days are calculated based on the start date and end date.



Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	0	10/4/2018 2:13 PM by testattorney2	
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 3:39 PM by testattorney2	
Litigation Detail	Freddie NJ Judicial Foreclosure			0	10/4/2018 4:21 PM by testattorney2	

All 2 records shown. 25 rows per page (0.165 seconds)

6. The priority message has been removed.

5.3 UPDATE LITIGATION DETAIL

1. Navigate to the Holds tab and select Litigation Detail hyperlink.

2. Perform all necessary updates within the hold, including re-activating the hold by removing the End Date. All rules mentioned above apply to performing updates.

Note: If the End Date of the Hold is more than 180 days in the past, none of the information can be updated. This is for auditing and reporting purposes. Additionally, only one active Hold can exist per case, so if any additional active Holds are associated with your case, you will not be able to remove the End Date. Once all updates are made, click Save.

Accounting Messages Documents Processes

Tasks (1) Holds (1)

Litigation Fields

Description:	Litigation Detail	Party Status Code:	FM Party Defendant
Start:	10/4/2018	Litigation Status Code:	Complaint Filed
Projected:	10/5/2018	Litigation Date:	
End:		Litigation Claim Code:	Conservatorship issue or challen
Comments:	Litigation Detail delay changed on 10/4/2018. Delay completion date removed.		
↓ Documents :	<input type="button" value="Browse"/> Drag-and-drop documents here to add as attachments to this hold.		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

5.4 VIEW LITIGATION DETAIL REVISIONS

1. View the changes made to the task by clicking on the horizontal parallel lines in the delay column.

Accounting Messages Documents Processes

Tasks (1) Holds (2)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	<input type="checkbox"/>
Account Current			10/4/2018	0	10/4/2018 2:13 PM by testattorney2	<input type="checkbox"/>
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018		10/4/2018 3:39 PM by testattorney2	<input type="checkbox"/>
Litigation Detail			10/5/2018	0	10/4/2018 4:29 PM by testattorney2	<input type="checkbox"/>

All 2 records shown. 25 rows per page (0.11 seconds)

2. The change log is displayed. This log will list the user(s) that changed the Litigation Detail and the date of the changes along with the comments.

Messages Documents Processes

Foreclosure: 480935998 Status: Open

Template: Foreclosure

Change Log for Litigation Detail

Subject	Date
testattorney2@quandis.com	10/4/2018
Hold Litigation Detail Changed	

Tasks (1) Holds (2)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template		Status	Projected	Days	Updated	
Account Current	Freddie NJ Judicial Foreclosure		10/4/2018	10/4/2018	10/4/2018 2:01 PM by testattorney2	<input type="checkbox"/>
Account Current			10/4/2018	0	10/4/2018 2:13 PM by testattorney2	<input type="checkbox"/>
Litigation Detail	Freddie NJ Judicial Foreclosure		10/4/2018		10/4/2018 3:39 PM by testattorney2	<input type="checkbox"/>
Litigation Detail			10/5/2018	0	10/4/2018 4:29 PM by testattorney2	<input type="checkbox"/>

5.5 WHEN TO USE LITIGATION DETAIL

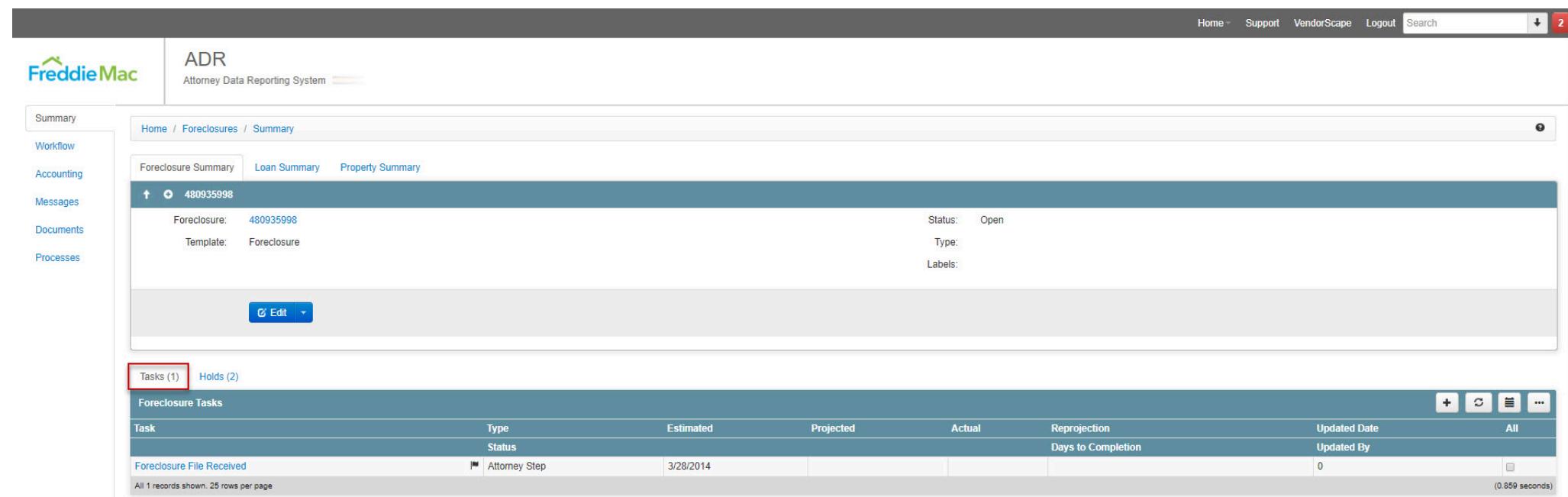
Refer to your Freddie Mac guidelines to determine when to use the Litigation Detail feature and when you should or should not proceed with the Foreclosure or Bankruptcy action whenever resolving a litigated matter.

6 FORECLOSURE TASKS

PLEASE NOTE: Your screens may slightly differ from what is below.

6.1 COMPLETING TASKS

The due date for the first task is based on the start date entered when the foreclosure was opened. If an error was made in entering the start date, you will need to close the foreclosure and open a new foreclosure. Please refer to the [Closing the Foreclosure](#) [[# Closing the Foreclosure](#)] section for instructions on closing a foreclosure.



The screenshot shows the Freddie Mac Attorney Data Reporting System (ADR) interface. The top navigation bar includes links for Home, Support, VendorScape, Logout, and a search bar. The main header displays the system name 'ADR' and 'Attorney Data Reporting System'. On the left, a vertical sidebar lists navigation links: Summary, Workflow, Accounting, Messages, Documents, and Processes. The main content area shows a summary for a foreclosure case with ID 480935998. The summary details include: Foreclosure: 480935998, Status: Open, Type: Foreclosure, and Labels: (empty). Below this is an 'Edit' button. At the bottom of the main content area, there are two tabs: 'Tasks (1)' (which is highlighted with a red box) and 'Holds (2)'. The 'Tasks' tab displays a table titled 'Foreclosure Tasks' with the following columns: Task, Type, Estimated, Projected, Actual, Reprojection, Updated Date, and All. One task is listed: 'Foreclosure File Received' (Status: Attorney Step, Estimated: 3/28/2014, Actual: null, Reprojection: null, Updated Date: 0, Updated By: null). The bottom of the table area shows the message 'All 1 records shown. 25 rows per page' and a timestamp '(0.859 seconds)'.

Foreclosure Tasks (include Projections)						Toggle Detail
Task	Type	Estimated	Projected	Actual	Reprojection	Days to Completion
File Received	Attorney Step Complete	7/24/2018	7/23/2018	7/23/2018		0
Record Notice of Default	Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018		-4
Posting and Publishing of Sale/NOS Mailings	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018		-104
Sale Scheduled	Attorney Step Complete	11/6/2018	11/5/2018	7/23/2018		-105
Sale Held	Attorney Step Started	11/30/2018	8/16/2018			
Deed Recorded	Attorney Step	12/3/2018	8/19/2018			

1. Navigate to Tasks tab

2. Select All Tasks from the Options drop-down to view list of tasks.

Foreclosure Tasks (include Projections)						Updated Date	All
Task	Type	Estimated	Projected	Actual	Reprojection	Days to Completion	Updated By
File Received	Attorney Step Complete	7/24/2018	7/23/2018	7/23/2018		0	7/23/2018 aangle@quandis.com
Record Notice of Default	Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018		-4	7/23/2018 aangle@quandis.com
Posting and Publishing of Sale/NOS Mailings	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018		-104	7/23/2018 aangle@quandis.com
Sale Scheduled	Attorney Step Complete	11/6/2018	11/5/2018				
Sale Held	Attorney Step Started	11/30/2018	8/16/2018				
Deed Recorded	Attorney Step	12/3/2018	8/19/2018				

3. Click on a task name hyperlink.

4. Enter either the current date or a past date in Actual Date field. You cannot enter a future date. This date cannot be prior to the completion date of the prior task.

Tasks

Sale Scheduled

Task:	Sale Scheduled	Start:	7/23/2018
Description:	Sale Scheduled	Completion:	11/6/2018 Estimated
Date of Sale:	7/25/2018		11/5/2018 Projected
Comments:	Completed		
↓ Documents :	<input type="button" value="Browse"/> Drag-and-drop documents here to link to this task.		
<input type="button" value="✓ Save"/> <input type="button" value="✗ Cancel"/>			

In this example, a date prior to 07-23-2018 cannot be entered in the Actual Date field for the task Sale Scheduled because the prior task (Posting and Publishing of Sale/NOS Mailings) has a complete date of 07-23-2018.

Tasks (6)

Foreclosure Tasks (include Projections)

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
	Status				Days to Completion	Updated By	
File Received	Attorney Step Complete	7/24/2018	7/23/2018	7/23/2018	0	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Record Notice of Default	Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018	-4	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Posting and Publishing of Sale/NOS Mailings	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018	-104	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Sale Scheduled	Attorney Step Complete	11/6/2018	11/5/2018	7/23/2018	-105	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Sale Held	Attorney Step Started	11/30/2018	8/16/2018			7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Deed Recorded	Attorney Step	12/3/2018	8/19/2018				

All 6 records shown. 25 rows per page. (0.553 seconds)

5. The body field defaults to the standard comment: [Task Name] changed on <<Current Date>>

You can either delete this comment and enter a comment or you can append a comment to the default comment. In this example, the comment was appended.

Tasks

Sale Scheduled

Task:	Sale Scheduled	Start:	7/23/2018
Description:	Sale Scheduled	Completion:	11/6/2018 Estimated
Date of Sale:	07/25/2018		11/05/2018 Projected
Comments:	Sale Scheduled changed on 7/23/2018. Example: Enter Additional Text		
↓ Documents :	<input type="button" value="Browse"/> Drag-and-drop documents here to link to this task.		
<input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/>			

6. Click Save.

Tasks

Sale Scheduled

Task:	Sale Scheduled	Start:	7/23/2018
Description:	Sale Scheduled	Completion:	11/6/2018 Estimated
Date of Sale:	07/25/2018		11/05/2018 Projected
Comments:	Sale Scheduled changed on 7/23/2018. Example: Enter Additional Text		
↓ Documents :	<input type="button" value="Browse"/> Drag-and-drop documents here to link to this task.		
<input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/>			

7. You are returned to task tab. Actual Completion column is populated with the date entered in the Actual date field.

Tasks (6)

Foreclosure Tasks (include Projections)

Task	Type	Estimated	Projected	Actual	Reprojection	Days to Completion	Updated Date	All
	Status							
File Received	☒ Attorney Step Complete	7/24/2018	7/23/2018	7/23/2018		0	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Record Notice of Default	☒ Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018		-4	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Posting and Publishing of Sale/NOS Mailings	☒ Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018		-104	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Sale Scheduled	☒ Attorney Step Complete	11/6/2018	11/5/2018	7/23/2018		-105	7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Sale Held	☒ Attorney Step Started	11/30/2018	8/16/2018				7/23/2018 aangle@quandis.com	<input type="checkbox"/>
Deed Recorded	☒ Attorney Step	12/3/2018	8/19/2018					

All 6 records shown. 25 rows per page (0.553 seconds)

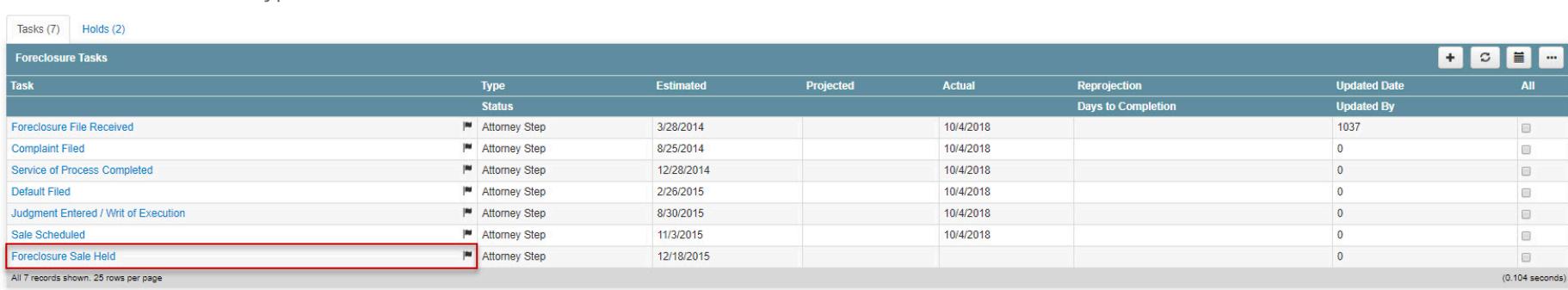
8. This view will list only those tasks that are due to be completed. You will not see all tasks associated with the foreclosure. To view all tasks, please refer to the Viewing All Tasks section of this document.

6.2 FORECLOSURE SALE HELD TASK

PLEASE NOTE: Your screens may slightly differ from what is below.

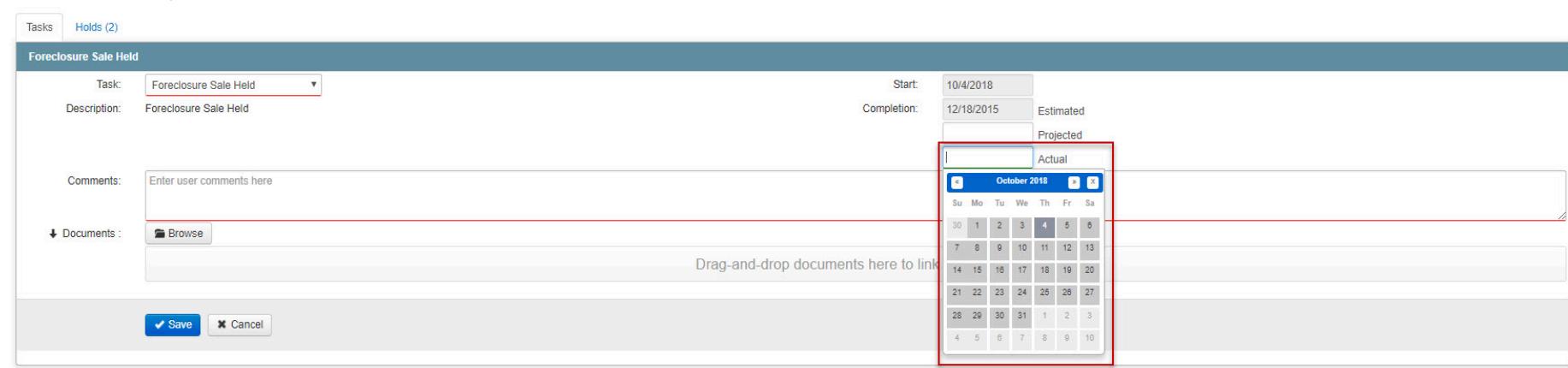
The Foreclosure Sale Held Task has additional elements that will be required when it is completed.

1. Click on the "Foreclosure Sale Held" hyperlink.



Foreclosure Tasks							
Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
	Status				Days to Completion	Updated By	
Foreclosure File Received	Attorney Step	3/28/2014		10/4/2018		1037	
Complaint Filed	Attorney Step	8/25/2014		10/4/2018		0	
Service of Process Completed	Attorney Step	12/28/2014		10/4/2018		0	
Default Filed	Attorney Step	2/26/2015		10/4/2018		0	
Judgment Entered / Writ of Execution	Attorney Step	8/30/2015		10/4/2018		0	
Sale Scheduled	Attorney Step	11/3/2015		10/4/2018		0	
Foreclosure Sale Held	Attorney Step	12/18/2015				0	

2. Enter the date the Foreclosure Sale was held in the Actual Date field. As with all other tasks, you cannot enter a future date in this field. This date cannot be prior to the completion date of the prior task.



Task: Foreclosure Sale Held

Description: Foreclosure Sale Held

Comments: Enter user comments here

Start: 10/4/2018

Completion: 12/18/2015

Actual: (highlighted with a red box)

Actual Date Selection: October 2018 (highlighted with a red box)

Buttons: Save, Cancel

3. The following required fields will populate once an 'Actual' date is entered

Field Name	Comments
Opening Bid Amount	Value must be greater than 0

Credit Bid Amount	Value must be greater than 0
Credit Bid Received	Date Received
Sale Amount	<ul style="list-style-type: none"> Value must be greater than 0 when Sold To Name is 'Back to beneficiary' Value must be greater than 100 when Sold to Name is Third Party
Loan UPB Amount	Value must be greater than 0
Total Debt	Value must be greater than 0
Deficiency Status	Status
Sold To Name	<ul style="list-style-type: none"> Back to Beneficiary or Third Party If 'Third Party' is selected additional fields are required

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Tasks Holds (2)

Foreclosure Sale Held

Task: Foreclosure Sale Held

Description: Foreclosure Sale Held

Start: 10/4/2018

Completion: 12/18/2015 Estimated

Completion: 10/4/2018 Projected

Completion: 10/4/2018 Actual

Sale Amount: 100

Loan UPB Amount: 200,000

Total Debt: 130,000

Deficiency Status: Preserved

Sold To Name: Back to Beneficiary

Comments: Comment

Documents: Browse

Drag-and-drop documents here to link to this task.

Save Cancel

4. When Third Party is selected, Third Party Contact fields are displayed. The following fields are required:

- Third Party Contact Name
- Address

- City
- State
- Postal Code
- Phone

ADR
(UAT) Attorney Data Reporting System

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FreddieMac

Summary Tasks **Holds (2)**

Foreclosure Sale Held

Task: Foreclosure Sale Held

Description: Foreclosure Sale Held

Please enter Bid and Sale information below

Opening Bid Amount:	150,000	Start:	10/4/2018
Credit Bid Amount:	10,000	Completion:	12/18/2015 Estimated
Credit Bid Received:	10/04/2018		10/4/2018 Projected
			10/4/2018 Actual
Sale Amount:	100	Loan UPB Amount:	200,000
Total Debt:	130,000	Deficiency Status:	Preserved
Sold To Name:	Third Party		
Third Party Contact Name:			
Address:			
City:			
State:			
Postal Code:			
Phone:			
Email:			

Comments: Comment

Documents :

Drag-and-drop documents here to link to this task.

5. Once all data has been entered, click Save.

6. Actual Completion column is populated with the date entered in the Actual date field.

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Tasks (8)
Holds (2)

Foreclosure Tasks

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
	Status						
Foreclosure File Received	Attorney Step	3/28/2014		10/4/2018		1037	
Complaint Filed	Attorney Step	8/25/2014		10/4/2018		0	
Service of Process Completed	Attorney Step	12/28/2014		10/4/2018		0	
Default Filed	Attorney Step	2/26/2015		10/4/2018		0	
Judgment Entered / Writ of Execution	Attorney Step	8/30/2015		10/4/2018		0	
Sale Scheduled	Attorney Step	11/3/2015		10/4/2018		0	
Foreclosure Sale Held	Attorney Step	12/18/2015		10/4/2018		0	
Deed Recorded	Attorney Step	1/17/2016		10/4/2018		0	

All 8 records shown. 25 rows per page (0.215 seconds)

7. Refresh the page and verify the appropriate values are displayed in the Foreclosure panel. Some values will be displayed by expanding the view. To expand the Foreclosure panel, click on the “down arrow” to the left of “Foreclosure” in the blue bar. For Internet Explorer Version 8 and older, the “down arrow” is not displayed, so you will need to click on the white space to the left of the word “Foreclosure”.



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On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Foreclosure Summary Loan Summary Property Summary

↑ ◻ 480935998

Foreclosure: 480935998

Status: Open

Template: Foreclosure

Type:

Labels:

Court:

Deficiency Status: Preserved

Case Number: 3242354

Opening Bid Amount:

Scheduled Sale Date:

Surplus Funds:

Sale Date Type:

Redemption Date:

Sale Date Status:

Redemption Amount:

Sale Amount: \$95.00

Sub Trustee:

Sold To Name: Back to Beneficiary

Trustee Guarantee #:

Plaintiff:

Defendant:

FC Name Of:

Vesting Name Of:

Auction:

Judge:

Third Party:

Sale Location:

Client:

Date Opened: 3/27/2014

Client Person:

Opened Reason:

Vendor:

Date Due:

Vendor Person:

Priority:

Assigned Org: Stern & Eisenberg, PC - NJ

Date Closed:

Assigned Person:

Closed Reason:

Created Date: 12/2/2015 6:46 PM

Updated Date: 10/4/2018 5:00 PM

Created Person: wcoulter@quandis.com

Updated Person: testattorney2@quandis.com

Edit ▾

8. You may view the UPB amount entered by accessing the loan's summary page. This can be accessed from the foreclosure file by selecting the loan number in the "Foreclosure Summary" panel. On the loan's summary page, review the "Loan Summary" panel and confirm the entered "UPB Amount".

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On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Foreclosure Summary Loan Summary Property Summary

↑ ← 480935998

Loan:	480935998	Status:	
Servicer:	VPC OCWEN LOAN SERVICING	Type:	
Servicer Loan ID:	2200080957	Labels:	
Agency:	Freddie Mac	Equity Position:	
Agency Loan ID:	480935998	Equity Date:	
Investor:		Mortgage Type:	
Investor Loan ID:		Mortgage Description:	
Insurer:	GENERAL ELEC. MTG. INS. CO.	Lien Priority Type:	
Insurer Loan ID:		Lien Priority Desc.:	
Insurer Guarantee %:		Lien Priority Type Orig.:	
Insurer Premium %:		Child Loan Type:	
Loan Funding Date:		Child Loan Description:	
Interest Rate Current:		Amortization Type:	
Interest In Advance:	No	Amortization Desc.:	
Capitalized Loan:	No	Amortization Term:	
Loan Maturity Date:		Ntl. Housing Act Type:	
Interest Only:	No	Hud SFDMSID:	
Interest Only Term:		MERS Loan ID:	
UPB Amount:	\$200,000.00	Context Identifier Type:	
Next Pymt. Due:	8/1/2013	Context Description:	
Last Pymt. Received:		Context Loan ID:	
Interest Paid Through:		LTV Original:	
Interest Calculation:		LTV Current:	
Original Balance:		CLTV Original:	
Per Diem:		CLTV Current:	
Payment Amount:		Assumable:	No
Payoff Amount:		Assumable Date:	
Payoff Good Through:		Assumable Term:	
Paid In Full:		Assumed:	No
Total Amount Due:		Assumed Date:	
Late Charge Balance:		Payment History:	
Suspense Balance:		Product:	
Interest Rate Original:		Priority:	0
Late Charge Amount:		Neg. Amortization:	No
Corp. Adv. Balance:		Neg. Amortization Cap:	
Escrow Balance:		Grace Period Days:	
Principal:		Accel. Pymt. Program:	No
Interest:		PITI:	
Taxes:		Stop Codes:	

Insurance:	
Current Beneficiary:	
Original Beneficiary:	
Created Date:	5/24/2013 10:41 PM
Created Person:	DEPRECATED - Administrator
Updated Date:	10/4/2018 5:20 PM
Updated Person:	testattorney2@quandis.com

[!\[\]\(e765c80cf446752d57bd3eb8032636a0_img.jpg\) Edit](#)

6.3 REPROJECTING A TASK

Tasks cannot be reprojected to a past date. For example, the current date is July 1, 2018; the Projected Date must be greater than July 1, 2018. If you enter a date that is less than the current date, you will receive the following error message:

Tasks cannot be reprojected to a past date

PLEASE NOTE: Your screens may slightly differ from what is below.

1. Click on task name hyperlink

Foreclosure Tasks (include Projections)						
Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date
	Status				Days to Completion	Updated By
File Received	Attorney Step Complete	7/24/2018	7/23/2018	7/23/2018	0	7/23/2018 aangle@quandis.com
Record Notice of Default	Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018	-4	7/23/2018 aangle@quandis.com
Posting and Publishing of Sale/NOS Mailings	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018	-104	7/23/2018 aangle@quandis.com
Sale Scheduled	Attorney Step Complete	11/6/2018	11/5/2018	7/23/2018	-105	7/23/2018 aangle@quandis.com
Sale Held	Attorney Step Started	11/30/2018	8/16/2018			
Deed Recorded	Attorney Step	12/3/2018	8/19/2018			

2. Task opens in Edit mode (your screen may slightly differ from below).

- Enter the date the task is expected to be completed in the Projected Date field.
- Enter commentary in the Body field.

Tasks Holds (0)

Sale Scheduled

Task:	Sale Scheduled	Start:	7/23/2018	
Description:	Sale Scheduled	Completion:	11/6/2018	Estimated
Date of Sale:	7/25/2018		11/8/2018	Projected
Comments:	Sale Scheduled updated on 7/23/2018. Projected Completion date was changed from 11/5/2018 to 11/08/2018. Actual Completion date was changed from 7/23/2018 to 07/23/2018			
↓ Documents :	<input type="button" value="Browse"/> <input type="text"/> Drag-and-drop documents here to link to this task.			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>				

3. Click Save.

Tasks Holds (0)

Sale Scheduled

Task:	Sale Scheduled	Start:	7/23/2018
Description:	Sale Scheduled	Completion:	11/6/2018 Estimated
Date of Sale:	7/25/2018		11/8/2018 Projected
Comments:	Sale Scheduled updated on 7/23/2018. Projected Completion date was changed from 11/5/2018 to 11/08/2018. Actual Completion date was changed from 7/23/2018 to 07/23/2018		
↓ Documents :	<input type="button" value="Browse"/> <input type="text"/> Drag-and-drop documents here to link to this task.		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

4. The projected date has been updated.

Tasks (6) Holds (0)

Foreclosure Tasks (include Projections)

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All	
							Updated By	
File Received	Attorney Step Complete	7/24/2018	7/23/2018	7/23/2018	0	7/23/2018	aangle@quandis.com	<input type="checkbox"/>
Record Notice of Default	Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018	-4	7/23/2018	aangle@quandis.com	<input type="checkbox"/>
Posting and Publishing of Sale/NOS Mailings	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018	-104	7/23/2018	trottuser8@quandis.com	<input type="checkbox"/>
Sale Scheduled	Attorney Step Complete	11/6/2018	11/8/2018	7/23/2018	2 time(s) for 3 day(s) -105	7/23/2018	trottuser8@quandis.com	<input type="checkbox"/>
Sale Held	Attorney Step Started	11/30/2018	8/16/2018		16 time(s) for 0 day(s)	7/23/2018	trottuser8@quandis.com	<input type="checkbox"/>
Deed Recorded	Attorney Step	12/3/2018	8/19/2018					

All 8 records shown. 25 rows per page (0.243 seconds)

Sale Scheduled date cannot be projected more than 360 days from the existing projected date*

6.4 REPROJECTING FORECLOSURE SALE HELD TASK

PLEASE NOTE: Your screens may slightly differ from what is below.

Reprojecting the Foreclosure Sale Held Task now requires a reason for the reparation.

1. Click on the Foreclosure Sale Held hyperlink.

Tasks (7)		Holds (2)									
Foreclosure Tasks											
Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All	Status	Days to Completion	Updated By	
Foreclosure File Received	Attorney Step	3/28/2014		10/4/2018		1037					
Complaint Filed	Attorney Step	8/25/2014		10/4/2018		0					
Service of Process Completed	Attorney Step	12/28/2014		10/4/2018		0					
Default Filed	Attorney Step	2/26/2015		10/4/2018		0					
Judgment Entered / Writ of Execution	Attorney Step	8/30/2015		10/4/2018		0					
Sale Scheduled	Attorney Step	11/3/2015		10/4/2018		0					
Foreclosure Sale Held	Attorney Step	12/18/2015				0					

All 7 records shown. 25 rows per page (0.104 seconds)

2. Enter the date the task is expected to be completed in the Projected Date field. As with all other task reprojections, this date must be in the future.

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Freddie Mac

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Tasks Holds

Foreclosure Sale Held

Task: Foreclosure Sale Held Description: Foreclosure Sale Held

Please enter Bid and Sale information below

Start: 10/4/2018 Completion: 12/18/2015 Estimated
10/06/2018 Projected
10/04/2018 Actual

Opening Bid Amount: 150,000 Credit Bid Amount: 10,000 Credit Bid Received: 10/04/2018

Sale Amount: 95 Loan UPB Amount: 200,000 Total Debt: 130,000

Deficiency Status: Preserved Sold To Name: Back to Beneficiary

Comments: Comment

↓ Documents : Browse Drag-and-drop documents here to link to this task.

Save Cancel

3. The Projected Completion Date is now populated in the Tasks panel.

Tasks (8)		Holds									
Foreclosure Tasks											
Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All	Status	Days to Completion	Updated By	
Foreclosure File Received	Attorney Step	3/28/2014		10/4/2018		1037					
Complaint Filed	Attorney Step	8/25/2014		10/4/2018		0					
Service of Process Completed	Attorney Step	12/28/2014		10/4/2018		0					
Default Filed	Attorney Step	2/26/2015		10/4/2018		0					
Judgment Entered / Writ of Execution	Attorney Step	8/30/2015		10/4/2018		0					
Sale Scheduled	Attorney Step	11/3/2015	10/6/2018	10/4/2018		0					
Foreclosure Sale Held	Attorney Step	12/18/2015	10/6/2018	10/4/2018		0					
Deed Recorded	Attorney Step	1/17/2016	11/3/2018		1 time(s) for 0 day(s)	0					

All 8 records shown. 25 rows per page (0.119 seconds)

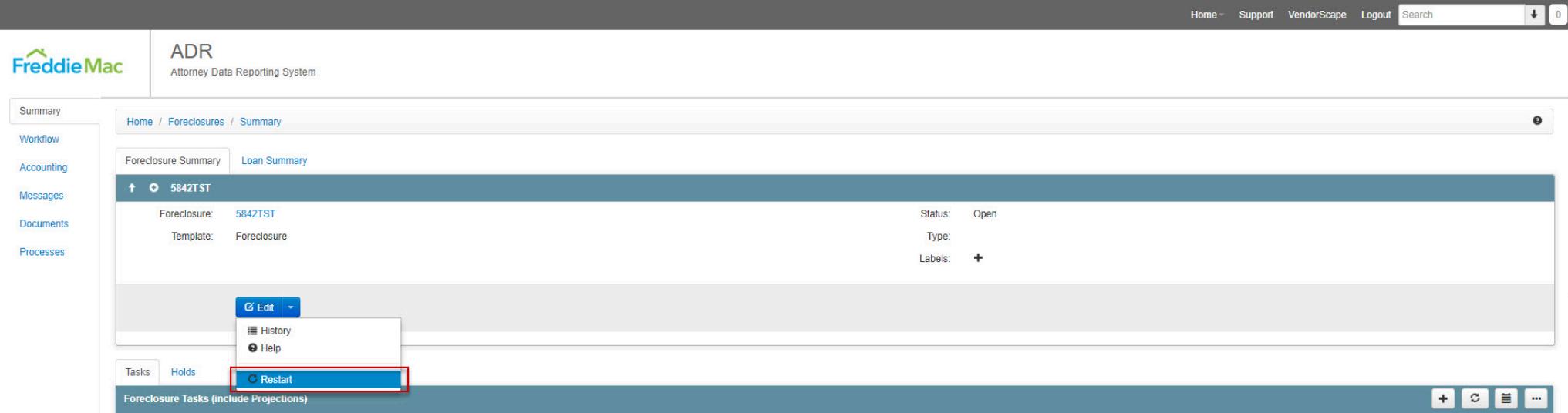
6.5 BULK UPDATING TASKS

The ability to bulk update Tasks is now available in the production environment. These are the step-by-step instructions:

1. Run the ADR – Case Load Next Task Due report
2. Add two columns to the far right, ensuring that all other columns remain untouched. These columns will be titled “ActualCompletion” and “ProjectedCompletion”, as shown [here \[http://www.quandis.com/wp-content/uploads/2016/09/BulkUpdateSampleSpreadsheet.xlsx\]](http://www.quandis.com/wp-content/uploads/2016/09/BulkUpdateSampleSpreadsheet.xlsx).
 1. You will likely need to sort and filter the spreadsheet before adding the columns and projections/completions. If you do, make sure the entire spreadsheet is sorted, so none of the ID columns get misaligned with the rest of the data. This is very important, as misalignment of the data will lead to incorrect Tasks being updated.
3. The rules for the dates that you’ll enter in these columns follow the same rules as if you were entering them from the front end, i.e. can’t complete a Task in the future, can’t project a Task in the past, etc. You will also find that Tasks that require additional data to be entered when completing also cannot be updated using this function. Examples of this are Complaint Filed (requires Court Case Number) and Sale Held (requires sale and bidding information).
4. Once you’ve entered all of your projection and completion dates to the additional columns, save it to your desktop (or some other location on your machine that you’ll remember)
5. Navigate to Home >> Import Files and in the panel on the left, labeled Import Dashboard, you’ll select Bulk Task Updates
Note: You may need to change the view from “By Template” to “By Setup” and uncheck the ‘Show Active’ filter for the ‘Bulk Task Updates’ Template to appear . Both of these options are found within the ‘...’ icon options menu (left Dashboard Panel).
6. Drag and drop the file from the location you chose into the blue bar and ensure it appears in the panel below it.
7. Refresh the lower panel until it reaches a terminal status (Complete or Error).
 1. If it lands at an error, contact support@quandis.com [mailto:adr.support@quandis.com] for further assistance.
 2. If it lands at Complete, you can click on the link in the Import File column, then select the Logging tab to review the update operations. If there are any errors, you can click on the error message and it will tell you why it failed (i.e. business rules such as future dates being used for completion). You can either correct those from the front end by navigating to each individual case or correct them within the spreadsheet and resubmit those rows.
8. Validate the updates are accurate by navigating to a subset of the cases and reviewing their Projected and Actual Completion Dates

7 RESTART FORECLOSURE PROCESS

If a Foreclosure needs to be restarted for any reason, you may choose to close the file out (see Section 8) and open a new file, or you can use the Restart function.



ADR
Attorney Data Reporting System

Summary Workflow Accounting Messages Documents Processes

Home / Foreclosures / Summary

Foreclosure Summary Loan Summary

↑ 5842TST

Foreclosure: 5842TST Status: Open
Template: Foreclosure Type:
Labels: +

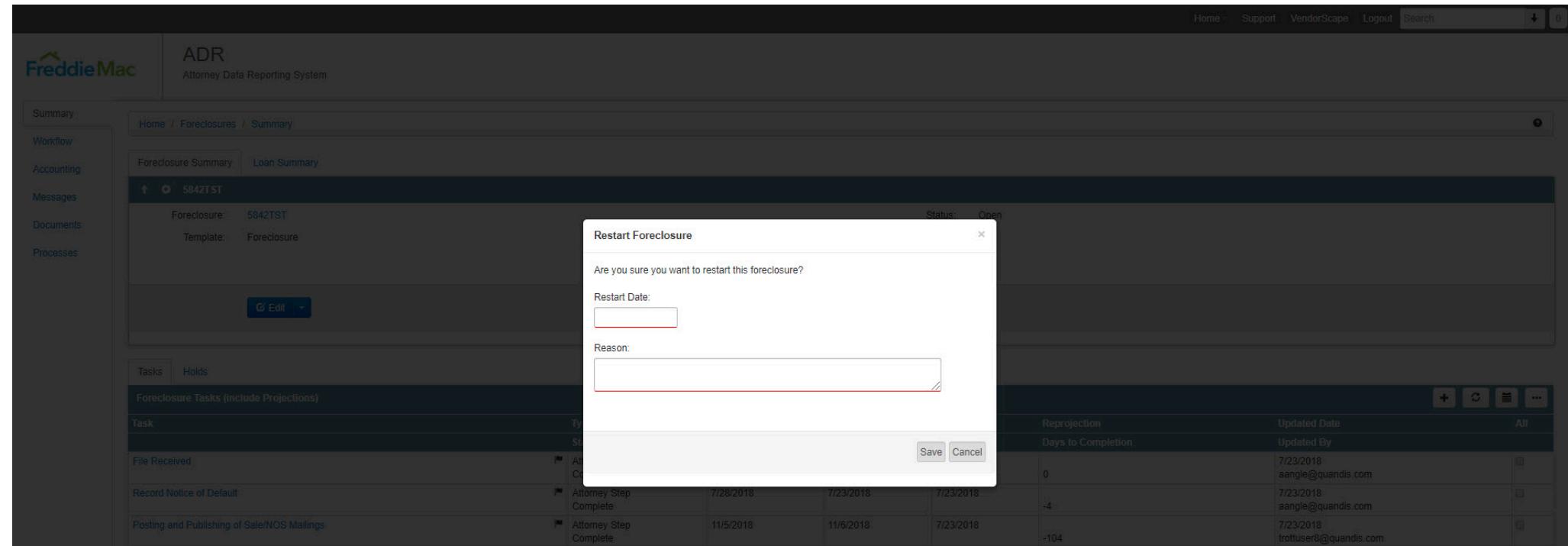
Edit History Help

Tasks Holds

Restart

Foreclosure Tasks (include Projections)

1. From the Foreclosure Summary panel, mouse over the dropdown menu next to the "Edit" button and select "Restart"



ADR
Attorney Data Reporting System

Summary Workflow Accounting Messages Documents Processes

Home / Foreclosures / Summary

Foreclosure Summary Loan Summary

↑ 5842TST

Foreclosure: 5842TST Status: Open
Template: Foreclosure Type:
Labels: +

Edit History Help

Tasks Holds

Foreclosure Tasks (include Projections)

Restart Foreclosure

Are you sure you want to restart this foreclosure?

Restart Date:

Reason:

Save Cancel

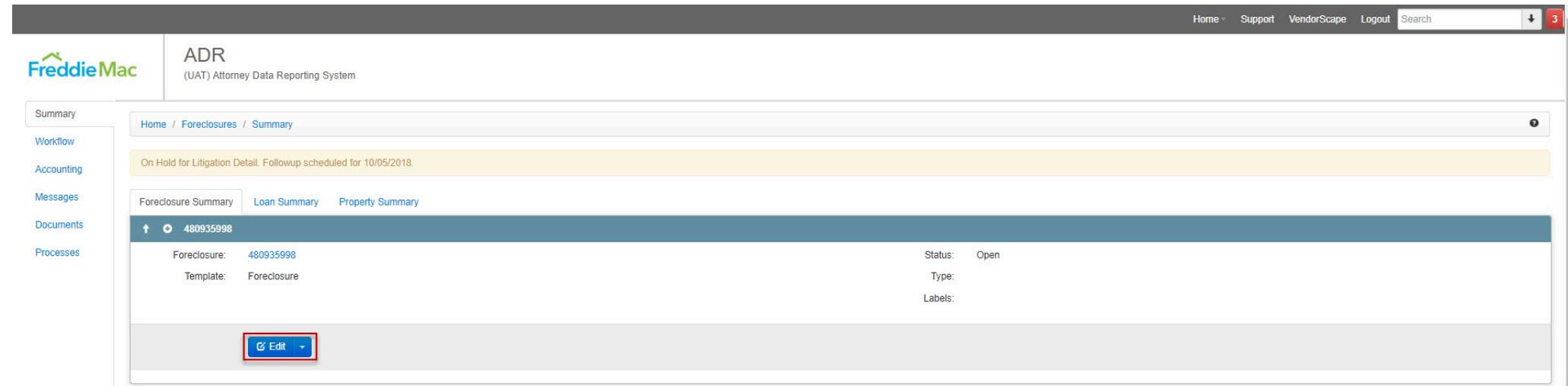
Task	Type	Start Date	End Date	Reprojection	Updated Date	Updated By
File Received	Attorney Step Complete	7/28/2018	7/23/2018	7/23/2018	0	7/23/2018 aangle@quandis.com
Record Notice of Default	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018	-4	7/23/2018 aangle@quandis.com
Posting and Publishing of Sale/NOS Mailings	Attorney Step Complete	11/5/2018	11/6/2018	7/23/2018	-104	7/23/2018 trottuser8@quandis.com

2. In the popup window, enter the new/correct Start Date in the Restart Date field, and provide the reason for the Restart, then click "Save".
3. The Foreclosure Start Date will be set to the Restart Date provided, and a new Timeline will be launched, allowing the Restart Date to be used as the Foreclosure File Received Task's Completion Date. A Message will also be created, for auditing purposes.

8 CLOSING THE FORECLOSURE

8.1 HOW TO CLOSE A FORECLOSURE

If a Foreclosure has gone to sale, has been opened in error, or you've been instructed that the file should not be open for any other reason (i.e. Servicer Request), the file will need to be closed. If an incorrect Start Date was entered, you may also choose to close the file out to allow a new file to be opened, or Restart it (see Section 7).



The screenshot shows the Freddie Mac ADR (UAT) Attorney Data Reporting System. The left sidebar has tabs for Summary, Workflow, Accounting, Messages, Documents, and Processes. The main content area shows a breadcrumb path: Home / Foreclosures / Summary. A yellow banner at the top states: "On Hold for Litigation Detail. Followup scheduled for 10/05/2018." Below this, the Foreclosure Summary tab is selected, showing file number 480935998. The details pane shows: Foreclosure: 480935998, Status: Open, Template: Foreclosure, Type:, and Labels:. At the bottom of the details pane is a blue "Edit" button, which is highlighted with a red box.

1. To close a file, choose the Foreclosure Summary tab, and select "Edit", as highlighted below.

Summary
Workflow
Accounting
Messages
Documents
Processes

Home / Foreclosures / Summary



On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Foreclosure Summary Loan Summary Property Summary

480935998

Foreclosure:	480935998	Status:	Closed
Template:	Foreclosure	Type:	
Court:	--	Deficiency Status:	Preserved
Case Number:	3242354	Opening Bid Amount:	
Scheduled Sale Date:		Surplus Funds:	
Sale Date Type:	--	Redemption Date:	
Sale Date Status:	--	Redemption Amount:	
Sale Amount:	\$95.00	Sub Trustee:	--
Sold To Name:	Back to Beneficiary	Trustee Guarantee #:	
Plaintiff:			
Defendant:			
FC The Name Of:			
Vesting Name Of:			
Judge:	Name Address City -- ZIP Code Phone Email	Auction:	Name Address City -- ZIP Code Phone Email
Sale Location:	Name Address City -- ZIP Code Phone Email	Third Party:	Name Address City -- ZIP Code Phone Email
Assigned Org.:	Stern & Eisenberg, PC - NJ	Date Opened:	03/27/2014
Assigned Person:	--	Opened Reason:	--
		Date Due:	
		Priority:	
		Date Closed:	10/04/2018
		Closed Reason:	Opened In Error
Servicer:	VPC OCWEN LOAN SERVICING (C)		
Borrower:			

Servicer Loan ID: 2200080957

Lien Priority Type: --

Loan Type: --

Original Balance: 500,000

UPB Amount: 200,000

Deed of Trust

Filing Date:

Recording Date:

Property

Address: 116 SOMERS AVE

City: BERGENFIELD

State: NJ

Postal Code: 07621

First Name: Jane

Last Name: Flower

SSN: XXX-XX-XXXX

Co-Borrower: Yes No

Save Cancel

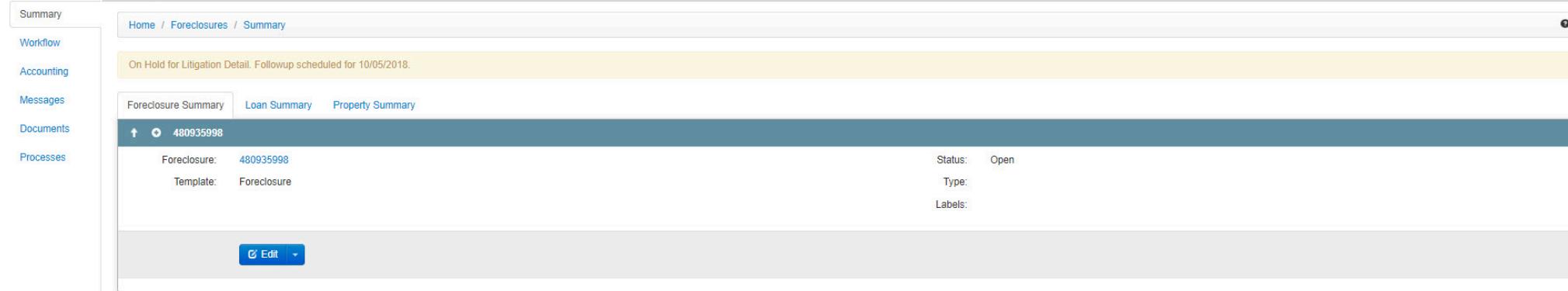
2. The Status will need to be set to "Closed", and a "Closed Date" and a "Closed Reason" will need to be chosen.

NOTE: IF THE FORECLOSURE HAS GONE TO SALE, THE SALE DATE WILL NEED TO BE ENTERED (as seen below the Status dropdown box).

3. Once all required fields are entered, choose "Save" (the blue button in the bottom left), and the File has now been closed, leaving you with the option to open a new Foreclosure if needed.

Note:

- The system will provide you with a prompt if the required fields are not completed when trying to close the file.
- You may also be required to upload Required Documents in order to close the file.
- If Required Documents are required, the system will alert you prior to closing the file. You can see the Required Documents by accessing the **Red Notification Button icon** in the top right, which will reflect a number of items that require your attention.
- **If the UPB and Original Balance was not supplied when the case was created (prior to the Direct Title Pilot Go-Live), the fields will be required upon closing the file.**



Summary

Workflow

Accounting

Messages

Documents

Processes

Home / Foreclosures / Summary

On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Foreclosure Summary Loan Summary Property Summary

↑ 480935998

Foreclosure: 480935998 Status: Open
Template: Foreclosure Type:
Labels:

[Edit](#)

8.1.2 CLOSING A FORECLOSURE THAT HAS GONE TO SALE

Closing a file that has gone to sale requires that the Sale Held task be completed within the Foreclosure Tasks list first, which will often be the final task to complete. Once this task has been completed, Sale information will be populated in the Foreclosure Summary panel (the same location where you would close a file).

After the Sale Held Task has been completed, you will follow the previous steps regarding the closing of the Foreclosure File and choose "Case Completed" or "Third Party Sale Completed" as the Closed Reason.

8.1.2.1 CLOSE REASON FOR A FORECLOSURE THAT HAS GONE TO SALE

NOTE: Your screen may look different than what is shown below. However, you should be able to close the file based on previous instructions regarding how to close a file.

1. Enter 'Date Closed' for the Foreclosure that has gone through Sale and update the 'Status' to Close.

Summary

Activity

Processes

Borrowers (2) Loan Data Related Loans (0)

Borrowers

Borrower

Loan Number

Property Address

Mailing Address

Phone

Type

Labels

All

SSN

City

State

Postal Code

City

State

Postal Code

Email

Status

Donna Schmidt
XXX-XX-8639

483411981

403 RT 47 S
GREEN CREEK, NJ 08219403 Route 47 South
Green Creek, NJ 08219

Primary

All 2 records shown. 25 rows per page

(0.462 seconds)

Bankruptcies (0) Bid At Sales (0) Deficiencies (0) Foreclosures Titles (0) Valuations (0) Processes (0)

139875-R1

Foreclosure: 139875-R1

Status: Closed

Template: Foreclosure

Type: --

Court: --

Deficiency Status: --

Case Number: F-000902-14

Opening Bid Amount:

Scheduled Sale Date:

Surplus Funds:

Sale Date Type: --

Redemption Date:

Sale Date Status: --

Redemption Amount:

Sale Amount:

Sub Trustee: --

Sold To Name: --

Trustee Guarantee #:

Plaintiff:

Defendant:

FC The Name Of:

Vesting Name Of:

Judge: Name

Auction: Name

Address

Address

City

City

--

--

ZIP Code

ZIP Code

Phone

Phone

Email

Email

Sale Location: Name

Third Party: Name

Address

Address

City

City

--

--

ZIP Code

ZIP Code

<input type="text" value="Phone"/>	<input type="text" value="Email"/>
<input type="text" value="Assigned Org.: Stern & Eisenberg, PC - NJ"/>	<input type="text" value="Date Opened: 1/31/2013"/>
<input type="text" value="Assigned Person: --"/>	<input type="text" value="Opened Reason: --"/>
	<input type="text" value="Date Due: --"/>
	<input type="text" value="Priority: --"/>
	<input type="text" value="Date Closed: 10/05/2018"/>
	<input type="text" value="Closed Reason: --"/>
<input type="text" value="Servicer: CALIBER HOME LOANS, INC."/>	<input type="text" value="Borrower: --"/>
<input type="text" value="Servicer Loan ID: 0009801221533"/>	<input type="text" value="First Name: Case Completed"/>
<input type="text" value="Lien Priority Type: 1"/>	<input type="text" value="Last Name: Charge Off Completed"/>
<input type="text" value="Loan Type: --"/>	<input type="text" value="SSN: Consent Judgment"/>
<input type="text" value="Original Balance: --"/>	<input type="text" value="Change SSN: Investor Loan Sold"/>
<input type="text" value="UPB Amount: --"/>	<input type="text" value="Co-Borrower: Investor Request"/>
<input type="text" value="Deed of Trust: --"/>	<input type="text" value="First Name: Loss Mitigation Completed"/>
<input type="text" value="Filing Date: --"/>	<input type="text" value="Last Name: Low Balance Loan"/>
<input type="text" value="Recording Date: --"/>	<input type="text" value="SSN: Opened In Error"/>
<input type="text" value="Property: --"/>	<input type="text" value="Change SSN: Paid Off / Reinstated"/>
<input type="text" value="Address: 403 RT 47 S"/>	<input type="text" value="Co-Borrower: Repurchased"/>
<input type="text" value="City: GREEN CREEK"/>	<input type="text" value="First Name: Servicer Request"/>
<input type="text" value="State: NJ"/>	<input type="text" value="Last Name: Third Party Sale Completed"/>
<input type="text" value="Postal Code: 08219"/>	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

2. Select either Case Complete or Third Party Sale Completed from 'Closed Reason' drop-down menu.

8.2 ADDING REQUIRED DOCUMENTS

Freddie Mac has identified specific states wherein a deficiency will be pursued. You can view which documents are required via the Required Documents tab in the Support drop-down. You can also view which documents are required on loan level by reviewing the Priority message. NOTE: This only applies when the Removal Reason being set is either "Case Completed" or "Third Party Sale Completed".

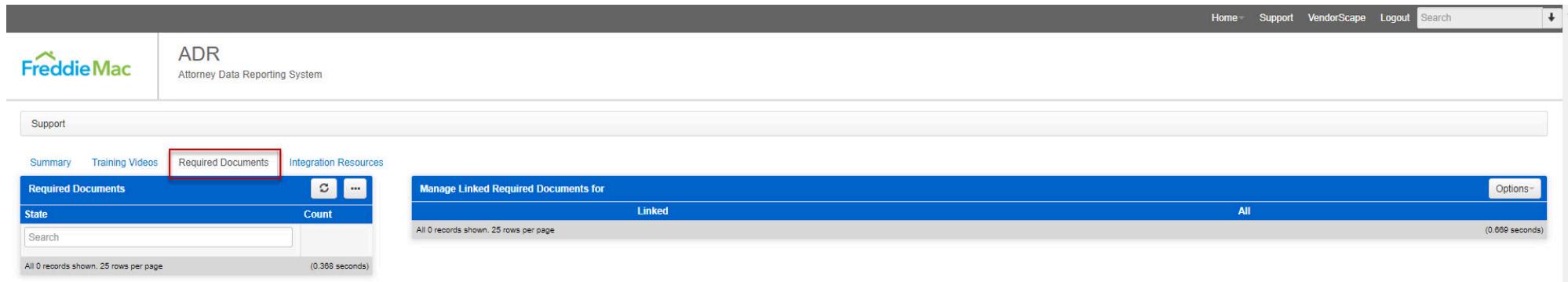
8.2.1 REQUIRED DOCUMENT LIST

1. Click on Support.



The screenshot shows the ADR (Attorney Data Reporting System) interface. The top navigation bar includes links for Home, Support (which is highlighted with a red box), VendorScape, Logout, and a search bar. The main content area features the Freddie Mac logo and the ADR Attorney Data Reporting System title. Below this, a breadcrumb navigation shows Home / Foreclosures / Summary. A sidebar on the left has tabs for Summary and Workflow, with Summary currently selected.

2. Click on the Required Documents tab.



The screenshot shows the ADR interface with the Support tab selected in the top navigation bar. The main content area displays the 'Required Documents' tab, which is highlighted with a red box. Below this, there are sections for 'Required Documents' and 'Manage Linked Required Documents for'. The 'Required Documents' section includes a search bar and a note indicating 0 records shown. The 'Manage Linked Required Documents' section shows a table with columns for 'Linked' and 'All', both of which show 0 records.

3. The first page of states and territories is presented.

Support

Summary Training Videos Required Documents Integration Resources

Required Documents

State	Count
Search	
AK	0
AL	4
AR	5
AZ	0
CA	0
CO	6
CT	5
DC	5
DE	6
FL	6
GA	0
GU	0
HI	6
IA	0
ID	0
IL	5
IN	6
KS	5
KY	6
LA	6
MA	5
MD	6
ME	6
MI	4
MN	0

54+ records: showing page 1 of 3, 25 rows per page. Go to page 1 2 3. (1.488 seconds)

Manage Linked Required Documents for

Linked	All
All 0 records shown. 25 rows per page	(1.366 seconds)

4. Expand list of states by selecting '25 rows per page' and updating the row count in the form.

Support

Summary Training Videos Required Documents Integration Resources

Required Documents

State	Count
Search	
AK	0
AL	4
AR	5
AZ	0
CA	0
CO	6
CT	5
DC	5
DE	6
FL	6
GA	0
GU	0
HI	6
IA	0
ID	0
IL	5
IN	6
KS	5
KY	6
LA	6
MA	5
MD	6
ME	6
MI	4
MN	0

54+ records: showing page 1 of 3 [25 rows per page](#) Go to page 1 2 3. (1.488 seconds)

uatadr.quandis.net says

Rows per page:

60

OK

Cancel

Manage Linked Required Documents for

Linked

All

All 0 records shown. 25 rows per page

(1.366 seconds)

5. Once you have located your state, click on the state hyperlink. In this example, Connecticut was selected.

6. In the below example, there are 5 documents that are required.

ADR (UAT) Attorney Data Reporting System

Support

Summary Training Videos Required Documents Integration Resources

Required Documents

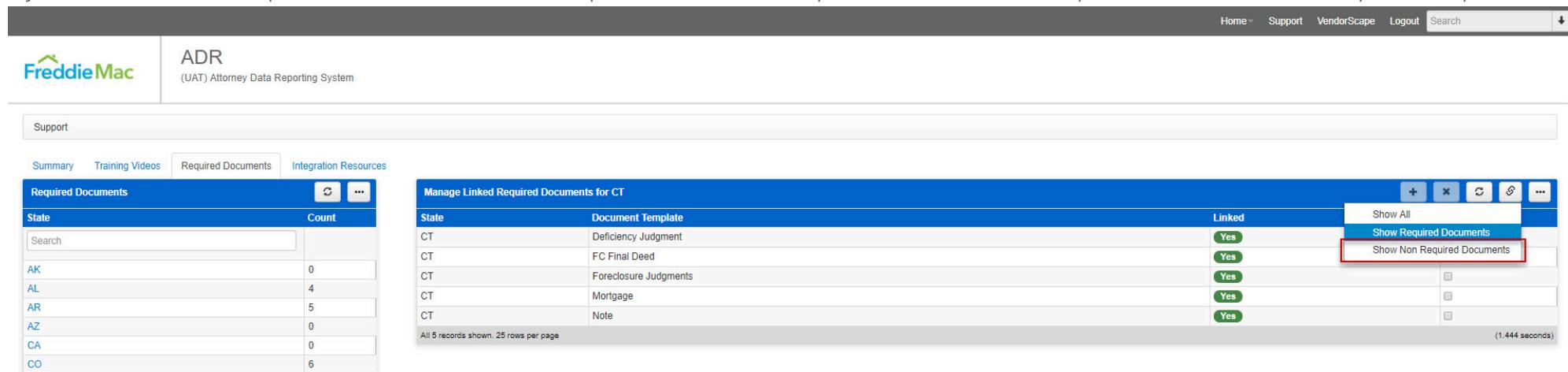
State	Count
Search	
AK	0
AL	4
AR	5
AZ	0
CA	0
CO	6

Manage Linked Required Documents for CT

State	Document Template	Linked	All
CT	Deficiency Judgment	Yes	<input type="checkbox"/>
CT	FC Final Deed	Yes	<input type="checkbox"/>
CT	Foreclosure Judgments	Yes	<input type="checkbox"/>
CT	Mortgage	Yes	<input type="checkbox"/>
CT	Note	Yes	<input type="checkbox"/>

All 5 records shown. 25 rows per page (1.444 seconds)

7. If you would like to view all possible documents that can be uploaded, but are not required, select Show Non Required documents from the 'Options' Drop-down.



ADR
(UAT) Attorney Data Reporting System

Support

Summary Training Videos Required Documents Integration Resources

Required Documents

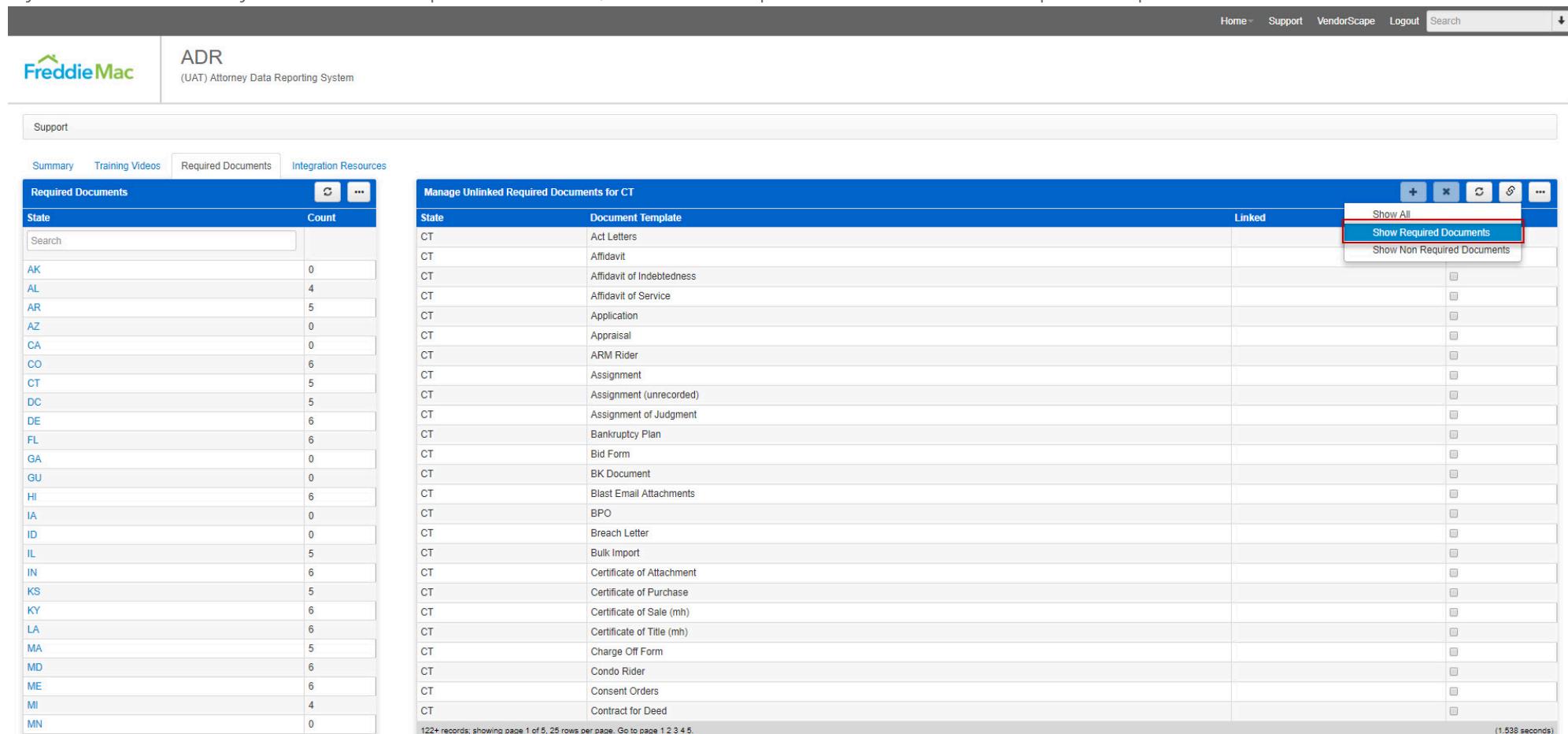
State	Count
Search	
AK	0
AL	4
AR	5
AZ	0
CA	0
CO	6

Manage Linked Required Documents for CT

State	Document Template	Linked	Options
CT	Deficiency Judgment	Yes	Show All Show Required Documents Show Non Required Documents
CT	FC Final Deed	Yes	
CT	Foreclosure Judgments	Yes	
CT	Mortgage	Yes	
CT	Note	Yes	

All 5 records shown. 25 rows per page (1.444 seconds)

8. If you would like to limit your view to the Required Documents, select Show Required Documents from the Options drop-down.



ADR
(UAT) Attorney Data Reporting System

Support

Summary Training Videos Required Documents Integration Resources

Required Documents

State	Count
Search	
AK	0
AL	4
AR	5
AZ	0
CA	0
CO	6
CT	5
DC	5
DE	6
FL	6
GA	0
GU	0
HI	6
IA	0
ID	0
IL	5
IN	6
KS	5
KY	6
LA	6
MA	5
MD	6
ME	6
MI	4
MN	0

Manage Unlinked Required Documents for CT

State	Document Template	Linked	Options
CT	Act Letters		Show All Show Required Documents Show Non Required Documents
CT	Affidavit		
CT	Affidavit of Indebtedness		
CT	Affidavit of Service		
CT	Application		
CT	Appraisal		
CT	ARM Rider		
CT	Assignment		
CT	Assignment (unrecorded)		
CT	Assignment of Judgment		
CT	Bankruptcy Plan		
CT	Bid Form		
CT	BK Document		
CT	Blast Email Attachments		
CT	BPO		
CT	Breach Letter		
CT	Bulk Import		
CT	Certificate of Attachment		
CT	Certificate of Purchase		
CT	Certificate of Sale (mh)		
CT	Certificate of Title (mh)		
CT	Charge Off Form		
CT	Condo Rider		
CT	Consent Orders		
CT	Contract for Deed		

54+ records; showing page 1 of 3, 25 rows per page. Go to page 1 2 3. (1.488 seconds)

122+ records; showing page 1 of 5, 25 rows per page. Go to page 1 2 3 4 5. (1.533 seconds)

9. To export the list of documents into an excel spreadsheet, select Export to CSV or Excel from the 'Ellipsis' drop-down.

Required Documents

State	Count
AK	0
AL	4
AR	5
AZ	0
CA	0
CO	6
CT	5
DC	5
DE	6
FL	6
GA	0

Manage Unlinked Required Documents for CT

State	Document Template	Linked
CT	Act Letters	<input type="checkbox"/>
CT	Affidavit	<input type="checkbox"/>
CT	Affidavit of Indebtedness	<input type="checkbox"/>
CT	Affidavit of Service	<input type="checkbox"/>
CT	Application	<input type="checkbox"/>
CT	Appraisal	<input type="checkbox"/>
CT	ARM Rider	<input type="checkbox"/>
CT	Assignment	<input type="checkbox"/>
CT	Assignment (unrecorded)	<input type="checkbox"/>
CT	Assignment of Judgment	<input type="checkbox"/>
CT	Bankruptcy Plan	<input type="checkbox"/>
CT	Bid Form	<input type="checkbox"/>

10. The spreadsheet will be formatted as follows

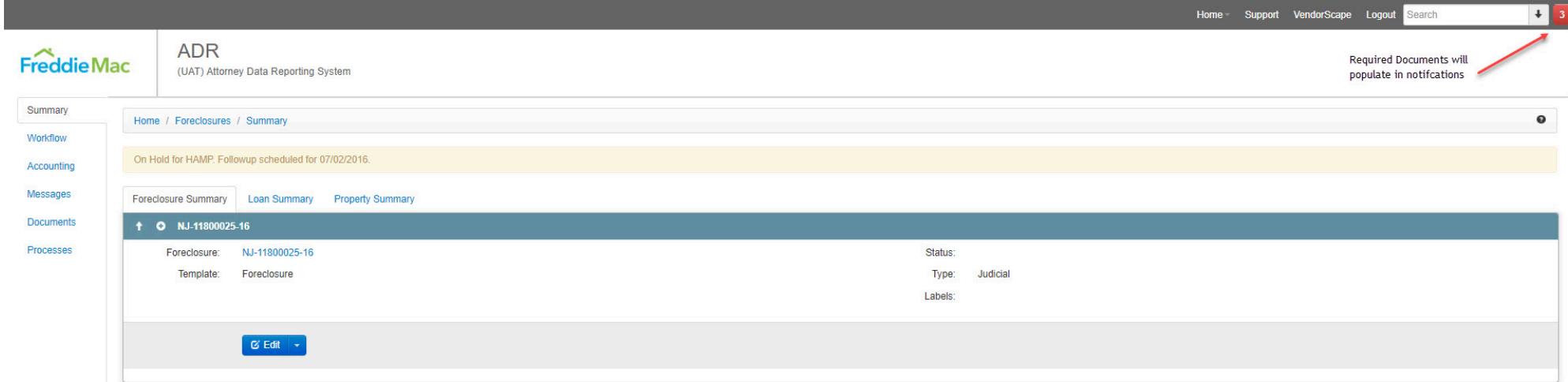
A	B	C	D	E	F	G	H	I
1	PrimaryObjectID	PrimaryObject	PrimaryObjectLabel	LinkedObject	LinkedObjectID	LinkedObjectLabel	ObjectLinkID	RecordCount
2		7 State	CT	AttachmentTemplate	1	Act Letters		122
3		7 State	CT	AttachmentTemplate	2	Affidavit		122
4		7 State	CT	AttachmentTemplate	130	Affidavit of Indebtedness		122
5		7 State	CT	AttachmentTemplate	132	Affidavit of Service		122
6		7 State	CT	AttachmentTemplate	3	Application		122
7		7 State	CT	AttachmentTemplate	4	Appraisal		122
8		7 State	CT	AttachmentTemplate	5	ARM Rider		122
9		7 State	CT	AttachmentTemplate	6	Assignment		122

Note: If you do not upload all required documents, you will receive the following error message whenever you try to close the foreclosure:

Required documents must be uploaded prior to closing process

8.3 PRIORITY MESSAGE

1. You can view the documents required on a per loan basis by reviewing the Priority Message.
2. Click on the Priority Message icon at the top right of the Foreclosure Summary page.



Home Support VendorScape Logout Search 3

ADR
(UAT) Attorney Data Reporting System

Summary Workflow Accounting Messages Documents Processes

Home / Foreclosures / Summary

On Hold for HAMP. Followup scheduled for 07/02/2016.

Foreclosure Summary Loan Summary Property Summary

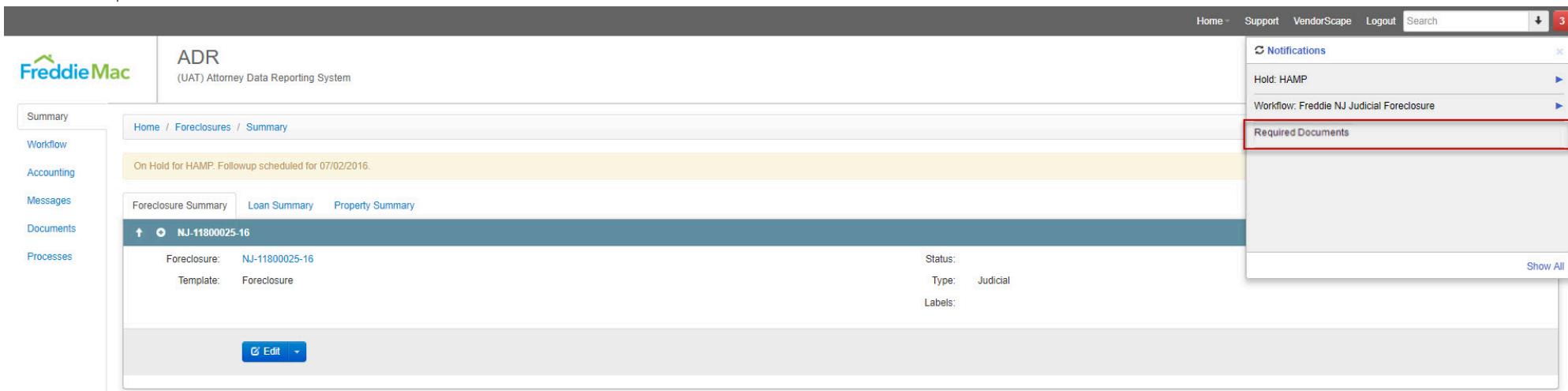
↑ NJ-1180025-16

Foreclosure: NJ-1180025-16 Status:
Template: Foreclosure Type: Judicial
Labels:

Edit

Required Documents will populate in notifications

3. Click on Required Documents



Home Support VendorScape Logout Search 3

ADR
(UAT) Attorney Data Reporting System

Summary Workflow Accounting Messages Documents Processes

Home / Foreclosures / Summary

On Hold for HAMP. Followup scheduled for 07/02/2016.

Foreclosure Summary Loan Summary Property Summary

↑ NJ-1180025-16

Foreclosure: NJ-1180025-16 Status:
Template: Foreclosure Type: Judicial
Labels:

Edit

Notifications

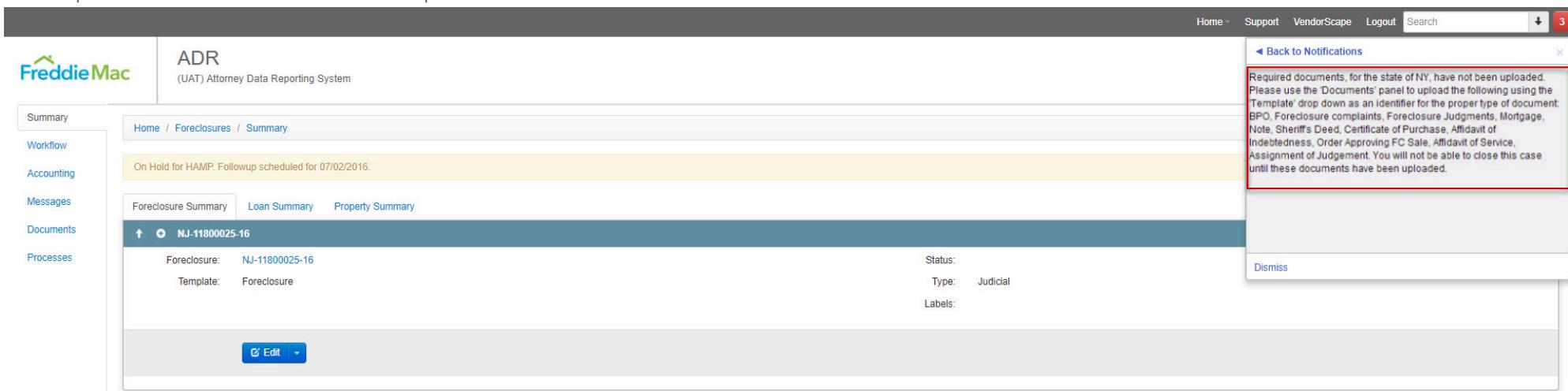
Hold: HAMP

Workflow: Freddie NJ Judicial Foreclosure

Required Documents

Show All

4. A list is presented of documents that are required.



Home Support VendorScape Logout Search 3

ADR
(UAT) Attorney Data Reporting System

Summary Workflow Accounting Messages Documents Processes

Home / Foreclosures / Summary

On Hold for HAMP. Followup scheduled for 07/02/2016.

Foreclosure Summary Loan Summary Property Summary

↑ NJ-1180025-16

Foreclosure: NJ-1180025-16 Status:
Template: Foreclosure Type: Judicial
Labels:

Edit

Back to Notifications

Required documents, for the state of NY, have not been uploaded. Please use the 'Documents' panel to upload the following using the 'Template' drop down as an identifier for the proper type of document: BPO, Foreclosure complaints, Foreclosure Judgments, Mortgage, Note, Sheriff's Deed, Certificate of Purchase, Affidavit of Indebtedness, Order Approving FC Sale, Affidavit of Service, Assignment of Judgement. You will not be able to close this case until these documents have been uploaded.

Dismiss

Note: Whenever a document is uploaded, it is removed from the priority message list. Notice the Note is listed as a required document.

******PLEASE NOTE FORMATS THAT CAN BE UPLOADED ARE PDF, .DOC and .DOCX.**

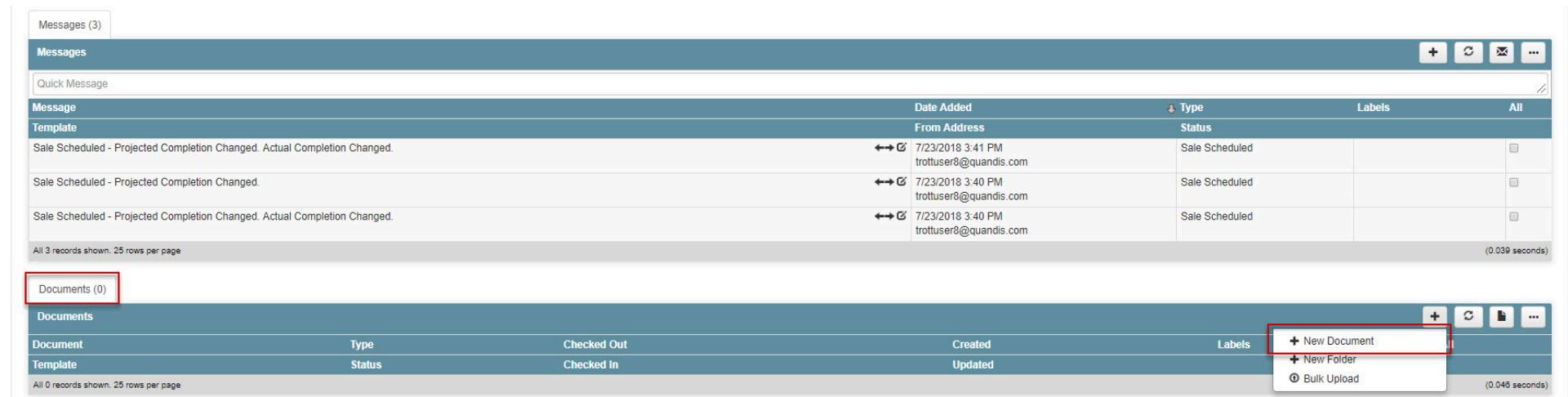
******IF YOU ARE USING IE10, CHROME OR ANY OTHER HTML5 COMPLIANT BROWERS, THE DOCUMENT SIZE IS NOT LIMITED******

******IF YOU ARE USING IE8 OR IE9. THE DOCUMENT CANNOT BE GREATER THAN 2 MB IN SIZE******

8.4 UPLOADING A DOCUMENT

1. Click on the documents tab and then click on the "+" icon on the right, followed by "+New Document"

NOTE: You may see different tabs on your screen than what is below. However, you should be able to see the Documents Tab as one of your available tabs.



The screenshot shows a software interface with two main tabs: 'Messages (3)' and 'Documents (0)'. The 'Messages' tab is currently active, displaying a list of three messages with columns for 'Message', 'Template', 'Date Added', 'From Address', 'Type', 'Status', and 'Labels'. The 'Documents' tab is also visible below it. A context menu is open on the right side of the 'Documents' tab, with the '+ New Document' option highlighted. The menu also includes '+ New Folder' and 'Bulk Upload' options.

2. Click the arrow icon or Drag-and-Drop to upload your document. Be sure to select the Template that matches what is being asked of the Required Documents section, as the Template is most important in letting the system know that you have uploaded what is needed.

Once the Required Document is uploaded, click Save and move forward.

Documents

New Document

Document:	Drag-and-drop document here	Upload	Status:	--
Template:	--		Type:	--
File Name:	Archive Scheduled:			
File Object Assembly:	Archival Date:			
Length:	Expiration Scheduled:			
Length Compressed:	Expiration Date:			
Compression:	Public Key:			
Path URL:	Private Key:			
Description:				
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Revision Control</p> <p>Owner: --</p> <p>Check Out Date: <input type="text"/></p> <p>Check Out Person: --</p> <p>Check Out Expiration: <input type="text"/></p> <p>Check In Date: <input type="text"/></p> <p>Check In Comment: <input type="text"/></p> </div> <div style="width: 45%;"> <p>Document Delivery</p> <p>Outbound Service: --</p> <p>Outbound Tracking: <input type="text"/></p> <p>Outbound Due: <input type="text"/></p> <p>Outbound Received: <input type="text"/></p> <p>Return Service: --</p> <p>Return Tracking: <input type="text"/></p> <p>Return Due: <input type="text"/></p> <p>Return Received: <input type="text"/></p> </div> </div>				
<input type="button" value="✓ Save"/> <input type="button" value="✗ Cancel"/>				

NOTE: The Template is what informs the system what document you are uploading. If you mislabel the template, even though the attachment/document you have uploaded is correct, the system will still show that this document is required. You must select the template that is reflecting the document requested- make sure this matches what is being asked as indicated by the red icon in the top right corner of the foreclosure summary page.

3. Enter description about the document being uploaded. This is not a required field.

Documents

New Document

Document: <input type="text" value="DragDrop.jpg"/>	Template: <input type="text" value="--"/>	Status: <input type="text" value="--"/>	Type: <input type="text" value="--"/>
File Name: DragDrop.jpg	File Object Assembly: AmazonS3	Length: 143468	Archive Scheduled: <input type="text"/>
Length Compressed:	Compression:	Expiration Scheduled: <input type="text"/>	Archival Date: <input type="text"/>
Path URL: /Foreclosure/5453/DragDrop.jpg	Description: <input type="text"/>	Expiration Date: <input type="text"/>	Public Key: <input type="text"/>
Revision Control		Document Delivery	
Owner: <input type="text" value="--"/>	Check Out Date: <input type="text"/>	Outbound Service: <input type="text" value="--"/>	Outbound Tracking: <input type="text"/>
Check Out Person: <input type="text" value="--"/>	Check Out Expiration: <input type="text"/>	Outbound Due: <input type="text"/>	Outbound Received: <input type="text"/>
Check In Date: <input type="text"/>	Check In Comment: <input type="text"/>	Return Service: <input type="text" value="--"/>	Return Tracking: <input type="text"/>
Return Due: <input type="text"/>			
Return Received: <input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

9 OPENING A BANKRUPTCY

All fields underlined in red are required fields.

Please note: The loan information may not be populated when you try to open the Bankruptcy. Freddie Mac provides limited loan information prior to cases being opened. Once the Bankruptcy case has been opened, the loan and property information will populate within 24 to 48 hours.

9.1 OPENING A MOTION FOR RELIEF (MRF) AND A PROOF OF CLAIM

1. Click on the Bankruptcy tab (within Loan Summary) followed by the "+" icon on the right, then either a New Motion for Relief (MFR, which is also a bankruptcy) or New Proof of Claim.



Summary

Home / Loans / Summary

Activity

Processes

Loan Summary Property Summary

↑ ● 458776602

Loan: 458776602

Status: CLOSED

Servicer: WELLS FARGO BANK, N.A.

Type:

Servicer Loan ID: 0170695183

Labels:

Edit

Borrowers (0) Loan Data Related Loans (0)

Borrowers

Borrower Loan Number

Property Address

Mailing Address

Phone

Type

Labels

All

SSN

City

State

Postal Code

City

State

Postal Code

Email

Status

All 0 records shown. 25 rows per page (0.159 seconds)

Bankruptcies (0) Bid At Sales (0) Deficiencies (0) Foreclosures (2) Titles (0) Valuations (0) Processes (0)

Bankruptcies

Case #

Servicer

Agency

Debtor

Filing State

Type

Date Opened

Date Closed

+ New Motion For Relief

All

Attorney

Loan #

Loan #

Co-Debtor

Chapter

Status

Opened Reason

Closed Reason

+ New Proof Of Claim

(0.145 seconds)

2. The necessary fields to properly open a Bankruptcy (MFR) or a Proof of Claim are as follows:

- Bankruptcy
- State of Filing
- Filing Date
- Court
- Case Number
- Chapter
- Status
- Date Opened

New Bankruptcy

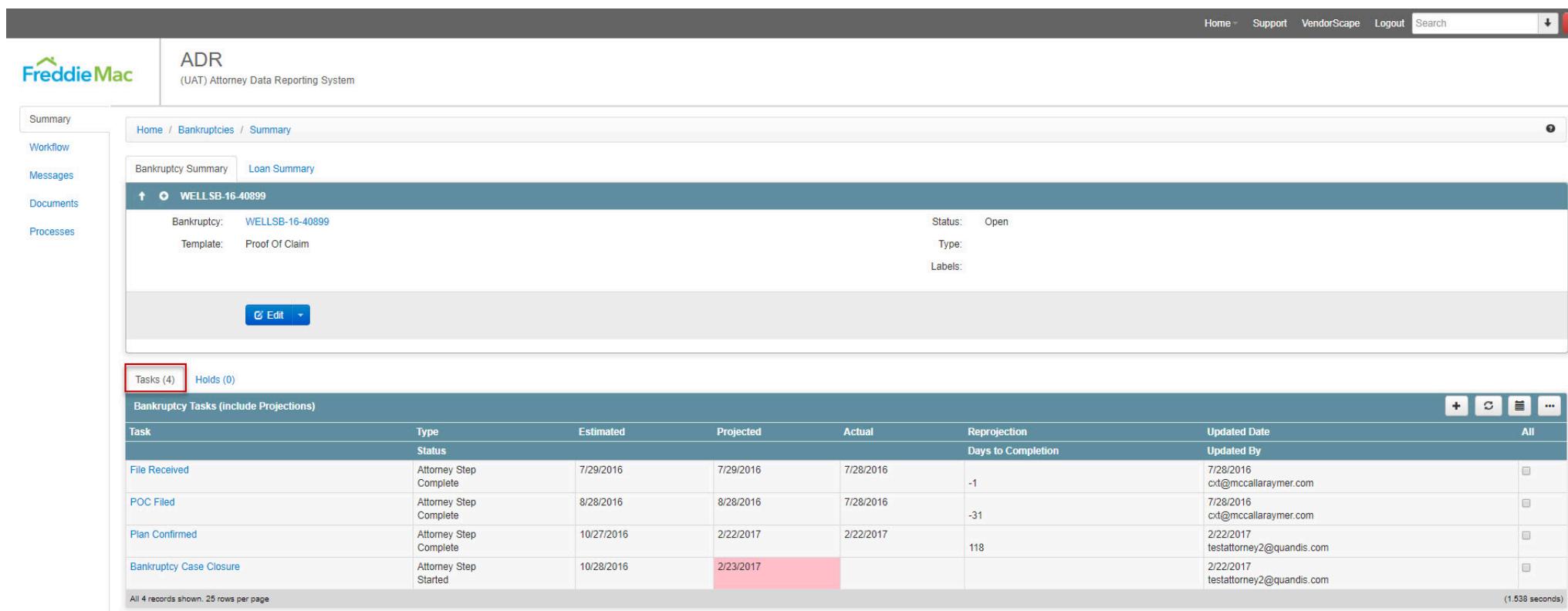
Bankruptcy:	Status:
State Of Filing:	Type:
Filing Date:	Disposition:
Court:	Dismissed:
Case #:	Discharged:
Case URL:	Converted:
Chapter:	Reopened:
Asset:	Confirmation Hearing:
<input type="radio"/> Yes	Transferred:
<input type="radio"/> No	Pre Paid:
Cramdown:	Lien Strip Flag:
<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No
POC Filed Date:	Source Of Funds Code:
Bar Date:	
Post Petition Date:	
Debtor Attorney:	Trustee:
Name	Name
Address	Address
City	City
--	--
ZIP Code	ZIP Code
Phone	Phone
Email	Email
Assigned Org.:	Date Opened:
Assigned Person:	Opened Reason:
--	--
--	Date Due:
	Priority:
	Date Closed:
	Closed Reason:
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

These fields listed above are required, however, please be sure to fill out any additional section that may apply, or if you have that information that can be entered such as the Atty Case # and your Firm Name, both of which can be found on the top right hand side.

Once the above is completed, click the blue "Save" button, and the Bankruptcy or Proof of Claim will now be open. If you are missing something that is required, an alert will appear on this screen informing you what else is needed before the file can be successfully opened.

10 COMPLETING BANKRUPTCY TASKS

The due date for the first task is based on the start date entered when the bankruptcy was opened. If an error was made in entering the start date, you will need to close the bankruptcy and open a new one. Please refer to the [Closing the Bankruptcy](#) [#closing-a-bankruptcy] section for instructions on closing a bankruptcy.

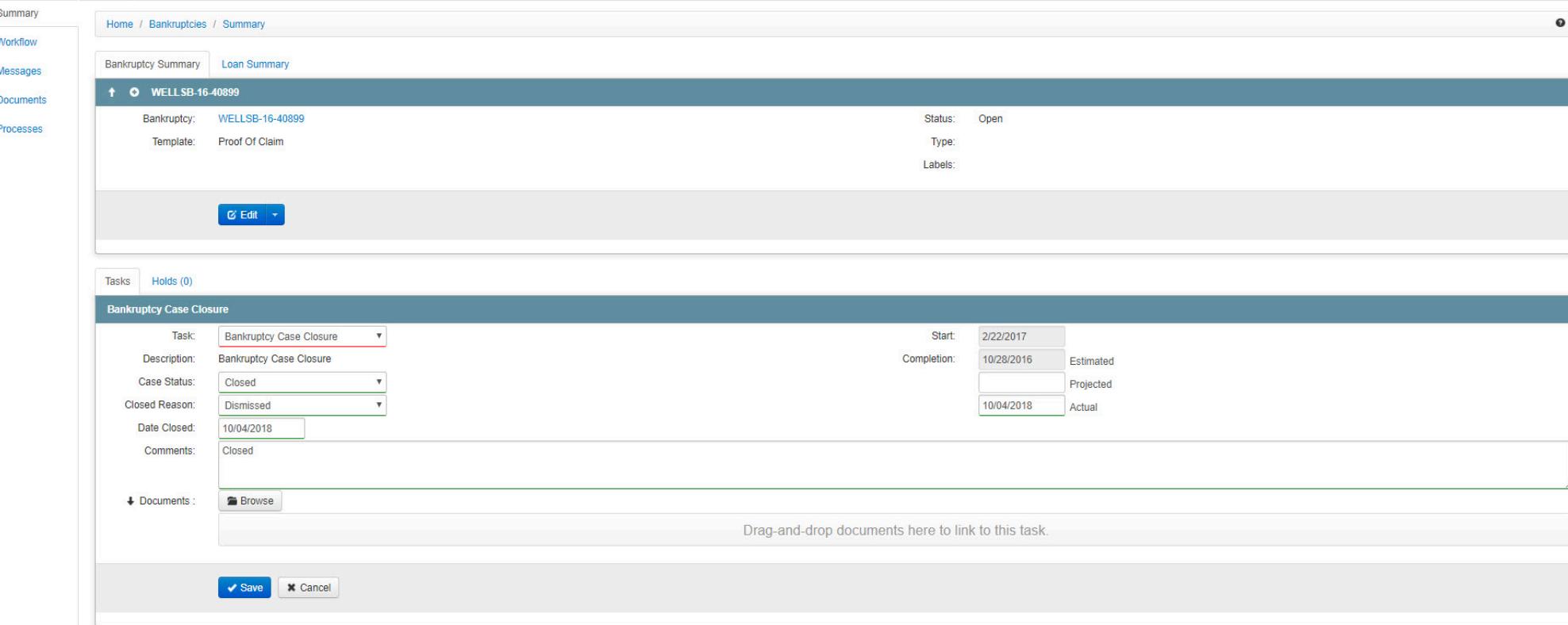


The screenshot shows the Freddie Mac ADR (UAT) Attorney Data Reporting System. The main page displays a bankruptcy summary for case WELL SB-16-40899. The 'Tasks' tab is selected, showing four tasks: File Received, POC Filed, Plan Confirmed, and Bankruptcy Case Closure. The 'Bankruptcy Case Closure' task is highlighted with a red box and a red arrow points to it from the text below.

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	Updated By
File Received	Attorney Step Complete	7/29/2016	7/29/2016	7/28/2016	-1	7/28/2016	cxt@mccallaraymer.com
POC Filed	Attorney Step Complete	8/28/2016	8/28/2016	7/28/2016	-31	7/28/2016	cxt@mccallaraymer.com
Plan Confirmed	Attorney Step Complete	10/27/2016	2/22/2017	2/22/2017	118	2/22/2017	testattorney2@quandis.com
Bankruptcy Case Closure	Attorney Step Started	10/28/2016	2/23/2017			2/22/2017	testattorney2@quandis.com

1. Click on the Tasks tab.
2. Just like you would a foreclosure, bankruptcy Tasks are completed the same way. You will access the current available task by clicking on the blue hyperlink. In the example photo above, this is the 'Bankruptcy Case Closure' task.

Note: The Projected date may not require being entered, but the Actual Completion date, and Comments must be entered. Then you may click the blue Save button and continue.



The screenshot shows the Freddie Mac ADR (UAT) Attorney Data Reporting System. The main header includes the Freddie Mac logo, the system name 'ADR (UAT) Attorney Data Reporting System', and a navigation bar with links for Home, Support, VendorScape, Logout, and Search. A red notification icon with the number '2' is visible in the top right corner. The left sidebar contains links for Summary, Workflow, Messages, Documents, and Processes. The main content area shows a 'Bankruptcy Summary' tab selected, displaying a file for 'WELLSB-16-40899'. The file details include 'Bankruptcy: WELLSB-16-40899', 'Template: Proof Of Claim', 'Status: Open', 'Type:', and 'Labels:'. Below this is an 'Edit' button. The 'Tasks' tab is selected, showing a 'Bankruptcy Case Closure' form. The form fields include: Task: 'Bankruptcy Case Closure', Description: 'Bankruptcy Case Closure', Case Status: 'Closed', Closed Reason: 'Dismissed', Date Closed: '10/04/2018', and Comments: 'Closed'. To the right, there are fields for Start: '2/22/2017', Completion: '10/28/2016' (Estimated), '10/04/2018' (Projected), and '10/04/2018' (Actual). A 'Documents' section with a 'Browse' button is present, and a note says 'Drag-and-drop documents here to link to this task.' At the bottom are 'Save' and 'Cancel' buttons.

3. Continue repeating the process above, and be advised that some tasks will require the uploading of documents. The system will alert you of any documents that are required, which may be uploaded by clicking the “Browse” button in the screenshot above.

10.1 VIEWING ALL TASKS

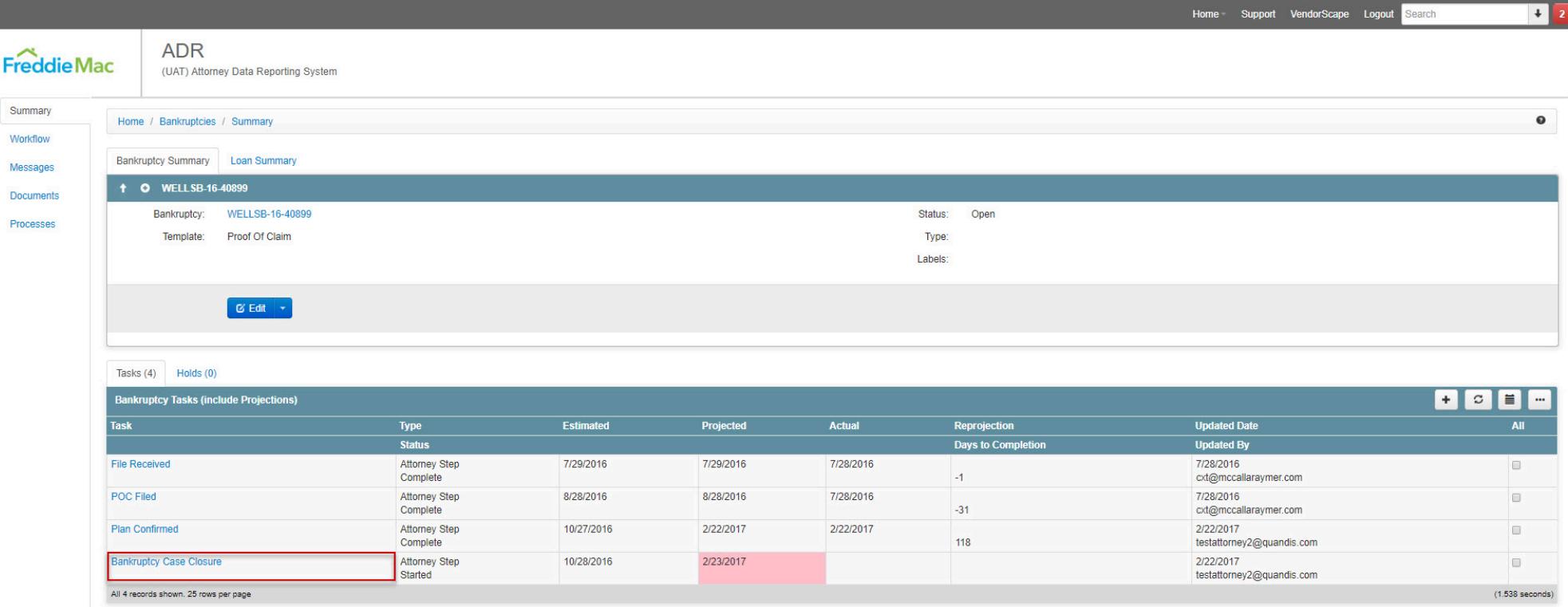
1. By default, all tasks will be visible to you when working on a bankruptcy file.

10.2 REPROJECTING A TASK

Tasks cannot be reprojected to a past date. For example, the current date is October 1, 2018; the Projected Date must be greater than October 1, 2018. If you enter a date that is less than the current date, you will receive the following error message:

Tasks cannot be reprojected to a past date

1. Click on task name hyperlink



The screenshot shows a web-based application interface for managing attorney data. The top navigation bar includes links for Home, Support, VendorScape, Logout, and a search bar. The main header is 'ADR (UAT) Attorney Data Reporting System' with the Freddie Mac logo. On the left, a vertical sidebar lists 'Summary', 'Workflow', 'Messages', 'Documents', and 'Processes'. The main content area shows a 'Bankruptcy Summary' for 'WELLSB-16-40899'. Below this, a table titled 'Bankruptcy Tasks (include Projections)' lists four tasks: 'File Received', 'POC Filed', 'Plan Confirmed', and 'Bankruptcy Case Closure'. The 'Bankruptcy Case Closure' row is highlighted with a red border. The table columns include Task, Type, Status, Estimated, Projected, Actual, Reprojection, Days to Completion, Updated Date, and Updated By. The 'Bankruptcy Case Closure' row has a status of 'Attorney Step Started', an estimated date of 10/28/2016, a projected date of 2/23/2017 (highlighted in red), and an actual date of null. The 'Updated Date' is 2/22/2017 and the 'Updated By' is 'testattorney2@quandis.com'. The bottom of the table shows a note '(1 538 seconds)'.

Task	Type	Status	Estimated	Projected	Actual	Reprojection	Days to Completion	Updated Date	Updated By	All
File Received	Attorney Step Complete	7/29/2016	7/29/2016	7/28/2016		-1		7/28/2016	ctx@mccallaraymer.com	
POC Filed	Attorney Step Complete	8/28/2016	8/28/2016	7/28/2016		-31		7/28/2016	ctx@mccallaraymer.com	
Plan Confirmed	Attorney Step Complete	10/27/2016	2/22/2017	2/22/2017		118		2/22/2017	testattorney2@quandis.com	
Bankruptcy Case Closure	Attorney Step Started	10/28/2016	2/23/2017					2/22/2017	testattorney2@quandis.com	

2. Enter future date in the Projected Date field and commentary as necessary

Summary
Workflow
Messages
Documents
Processes

Home / Bankruptcies / Summary

Bankruptcy Summary Lean Summary

↑ WELLB-16-40899

Bankruptcy: WELLB-16-40899 Status: Open
Template: Proof Of Claim Type:
Labels:

Edit

Tasks Holds (0)

Bankruptcy Case Closure

Task:	Bankruptcy Case Closure	Start:	2/22/2017
Description:	Bankruptcy Case Closure	Completion:	10/28/2016
Comments:	Reprojected date to 10/5/18	Estimated:	10/05/2018
Actual:			

Comments: Reprojected date to 10/5/18

Documents: Drag-and-drop documents here to link to this task.

Save Cancel

3. Click Save.
4. The projected date has been updated



Summary
Workflow
Messages
Documents
Processes

Home / Bankruptcies / Summary

Bankruptcy Summary Loan Summary

↑ • WELLSB-16-40899

Bankruptcy: WELLSB-16-40899

Status: Open

Template: Proof Of Claim

Type:

Labels:

 Edit

Tasks (4) Holds (0)

Bankruptcy Tasks (include Projections)

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All	
							Days to Completion	Updated By
File Received	Attorney Step Complete	7/29/2016	7/29/2016	7/28/2016	-1	7/28/2016	ctx@mccallaraymer.com	<input type="checkbox"/>
POC Filed	Attorney Step Complete	8/28/2016	8/28/2016	7/28/2016	-31	7/28/2016	ctx@mccallaraymer.com	<input type="checkbox"/>
Plan Confirmed	Attorney Step Complete	10/27/2016	2/22/2017	2/22/2017	118	2/22/2017	testattorney2@quandis.com	<input type="checkbox"/>
Bankruptcy Case Closure	Attorney Step Started	10/28/2016	10/5/2018			10/4/2018	testattorney2@quandis.com	<input type="checkbox"/>

All 4 records shown. 25 rows per page

(0.31 seconds)

11 CLOSING A BANKRUPTCY

1. Navigate to the Bankruptcy Summary page and select "edit" (the blue button).
2. When closing a bankruptcy, the Status must be set to "Closed", and a Date Closed and Closed Reason must be supplied. If any of these three elements are missing, the system will not allow the bankruptcy to be saved/closed out.
3. Choose "Status" and select "Closed" from the dropdown, followed by entering a Date Closed and a Closed Reason that applies. Then click "Save" (the blue button).

Summary
Workflow
Processes

Home / Bankruptcies / Summary

Loan: 074592653 has an open Bankruptcy and Foreclosure process. Foreclosure was opened on 07/23/2018.

Bankruptcy Summary Loan Summary

TestBankruptcy

Bankruptcy: TestBankruptcy

Status: Closed

Type: --

State Of Filing: California

Disposition: --

Filing Date: 7/24/2018

Dismissed: --

Court: Central District Of California

Discharged: --

Case #: 123T3ST

Converted: --

Case URL: --

Reopened: --

Chapter: 7

Confirmation Hearing: --

Client: --

Date Opened: --

Client Person: --

Opened Reason: --

Vendor: --

Date Due: --

Vendor Person: --

Priority: --

Assigned Org.: Trott & Trott

Date Closed: --

Assigned Person: --

Closed Reason: --

 Save

 Cancel

12 TITLE HOME

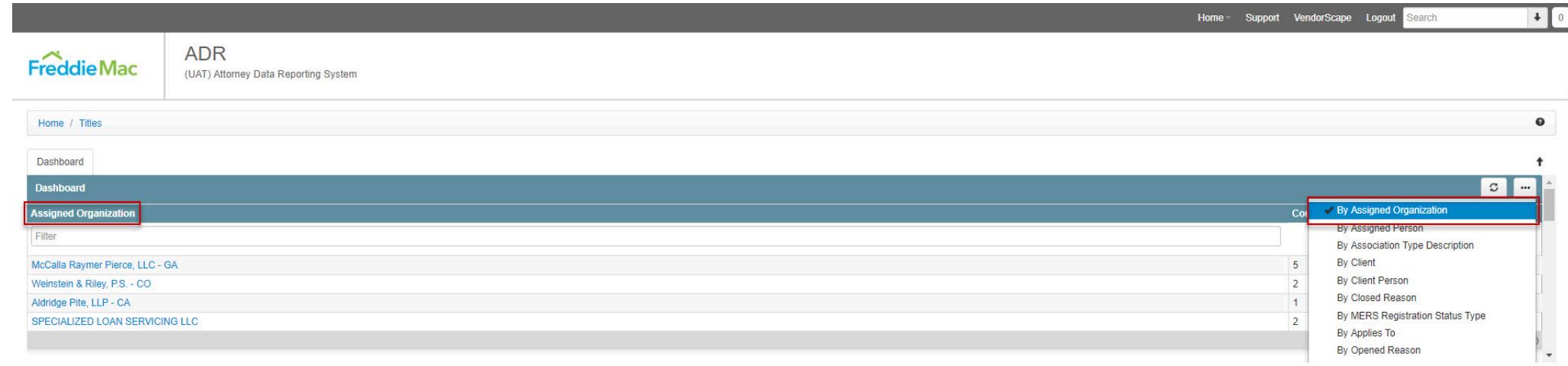
Attorneys can navigate to [Home](#) > [Titles](#) to perform the following functions:

1. [Title Dashboard View](#) [#dashboard]
2. [Title List View](#) [#list]
3. [Title Order Cancellation](#) [#cancel]
4. [Title Summary](#) [#summary]
5. [Title Product Retrieval](#) [#product]
6. [Title Update Requests](#) [#titleupdate]
7. [Title Order Inquiries](#) [#titleinquiries]

12.1 TITLE DASHBOARD

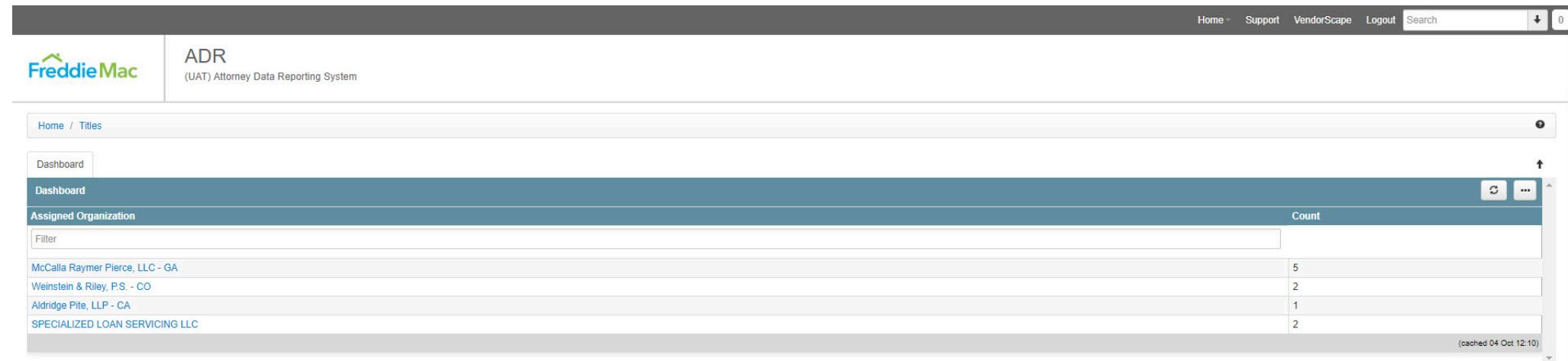
1. Navigate to [Home > Titles](#) to navigate to the Title Home page
2. The first panel displays the Title Dashboard, you can perform the following functions within this panel:
 3. View Count (listed under Count column) of Titles based on applied filter

Note: Select the ellipsis symbol on the right of the dashboard to filter criteria; In this example the Dashboard is filtered by "Assigned Organization"



The screenshot shows the Title Dashboard. On the left, there is a sidebar with 'Dashboard' and 'Assigned Organization' buttons. The 'Assigned Organization' button is highlighted with a red box. Below it is a 'Filter' input field. To the right is a table with four rows of organization names and their counts: McCalla Raymer Pierce, LLC - GA (5), Weinstein & Riley, P.S. - CO (2), Aldridge Pite, LLP - CA (1), and SPECIALIZED LOAN SERVICING LLC (2). To the right of the table is a dropdown menu with various filter options, one of which is 'By Assigned Organization' with a checked checkbox, also highlighted with a red box.

Assigned Organization	Count
McCalla Raymer Pierce, LLC - GA	5
Weinstein & Riley, P.S. - CO	2
Aldridge Pite, LLP - CA	1
SPECIALIZED LOAN SERVICING LLC	2



The second screenshot shows the same Title Dashboard, but the 'Count' column header is now visible in the table header. The data remains the same: McCalla Raymer Pierce, LLC - GA (5), Weinstein & Riley, P.S. - CO (2), Aldridge Pite, LLP - CA (1), and SPECIALIZED LOAN SERVICING LLC (2). A small note at the bottom right of the table says '(cached 04 Oct 12:10)'.

Assigned Organization	Count
McCalla Raymer Pierce, LLC - GA	5
Weinstein & Riley, P.S. - CO	2
Aldridge Pite, LLP - CA	1
SPECIALIZED LOAN SERVICING LLC	2

12.2 TITLE LIST

1. Drill down to see list of Titles by selecting hyperlink, this list will appear within the Title List panel (e.g. Filter criteria set to "By Assigned Organization", selected SPECIALIZED LOAN SERVICING LLC, list of Titles render in Title List panel).

Home / Titles

Dashboard

Dashboard

Assigned Organization

Filter

	Count
McCalla Raymer Pierce, LLC - GA	5
Weinstein & Riley, P.S. - CO	2
Aldridge Pite, LLP - CA	1
SPECIALIZED LOAN SERVICING LLC	2

(cached 04 Oct 12:10)

Titles

All Titles: Assigned Organization = SPECIALIZED LOAN SERVICING LLC

Case #	Address	Title Company	Type	Date Opened	Date Closed	Labels	All
Assigned To	City	State	Postal Code	Received Date	Status	Opened Reason	Closed Reason
000237000DIL SPECIALIZED LOAN SERVICING LLC	278 Peach Tree Cir Atlanta, GA 30301						
DILADM083118 SPECIALIZED LOAN SERVICING LLC	123 Cliff Street Boulder, CO 80301			8/31/2018			

All 2 records shown. 25 rows per page (0.611 seconds)

12.3 TITLE ORDER CANCELLATION

Servicer can cancel a title order as outlined below:

1. Navigate to the **Summary Page** for the **Title** that needs to be cancelled
2. Scroll to the **Tasks** panel and select “+ New Task”

Tasks (0) Holds (0)

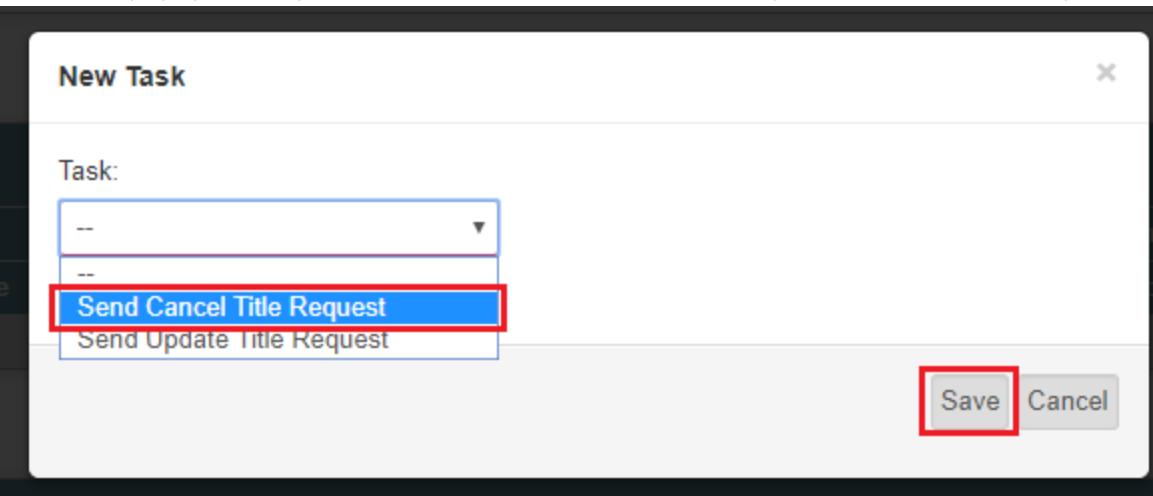
Title Tasks

Task	Type	Estimated	Projected	Actual	Reprojection	Update	All
Status						Days to Completion	Update

+ New Task
+ New Request

All 0 records shown. 25 rows per page (1.414 seconds)

3. Within the popup that is presented, select "Send Cancel Title Request" from the Task dropdown menu and click "Save"



4. You will be presented with a **Task Edit** screen, where you will need to choose a Closed Reason, and click "Save". If it is determined the Cancellation request should not be sent at this time, click "Cancel". The Task can be accessed at a later time to proceed with the Cancellation request.

Tasks Holds (0)

Send Cancel Title Request

Closed Reason:	Client Cancellation Request
	Client Cancellation Request
	Opened In Error
	Complete

Tasks Holds (0)

Send Cancel Title Request

Closed Reason:	Client Cancellation Request
----------------	-----------------------------

✓ Save **✗ Cancel**

Tasks (1) Holds (0)

Title Tasks

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
		Days to Completion				Updated By	
Send Cancel Title Request	Ad-hoc	3/21/2019		3/20/2019		0	

All 1 records shown. 25 rows per page (0.101 seconds)

*Note: Titles cannot be cancelled after Product has been received. If Product has already been received, it will be indicated within the Task Edit screen, and the user will only be able to click "Cancel".

Tasks Holds (0)

Send Cancel Title Request

Title cannot be cancelled after product has been received.

Cancel

5. Once saved, the Cancellation request will be sent to the Title Vendor, where a decision will be made to allow the Cancellation, and whether or not a charge will be assessed. Please contact the Title Vendors directly for billing questions and to obtain their allowable cancellation time frames.

12.3.1 VERIFY CANCELLATION OF TITLE ORDER

Cancellations may take up to a day for the Title Vendors to process. Please contact the Title Vendor directly for an update if a response is not received within 24 hours of the Request being sent. Servicers can verify the cancellation of the Title Order using the following steps:

1. If the cancellation request was approved, the Title's Status will be "Canceled", its Date Closed will be populated, and it will have "CANCEL/NO BILL" as its Closed Reason. These elements can be viewed in the list on the **Title Home** page and in the **Titles** tab of the **Loan Summary** page:

Titles							
Case #	Address			Title Company	Type	Date Opened	Date Closed
Assigned To	City	State	Postal Code	Received Date	Status	Opened Reason	Closed Reason
050208985 McCalla Raymer Pierce, LLC - GA	144 Fontenot Dr Savannah, GA 31405			First American Title	Foreclosure Canceled	2/15/2019	2/25/2019 CANCEL/NO BILL

All 1 records shown. 25 rows per page (0.702 seconds)

As well as on the **Title Summary** page:

Title Summary Loan Summary

↑ 050208985

Title: 050208985	Status: Canceled
Template: Foreclosure Title	Type: Foreclosure
Vendor:	Date Due: 2/27/2019
Vendor Person:	Priority:
Assigned Org.:	Date Closed: 2/25/2019
Assigned Person:	Closed Reason: CANCEL/NO BILL

2. If the cancellation was denied, a Message indicating such will appear in the **Messages** panel of the **Title Summary** page. Message Bodies will vary between the Vendors, and some Vendors may provide additional information within the Body.

Messages			
Messages			
Message	Date Added	Type	Labels
Template	From Address	Status	All
Title Cancellation	3/19/2019 9:24 AM qtdapi@quandis.com		
Your Cancellation request has been received. Title365 has cancelled your order. However, this is a billable order and an invoice will be submitted for the product following the usual process.			
Confirmation	3/18/2019 9:22 AM		

12.4 TITLE SUMMARY PAGE

Attorney can perform the following functions through the Title Summary page:

1. View Title, Property, and Loan Summary panels

2. View Activity Panel and perform the following functions for Public Records and Transactions

: Add a new Public Record/Transaction

: Refresh Public Records/Transactions panel

: View Public Records/Transactions by various filters

: Export details of Public Records/Transactions to CSV or Excel

Public Records (0)	Transactions (0)				
Public Records					
Public Record	Type	Filing Date	Origination Date	Balance Amount	Defendant
Status	Recording Date	Original Amount	Default Amount	Attorney	Labels
All 0 records shown. 25 rows per page					(0.141 seconds)

3. View Workflow Panel and perform the following functions for Tasks and Holds

: Add a new Task/Hold

: Refresh Task/Hold panel

: View Task/Hold by various filters

: Export details of Task/Hold to CSV or Excel

Tasks (0)	Holds (0)			
Title Tasks				
Task	Type	Estimated	Projected	Actual
Status			Reprojection	Updated Date
Days to Completion				
Updated By				
All 0 records shown. 25 rows per page				
(1.038 seconds)				

4. View Messages Panel and perform the following functions

: Add New Message

: Refresh Message panel

: View Messages by various filters

: Export details of Messages to CSV or Excel

Messages (3)					
Messages					
Quick Message					
Message	Date Added	From Address	Type	Labels	All
Template			Status		
TEST Message 090318 Order Inquiry	9/3/2018 6:13 PM	aangle@quandis.com			<input type="checkbox"/>
Confirmation	9/2/2018 4:03 PM	FirstAmericanTitle@quandis.com			<input type="checkbox"/>
Title Data Title Data	9/2/2018 4:02 PM	adrapi@quandis.com			<input type="checkbox"/>

5. View Documents Panel and perform the following functions

Note: Once an order is fulfilled, the Title product is accessible through this panel

: Add New Document, New folder, or Bulk Upload

: Refresh Documents panel

: View Documents by various filters; Zip and Email; Convert to PDF; Merge to Single PDF

: Export details of Documents to CSV or Excel

Documents (2)					
Documents					
Document	Type	Checked Out	Created	Updated	
Template	Status	Checked In			
Mod_Affidavit_Loan#.pdf	<input type="checkbox"/>		8/31/2018 3:08 PM by cmartin	8/31/2018 3:08 PM by cmartin	<input type="checkbox"/>
TESTPDF.pdf Deed In Lieu Signing	<input type="checkbox"/>		8/31/2018 3:08 PM by cmartin	8/31/2018 5:23 PM by EAksoy	<input type="checkbox"/>



6. View Processes Panel and perform the following functions

: Attorney does not have permission to add Related Processes

: Refresh Related Processes panel

: View Related Processes by various filters

: Export details of Related Processes to CSV or Excel

Related Processes (3)							
Processes							
Process	Type	Client		Assigned To	Opened	Labels	All
Template	Status	Vendor		Due	Closed		
000242594 Foreclosure Title	Foreclosure Open	Tiffany & Bosco, P.A. - CA			9/3/2018		<input type="checkbox"/>
FC090318SL Foreclosure	Open	Tiffany & Bosco, P.A. - CA			9/3/2018		<input type="checkbox"/>
000242594 Deed In Lieu							<input type="checkbox"/>

12.5 TITLE PRODUCT RETRIEVAL

Title product is retrieved through the **Documents** panel of the specific **Title Summary** page.

1. Select hyperlink to download document

Documents (2)							
Documents							
Document	Type	Checked Out	Created	Labels	All		
Template	Status	Checked In	Updated				
Invoice Document - 82215932 Title Invoice			9/4/2018 10:28 AM by qtdapi 9/4/2018 10:28 AM by qtdapi			<input type="checkbox"/>	
GRADE SHEET WITH TITLE REPORT Title Product	GSTR		9/4/2018 9:24 AM by qtdapi 9/4/2018 9:24 AM by qtdapi			<input type="checkbox"/>	

12.5.1 BENEFICIARY CHECK DOCUMENT RETRIEVAL

Title Vendors are expected to produce Beneficiary Checks (Bene-Checks) for all Foreclosure Title Orders in Trustee Sale Guarantee (TSG) states. The Bene-Check Product should be delivered within 24 hours of the Title being ordered, and you will be notified via email once it is available in the system. If your firm has a primary email address setup on your Organization Summary screen, the notification will only be sent to that email address:

Contact Methods (1)							
Contact Methods							
Contact Method	Primary Method		Start Date	Verified Source	Labels	All	
Description	Status		End Date	Verified Date			
primarycontact@firm.com Email	True					<input type="checkbox"/>	

Otherwise, it will be sent to all active Security Administrators associated with your firm. The Bene-Check document can be found in the same location as the Product documents, and will be appropriately labeled (labeling may vary between Title Vendors).

Documents (5)						
Documents						
Document	Type	Checked Out		Created	Labels	All
Template	Status	Checked In		Updated		
Property Information Report Title Product				2/26/2019 2:23 PM by qtdapi 2/26/2019 2:23 PM by qtdapi		<input type="checkbox"/>
Property Information Report Title Product				2/26/2019 10:33 AM by qtdapi 2/26/2019 10:33 AM by qtdapi		<input type="checkbox"/>
Property Information Report Title Product				2/26/2019 10:33 AM by qtdapi 2/26/2019 10:33 AM by qtdapi		<input type="checkbox"/>
Bene Check Search Package Title Supplemental				2/22/2019 10:47 AM by qtdapi 2/22/2019 10:47 AM by qtdapi		<input type="checkbox"/>
Property Information Report Title Product				11/1/2018 11:06 AM by qtdapi 11/1/2018 11:06 AM by qtdapi		<input type="checkbox"/>
All 5 records shown. 25 rows per page					(0.415 seconds)	

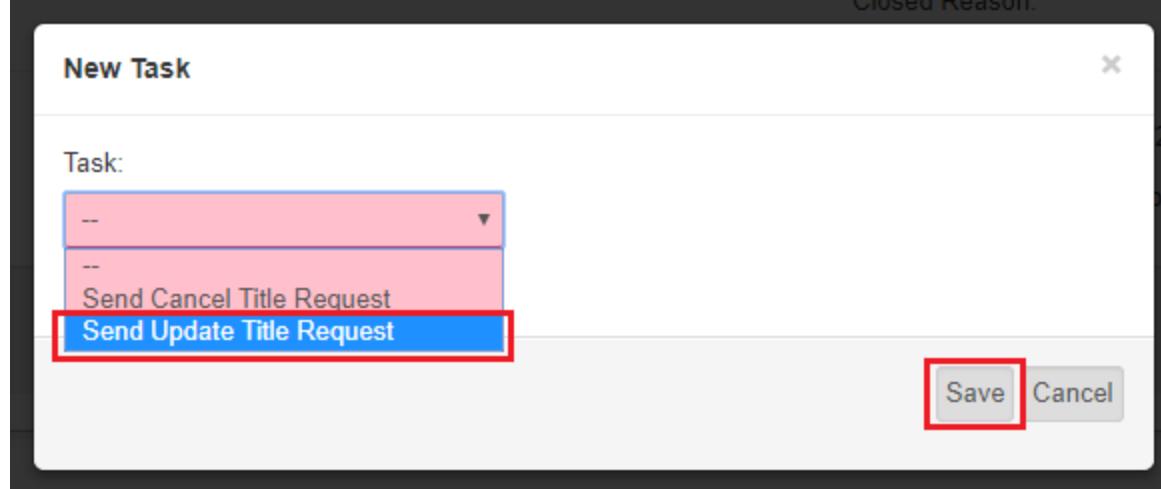
12.6 TITLE UPDATE REQUESTS

Once Title Product has been received, Updates can be ordered. The steps for doing this are as follows:

1. Navigate to the **Summary Page** for the **Title** requiring an update
2. Scroll to the **Tasks** panel and select “+ New Task”

Tasks (0)		Holds (0)	Title Tasks								
Task	Type	Estimated	Projected	Actual	Reprojection		Update	+ New Task	+ New Request	All	
Status					Days to Completion		Update	+ New Task	+ New Request	All	
All 0 records shown. 25 rows per page											

3. Within the popup that is presented, select “Send Update Title Request” from the Task dropdown menu and click “Save”



4. Select an Update Type from the dropdown menu, then enter the Instructions for this Update, including the Good Through Date, if applicable, then click "Save".

***Note: the Update Type list will vary between Trustee Sale Guarantee (TSG) and non-TSG states**

Tasks Holds (0)

Send Update Title Request

Update Type:	GENERAL UPDATE
Update Instructions (e.g. Good through date information):	Good through 4/1/2019

✓ Save **✗ Cancel**

Tasks (1) Holds (0)

Title Tasks

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
				Days to Completion		Updated By	
Send Update Title Request	Ad-hoc	3/21/2019		3/20/2019		0	
All 1 records shown. 25 rows per page (0.09 seconds)							

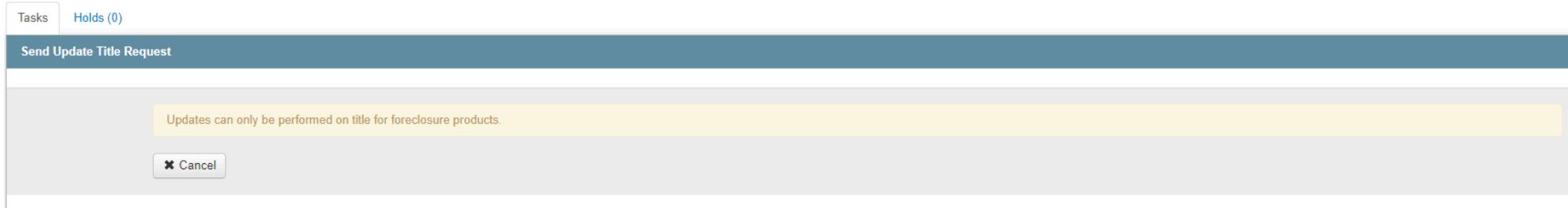
5. You may only request Updates after the Product has been received, and only on Foreclosure products. If you attempt to send an Update under an invalid condition, an error message will be displayed in the Task Edit panel, indicating why the Update cannot be ordered, and the user will be forced to click the "Cancel" button. For Foreclosure products, the Task can be accessed and saved if the Product is received at a later date.

Tasks Holds (0)

Send Update Title Request

Updates can only be performed on title for foreclosure products.

 Cancel

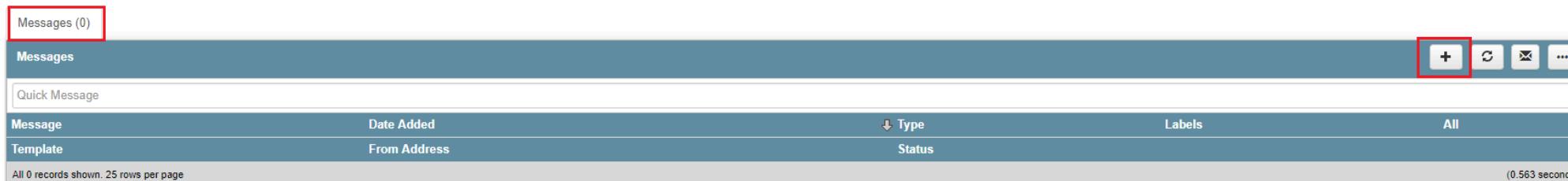


*Note: The length of time for delivery, and the Product produced for Title Updates will vary between each Vendor. Please contact the Title Vendors using the Messages Panel (see section 12.7) for delivery delay inquiries and Product questions.

12.7 TITLE ORDER INQUIRIES

If any questions on the Title Order should arise, the Title Vendor assigned to the Order can be contacted by adding an Order Inquiry Message within the Messages Panel.

1. Locate the Messages Panel on the Title Order and click the "+" button to add a new message.



Message	Date Added	Type	Labels	All
Template	From Address	Status		
				(0.563 seconds)

2. Select "Order Inquiry" from the Template dropdown, then enter/edit the Subject in the Message field. Enter the information you want sent to the Title Vendor in the Body field. You can opt to send the message as an email by entering recipient email addresses in the To field. Once all information is entered, click "Save".

Messages

New Message

Message:	Title Order Inquiry - Status Request	Status:	--
Template:	Order Inquiry	Type:	--
	Select		
Date Added:	Order Inquiry	Priority:	Normal
From:	testattorney1@quandis.com	Secure Delivery:	<input type="radio"/> Yes <input checked="" type="radio"/> No
To:	user@firm.com [x]		
Body:	Please provide the status of the Title Order request sent on 6/20/19. Thank you.		
			
Attachments:	Drag-and-drop documents here to add as attachments to this message.		
<input checked="" type="button"/> Save <input type="button"/> Cancel 			

3. The Message will be displayed in the Messages panel, and will be transmitted to the Title Vendor.

Messages (1)

Messages

Message	Date Added	Type	Labels	All
Template	From Address			
Order Inquiry	6/25/2019 10:59 AM			<input type="checkbox"/>
Order Inquiry	testattorney1@quandis.com			

All 1 records shown. 25 rows per page (0.082 seconds)

4. Responses sent by the Vendor will appear in the Messages Panel. The full Message can be reviewed by clicking "Toggle Detail" from the envelope icon options menu.

Messages (2)

Messages

Quick Message

Message Date Added Type Status

Template From Address

Title Delayed 6/25/2019 11:06 AM qtadapi@quandis.com

Title Data

Order Inquiry 6/25/2019 10:59 AM testattorney1@quandis.com

Order Inquiry

Please provide the status of the Title Order request sent on 6/20/19. Thank you.
user@firm.com

All 2 records shown. 25 rows per page

Toggle Detail

- Mark Read
- Mark Unread
- Show Active
- Show Active Status
- Show Can Delete
- Show Can Insert
- Show Can Update
- Show Final Status
- Show Information Only
- Show Sent
- Show Template Extranet
- Show Unread
- Show Unread Notifications

seconds)

13 DOCUMENTS

This section outlines how to upload documents

1. Click on the documents tab
2. Click the desired upload option
 - '+ New Document'
 - '+ New Folder'
 - 'Bulk Upload'

Documents (0)

Documents

Document Type Checked Out Created Labels

Template Status Checked In Updated

All 0 records shown. 25 rows per page

+ New Document

+ New Folder

④ Bulk Upload

Drag-and-drop files here to upload.

(0.192 seconds)

3. Select the Arrow Icon or Drag-and-Drop, to upload a file. Select a Template to match the document type (which needs to reflect the requested/required document, in order to appease the system), and enter a Description. Fill out any other text fields that may apply, though they are not necessarily required.
4. Click Save.
5. The document has been uploaded.
6. The document panel provides the following information:
 - Document name

- User Upload
- Created Date
- Updated Date

Documents (1)				
Documents				
Document	Type	Checked Out	Created	Labels
Template	Status	Checked In	Updated	All
CTReq.jpg			10/4/2018 6:20 PM by testattorney2 10/4/2018 6:20 PM by testattorney2	<input type="checkbox"/>

All 1 records shown. 25 rows per page (0.078 seconds)

****Document types that can be uploaded include: PDF, Word, XLS, .PNG, JPG, .JPEG

13.1 VIEWING A DOCUMENT

1. Click on the document name hyperlink.

Note: The document will open based on your settings for the document being viewed.

Documents (1)				
Documents				
Document	Type	Checked Out	Created	Labels
Template	Status	Checked In	Updated	All
CTReq.jpg			10/4/2018 6:20 PM by testattorney2 10/4/2018 6:20 PM by testattorney2	<input type="checkbox"/>

All 1 records shown. 25 rows per page (0.078 seconds)

13.2 DELETING A DOCUMENT

1. Click in the row of the document to be deleted.

Note: Documents table within Foreclosure Summary page

Documents (2)		Documents				
Document	Type	Checked Out	Created	Labels	All	
Template	Status	Checked In	Updated			
 DragDrop.jpg			7/24/2018 11:29 AM by trottuser8 7/24/2018 11:29 AM by trottuser8			<input checked="" type="checkbox"/>
 DragDrop.jpg			7/24/2018 11:00 AM by trottuser8 7/24/2018 11:00 AM by trottuser8			<input type="checkbox"/>

2. Select Delete from the Options drop-down menu

Documents (2)					   
Documents					
Document	Type	Checked Out	Created	Labels	
Template	Status	Checked In	Updated		
 DragDrop.jpg			7/24/2018 11:29 AM by trottuser8 7/24/2018 11:29 AM by trottuser8		
 DragDrop.jpg			7/24/2018 11:00 AM by trottuser8 7/24/2018 11:00 AM by trottuser8		

3. Confirmation dialogue box is presented. Click Okay to confirm the document is to be deleted.

The screenshot shows a Quandis software interface with a dark-themed sidebar on the left containing 'Accounting', 'Messages', 'Documents', and 'Processes' sections. The 'Messages' section is currently active, showing a list of messages with columns for 'Type', 'Labels', and 'All'. A modal dialog box is centered over the list, titled 'Delete selected records?' with the sub-instruction 'Are you sure?'. At the bottom of the dialog are 'Okay' and 'Cancel' buttons. The background list shows three messages, all of which are of type 'Sale Scheduled' and have the label 'Status'. The messages are: 'Sale Scheduled - Projected Completion Changed. Actual Completion Changed.', 'Sale Scheduled - Projected Completion Changed.', and 'Sale Scheduled - Projected Completion Changed. Actual Completion Changed.'.

4. The document is deleted.

Documents (1)						
Documents						
Document	Type	Checked Out	Created	Labels	All	
Template	Status	Checked In	Updated			
 DragDrop.jpg	<input checked="" type="checkbox"/>		7/24/2018 11:00 AM by trottuser8 7/24/2018 11:00 AM by trottuser8			<input type="checkbox"/>

1. Click on the messages tab.



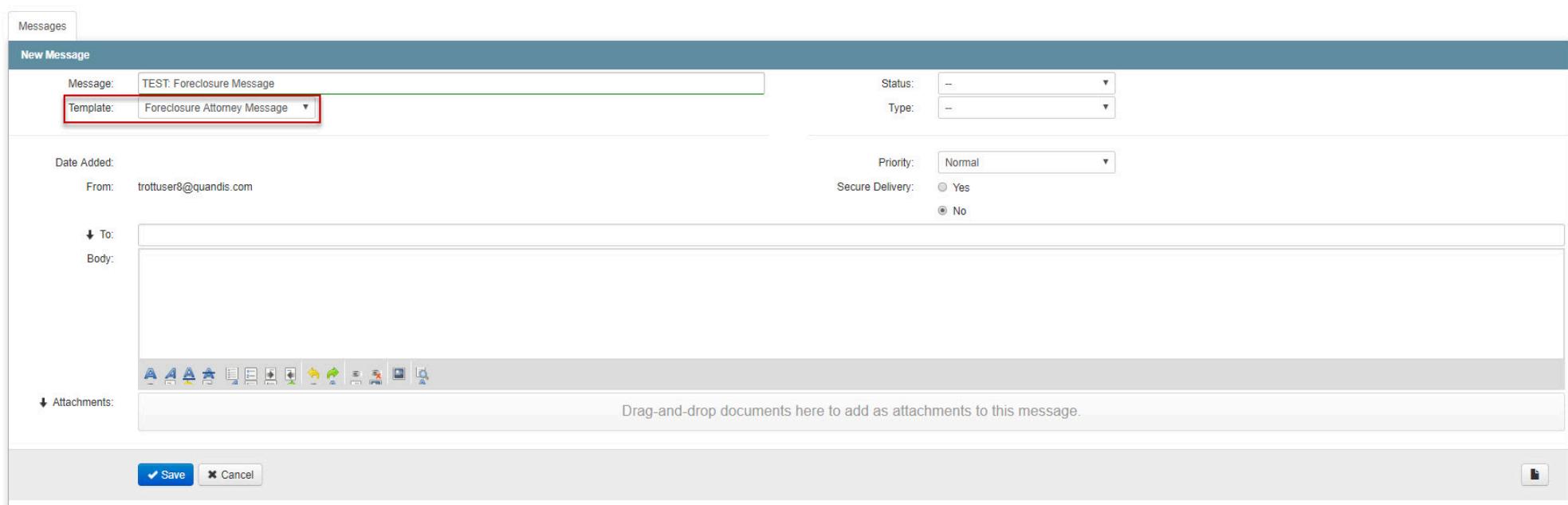
Message	Date Added	Type	Labels	All
Sale Scheduled - Projected Completion Changed. Actual Completion Changed.	7/23/2018 3:41 PM trottuser8@quandis.com	Sale Scheduled		<input type="checkbox"/>
Sale Scheduled - Projected Completion Changed.	7/23/2018 3:40 PM trottuser8@quandis.com	Sale Scheduled		<input type="checkbox"/>
Sale Scheduled - Projected Completion Changed. Actual Completion Changed.	7/23/2018 3:40 PM trottuser8@quandis.com	Sale Scheduled		<input type="checkbox"/>

2. Select Add a new message by clicking the "+" sign on the right.



Message	Date Added	Type	Labels	All
Sale Scheduled - Projected Completion Changed. Actual Completion Changed.	7/23/2018 3:41 PM trottuser8@quandis.com	Sale Scheduled		<input type="checkbox"/>
Sale Scheduled - Projected Completion Changed.	7/23/2018 3:40 PM trottuser8@quandis.com	Sale Scheduled		<input type="checkbox"/>
Sale Scheduled - Projected Completion Changed. Actual Completion Changed.	7/23/2018 3:40 PM trottuser8@quandis.com	Sale Scheduled		<input type="checkbox"/>

3. The Message edit template opens. If a template is to be used, select the template from the drop-down box. Template message will complete the subject line and body section. Otherwise, confirm Select is in the template field.



Message:	Status:
TEST: Foreclosure Message	Normal
Template:	Type:
Foreclosure Attorney Message	Normal
Date Added:	Priority:
From: trottuser8@quandis.com	Normal
To:	Secure Delivery:
Body:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Attachments:	Drag-and-drop documents here to add as attachments to this message.

4. If the message is to be emailed to other parties, enter the email address in the to field. Separate multiple recipients with a comma (,)

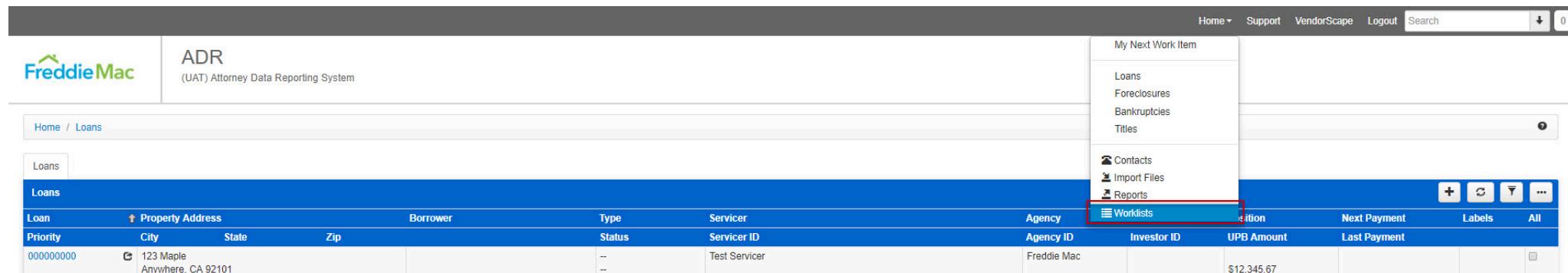
5. Send the message via email by clicking on Save.
6. The message is populated in the Messages panel.

15 WORKLIST

15.1 MANAGING THE SMART WORKLIST

The Smart Worklist assigns Tasks to users that need to be completed or re-projected. See Section 6 for information on Foreclosure Task management, and section 10 for information on Bankruptcy Task management. Tasks appear in the user's Queue.

Access Worklists by choosing Home > Worklists



The screenshot shows the ADR (UAT) Attorney Data Reporting System interface. At the top, there is a navigation bar with links for Home, Support, VendorScape, Logout, and a search bar. A dropdown menu titled 'My Next Work Item' is open, showing options like Loans, Foreclosures, Bankruptcies, Titles, Contacts, Import Files, Reports, and Worklists. The 'Worklists' option is highlighted with a red box. Below the navigation bar, there is a breadcrumb trail 'Home / Loans' and a table titled 'Loans' with columns for Loan, Property Address, Borrower, Type, Servicer, and Agency. A single row of data is visible in the table.

Note: Only users with the role of Manager can complete the below functions

15.1.1 VIEWING THE SMART WORKLIST TABLE

1. Select [Home > Worklists](#).
2. To view the list of tasks available in the Smart Worklist, select "By Worklist" under the Options drop-down of the "Summary by Worklist" panel.

Home / Worklists

Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total
Bankruptcy Case Closure	1	0	0	1	0	3	4
Bankruptcy File Received	9	2	7	0	1919	544	2474
Complaint Filed	29	0	27	2	248	48	325
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3
Curative	9	5	0	4	2	0	16
Deed Recorded	4	2	2	0	34	135	173
Deed Recorded	0	0	0	0	39	29	68
Default Filed	74	0	74	0	6	20	100
Default Judgment Enters	0	0	0	0	1	0	1

Worklist Members

Item	Status	Team	Started	Completed	Cancelled	All
Worklist	User	Priority	Skipped	Due		

All 0 records shown. 25 rows per page

Refine Search

- By Person
- By Team
- By Worklist** (highlighted)

Audit

- Show Active
- Show Active Status
- Show Cancelled
- Show Can Delete
- Show Can Insert
- Show Can Invite

3. You can sort "By Team" or "By Person" to view tasks assigned to different teams and users.

Home / Worklists

Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total
Bankruptcy Case Closure	1	0	0	1	0	3	4
Bankruptcy File Received	9	2	7	0	1919	544	2472
Complaint Filed	29	0	27	2	248	48	325
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3
Curative	9	5	0	4	2	0	11
Deed Recorded	4	2	2	0	34	135	173
Deed Recorded	0	0	0	0	39	29	68
Default Filed	74	0	74	0	6	20	100
Default Judgment Enters	0	0	0	0	1	0	1

Refine Search

- By Person
- By Team
- By Worklist
- Audit
- Show Active
- Show Active Status
- Show Cancelled
- Show Can Delete
- Show Can Insert
- Show Can Update

4. Selecting the name of the task or a number under a column (Items, Queued, Started, etc.) will open a 'Worklist Members' Panel.

Home / Worklists

Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Bankruptcy Case Closure	1	0	0	1	0	3	4	0	0
Bankruptcy File Received	9	2	7	0	1919	544	2472	0	0
Complaint Filed	29	0	27	2	248	48	325	0	0
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3	0	0
Curative	9	5	0	4	2	0	11	0	0
Deed Recorded	4	2	2	0	34	135	173	0	0
Deed Recorded	0	0	0	0	39	29	68	0	0
Default Filed	74	0	74	0	6	20	100	0	0
Default Judgment Enters	0	0	0	0	1	0	1	0	0

Worklist Members

Pending Worklist Members: Worklist = Bankruptcy Case Closure

Item	Status	Team	Started	Completed	Cancelled	All
Worklist	User	Priority	Skipped	Due		
WELLSB-16-40899			10/5/2018 12:00 AM	10/5/2018		(0.252 seconds)

All 1 records shown. 25 rows per page

15.1.2 RE-QUEUE SMART WORKLIST ITEMS

1. Re-queuing an item is to remove the "Completed" or "Cancelled" date from a task so that it may be moved into the worklist.
2. Select a task from the "Worklist" column in the "Summary by Worklist" panel.
3. In the "Items" panel, select the tasks that need to be re-queued by selecting the corresponding checkbox

The screenshot shows a table titled 'Pending Worklist Members: Worklist = Bankruptcy Case Closure'. The table has columns: Item, Status, Team, Started, Completed, Cancelled, and All. A single row is selected, representing a task with the ID 'WELLSB-16-40899' and the description 'Bankruptcy Case Closure'. The 'Completed' column for this row contains a date '10/5/2018'. A red box highlights the checkbox in the 'Cancelled' column for this row. The status bar at the bottom right indicates '(0.252 seconds)'.

4. After the tasks have been selected, click "Requeue Items" from the Options drop-down.

The screenshot shows the same 'Pending Worklist Members' table. A context menu is open over the selected task, with the 'Requeue Items' option highlighted with a red box. Other options in the menu include 'Refine Search', 'Assign Items', 'Auto-Assign Items', 'Cancel Items', 'Complete Items', and 'Set Priority'.

5. Select "Requeue" from the Confirmation window to complete the selected items.

The screenshot shows the 'Pending Worklist Members' table with a confirmation dialog box in the foreground. The dialog box is titled 'Requeue selected items?' and contains three radio button groups: 'Keep Priority' (Yes selected), 'Keep Team' (Yes selected), and 'Keep Person' (No selected). At the bottom of the dialog are 'Requeue' and 'Cancel' buttons.

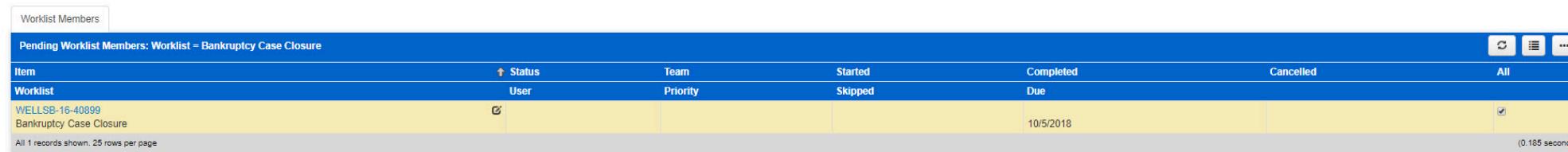
6. Note the selected items no longer have a date in the "Completed" column.

The screenshot shows the 'Pending Worklist Members' table. The previously selected task ('WELLSB-16-40899') now has an empty 'Completed' column cell, indicating that the re-queuing process has removed the completion date. The status bar at the bottom right indicates '(0.185 seconds)'.

7. These tasks can now be assigned, completed, or cancelled.

15.1.3 ASSIGN SMART WORKLIST ITEMS

1. After selecting a task, review the "Items" panel at the bottom of the page

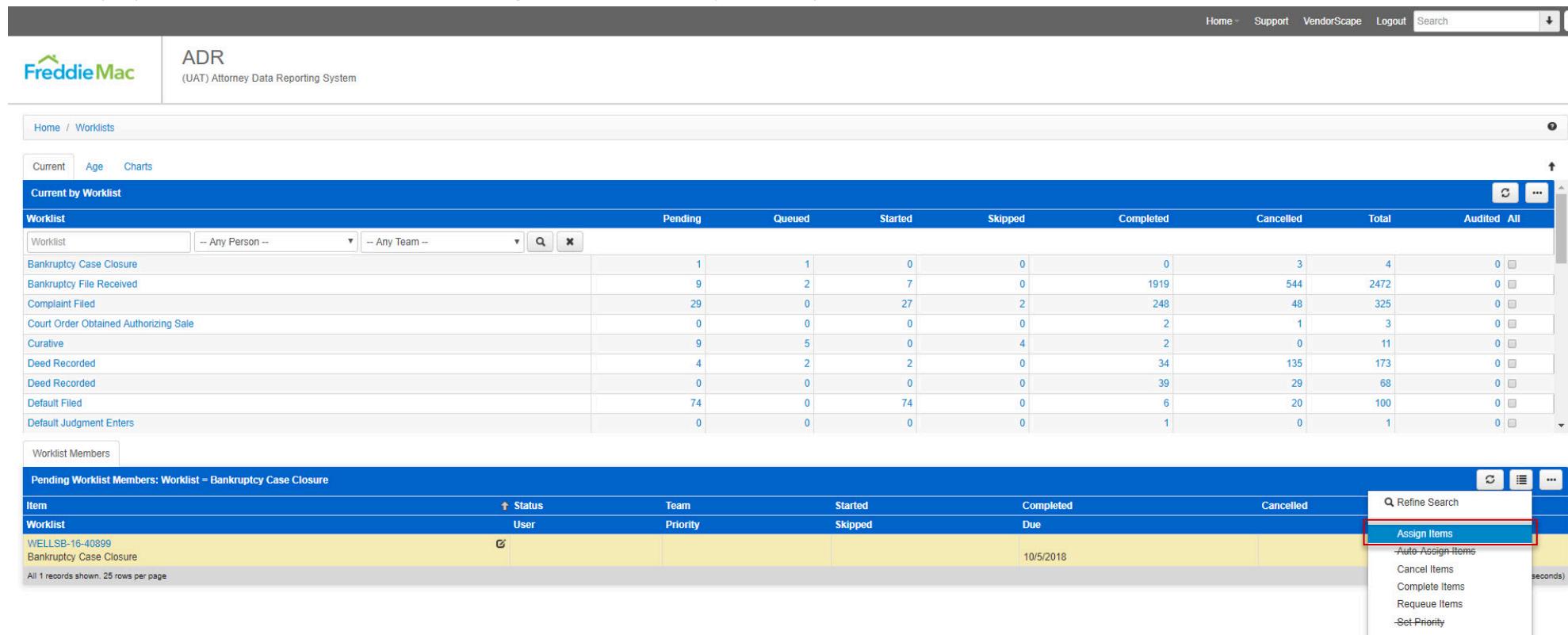


Item	Status	Team	Started	Completed	Cancelled	All
Worklist	User	Priority	Skipped	Due		All
WELLSB-16-40899 Bankruptcy Case Closure	<input checked="" type="checkbox"/>			10/5/2018	<input checked="" type="checkbox"/>	
All 1 records shown. 25 rows per page (0.185 seconds)						

- 2.

Select each task you wish to assign by selecting the checkbox to the corresponding task. Selecting "All" will select all tasks

3. Once the proper tasks have been selected, click "Assign Items" from the Options drop-down.



ADR (UAT) Attorney Data Reporting System

Home / Worklists

Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Bankruptcy Case Closure	1	1	0	0	0	3	4	0	<input type="checkbox"/>
Bankruptcy File Received	9	2	7	0	1919	544	2472	0	<input type="checkbox"/>
Complaint Filed	29	0	27	2	248	48	325	0	<input type="checkbox"/>
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3	0	<input type="checkbox"/>
Curative	9	5	0	4	2	0	11	0	<input type="checkbox"/>
Deed Recorded	4	2	2	0	34	135	173	0	<input type="checkbox"/>
Deed Recorded	0	0	0	0	39	29	68	0	<input type="checkbox"/>
Default Filed	74	0	74	0	6	20	100	0	<input type="checkbox"/>
Default Judgment Enters	0	0	0	0	1	0	1	0	<input type="checkbox"/>

Worklist Members

Pending Worklist Members: Worklist = Bankruptcy Case Closure

Item	Status	Team	Started	Completed	Cancelled
Worklist	User	Priority	Skipped	Due	
WELLSB-16-40899 Bankruptcy Case Closure	<input checked="" type="checkbox"/>			10/5/2018	
All 1 records shown. 25 rows per page (0.185 seconds)					

Refine Search

Assign Items

Auto Assign Items

Cancel Items

Complete Items

Requeue Items

Set Priority

4. In the "Smart Worklist Items" panel, you may select the proper Label/User and select 'Okay'

The screenshot shows the Smart Worklist interface. On the left, there's a sidebar with 'Current', 'Age', and 'Charts' buttons. Below that is a 'Worklist' section with a dropdown for 'Worklist' (set to 'Bankruptcy Case Closure'), 'Any Person', and 'Any Team'. A search bar and a refresh button are also present. The main area displays a grid of worklist items with columns for 'Worklist', 'Status', 'Team', 'Started', 'Completed', 'Cancelled', 'Total', and 'Audited'. A modal window titled 'Worklist Items' is open in the center, containing fields for 'Label' (set to '--') and 'User' (set to '--'). At the bottom of the modal are 'Okay' and 'Cancel' buttons.

5. The panel refreshes and the proper "Team" has been assigned.

The screenshot shows the 'Pending Worklist Members' view for the 'Bankruptcy Case Closure' worklist. The table has columns: Item, Status, Team, Started, Completed, Cancelled, and All. One row is visible for 'WELLSB-16-40899' with 'Bankruptcy Case Closure' in the Item column. The 'Team' column shows 'Advertising Completed' with a red border, indicating it's the selected team. The 'Started' column shows '10/5/2018 12:00 AM', 'Completed' shows a green bar for 'Due', and 'Cancelled' has an empty checkbox. The bottom of the screen shows a message: 'All 1 records shown. 25 rows per page (0.067 seconds)'.

15.1.4 COMPLETE AN ITEM IN THE SMART WORKLIST

Note: Performing this function forces the worklist item into completion, it does not complete the underlying step tied to the task. This should only be done if any items are found in the worklist in error. For example, the Foreclosure case that the worklist item is tied to has been closed, but the item is still active in the list. Please use this worklist feature with caution.

Completing an item on the Smart Worklist will remove it from the "Show Pending" view of the worklist. If the task remains incomplete in the active file, it will remain incomplete until a user accesses the file to complete the task.

1. Select a task from the "Worklist" column in the "Summary by Worklist" panel.
2. In the "Items" panel, select the tasks that need to be completed by selecting the corresponding checkbox.
3. After the tasks have been selected, click "Complete Items" from the Options drop-down.

Home / Worklists

Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Bankruptcy Case Closure	1	1	0	0	0	3	4	0	0
Bankruptcy File Received	9	2	7	0	1919	544	2472	0	0
Complaint Filed	29	0	27	2	248	48	325	0	0
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3	0	0
Curative	9	5	0	4	2	0	11	0	0
Deed Recorded	4	2	2	0	34	135	173	0	0
Deed Recorded	0	0	0	0	39	29	68	0	0
Default Filed	74	0	74	0	6	20	100	0	0
Default Judgment Enters	0	0	0	0	1	0	1	0	0

Worklist Members

Pending Worklist Members: Worklist = Bankruptcy Case Closure

Item	Status	Team	Started	Completed	Cancelled
Worklist	User	Priority	Skipped	Due	
WELLSB-16-40899 Bankruptcy Case Closure	0			10/5/2018	

All 1 records shown. 25 rows per page

Q Refine Search
Assign Items
Auto Assign Items
Cancel Items
Complete Items
Request Items
Set Priority

4. Select "Okay" from the Confirmation window to complete the selected items.
5. Note the selected items now have a completed date under the "Completed" column.

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Bankruptcy Case Closure	0	0	3	4	0	0	4	0	0
Bankruptcy File Received	0	1919	544	2472	0	0	0	0	0
Complaint Filed	2	248	48	325	0	0	0	0	0
Court Order Obtained Authorizing Sale	0	2	1	3	0	0	0	0	0
Curative	4	34	135	173	0	0	0	0	0
Deed Recorded	0	39	29	68	0	0	0	0	0

Confirmation

Are you sure?

Okay Cancel

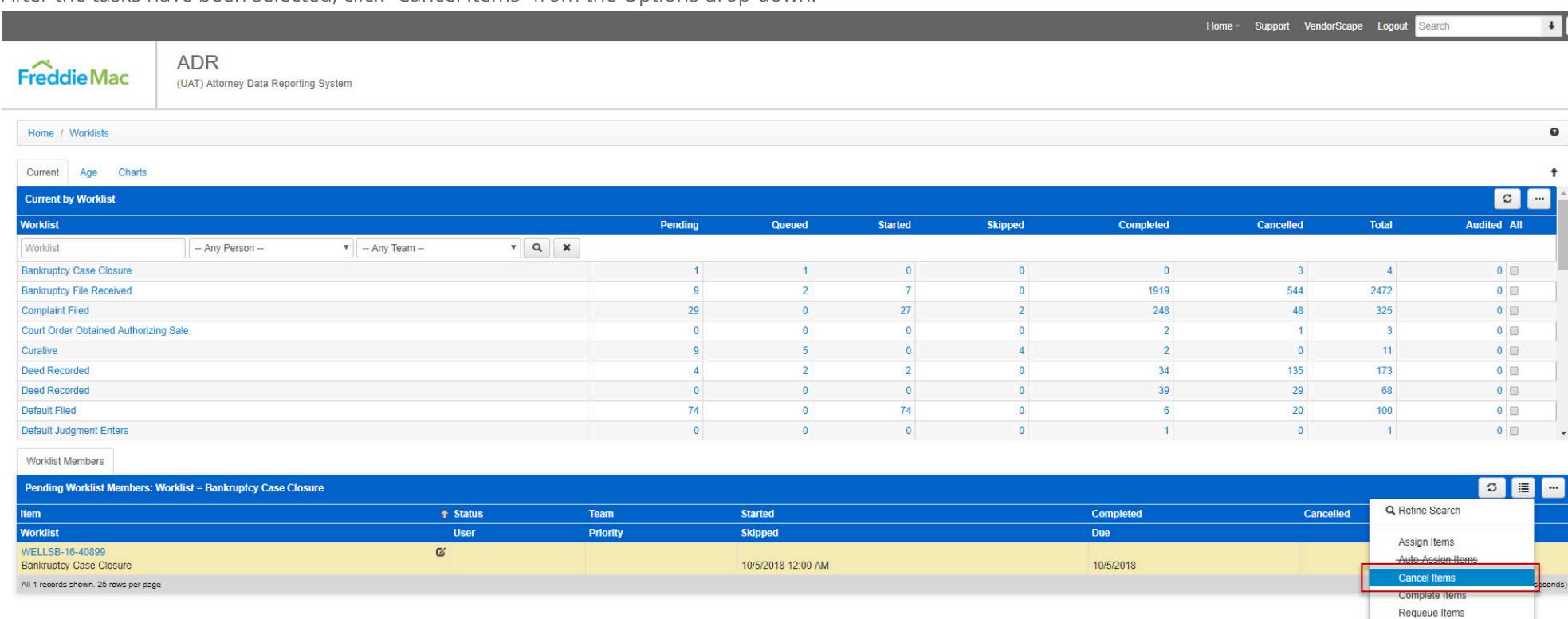
6. Completed items will not be shown under items in a "Pending" status, which can be selected from the Options drop-down menu

15.1.5 CANCEL AN ITEM IN THE SMART WOKLIST

Note: Performing this function forces the worklist item into cancelation, it does not cancel the underlying step tied to the task. This should only be done if any items are found in the worklist in error. For example, the Foreclosure case that the worklist item is tied to has been closed, but the item is still active in the list. Please use this worklist feature with caution.

Cancelling an item on the Smart Worklist will remove it from the "Show Pending" view of the worklist. If the task remains incomplete in the active file, it will remain incomplete until a user accesses the file to complete the task.

1. Select a task from the "Worklist" column in the "Summary by Worklist" panel.
2. In the "Items" panel, select the tasks that need to be cancelled by selecting the corresponding checkbox
3. After the tasks have been selected, click "Cancel Items" from the Options drop-down.



The screenshot shows the Freddie Mac ADR (UAT) Attorney Data Reporting System interface. The top navigation bar includes links for Home, Support, VendorScape, Logout, and a search bar. The main content area has a header 'ADR (UAT) Attorney Data Reporting System' and a sub-header 'Home / Worklists'. Below this, there are two main panels: 'Summary by Worklist' and 'Items'.

Summary by Worklist: This panel displays a table of worklists with various metrics: Pending, Queued, Started, Skipped, Completed, Cancelled, Total, Audited, and All. The table includes rows for Bankruptcy Case Closure, Bankruptcy File Received, Complaint Filed, Court Order Obtained Authorizing Sale, Curative, Deed Recorded, Default Filed, and Default Judgment Entered.

Items: This panel shows a list of pending worklist members for the 'Bankruptcy Case Closure' worklist. The table columns are Item, Status, Team, Started, Completed, and Cancelled. A single item, 'WELLSB-16-40899', is selected, indicated by a yellow background and a checked checkbox in the Status column. The 'Options' dropdown menu, located on the right, is open and shows the 'Cancel Items' option highlighted with a red box.

4. Once "Cancel Items" has been selected, the panel will automatically refresh and the task will have a "Cancelled" date.

Home / Worklists

Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Worklist	— Any Person —	— Any Team —							
Bankruptcy Case Closure	1	1	0	0	0	3	4	0	<input type="checkbox"/>
Bankruptcy File Received	9	2	7	0	1919	544	2472	0	<input type="checkbox"/>
Complaint Filed	29	0	27	2	248	48	325	0	<input type="checkbox"/>
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3	0	<input type="checkbox"/>
Curative	9	5	0	4	2	0	11	0	<input type="checkbox"/>
Deed Recorded	4	2	2	0	34	135	173	0	<input type="checkbox"/>
Deed Recorded	0	0	0	0	39	29	68	0	<input type="checkbox"/>
Default Filed	74	0	74	0	6	20	100	0	<input type="checkbox"/>
Default Judgment Enters	0	0	0	0	1	0	1	0	<input type="checkbox"/>

Worklist Members

Cancelled Worklist Members: Worklist = Bankruptcy Case Closure

Item	Status	Team	Started	Completed	Cancelled	All
Worklist	User	Priority	Skipped	Due		
WELLSB-16-40899	<input checked="" type="checkbox"/>			10/5/2018	10/4/2018	<input type="checkbox"/>
Bankruptcy Case Closure						
BK-MFR	<input checked="" type="checkbox"/>	Cancelled			2/22/2017	<input type="checkbox"/>
Bankruptcy Case Closure						
BK-POC	<input checked="" type="checkbox"/>	Cancelled			2/23/2017	<input type="checkbox"/>
Bankruptcy Case Closure						

5. Cancelled items will not be shown under items in a "Pending" status, which can be selected from the Options drop-down menu.

15.1.6 EXPORT THE SMART WORKLIST

1. Navigate to [Home](#) > [Worklists](#) from Home dropdown menu

Home / Loans

Loans

Loans

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	UPB Amount	Next Payment	Labels	All
Priority	City State Zip		Status	Servicer ID	Agency ID	Investor ID				

All 0 records shown. 25 rows per page

My Next Work Item

- Loans
- Foreclosures
- Bankruptcies
- Titles

Contacts

Import Files

Reports

Worklists

Next Payment

Labels

All

Last Payment

2. Select the desired Worklist you would like to export. In this example, 'Bankruptcy Case Closure' was selected, the items render in the 'Worklist Members' panel

Home / Worklists 

Current Age Charts

Current by Worklist

Worklist

Worklist  -- Any Person --  -- Any Team --  

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Bankruptcy Case Closure	0	0	0	0	0	4	4	0	0
Bankruptcy File Received	9	2	7	0	1919	544	2472	0	0
Complaint Filed	29	0	27	2	248	48	325	0	0
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3	0	0
Curative	9	5	0	4	2	0	11	0	0
Deed Recorded	0	0	0	0	39	29	68	0	0
Deed Recorded	4	2	2	0	34	135	173	0	0
Default Filed	74	0	74	0	6	20	100	0	0

Worklist Members

All Worklist Members: Worklist = Bankruptcy Case Closure							
Item	Status	Team	Started	Completed	Cancelled	All	
Worklist	User	Priority	Skipped	Due			
WELLSB-16-40899			10/5/2018 12:00 AM	10/5/2018	10/4/2018		
Bankruptcy Case Closure							
BK-MFR		Cancelled		2/23/2017	2/22/2017		
Bankruptcy Case Closure							
BK-POC		Cancelled		2/23/2017	2/22/2017		
Bankruptcy Case Closure							
test232		Cancelled		3/8/2017	3/7/2017		
Bankruptcy Case Closure							

All 4 records shown. 25 rows per page

(0.472 seconds)

3. Select 'Export to CSV' within the '...' dropdown menu to export the Smart Worklist.



Current Age Charts

Current by Worklist

Worklist	Pending	Queued	Started	Skipped	Completed	Cancelled	Total	Audited	All
Bankruptcy Case Closure	0	0	0	0	0	4	4	0	0
Bankruptcy File Received	9	2	7	0	1919	544	2472	0	0
Complaint Filed	29	0	27	2	248	48	325	0	0
Court Order Obtained Authorizing Sale	0	0	0	0	2	1	3	0	0
Curative	9	5	0	4	2	0	11	0	0
Deed Recorded	0	0	0	0	39	29	68	0	0
Deed Recorded	4	2	2	0	34	135	173	0	0
Default Filed	74	0	74	0	6	20	100	0	0

Worklist Members

All Worklist Members: Worklist = Bankruptcy Case Closure

Item	Status	Team	Started	Completed	Cancelled	Export to CSV
Worklist	User	Priority	Skipped	Due		
WELLSB-16-40899	Cancelled		10/5/2018 12:00 AM	10/5/2018	10/4/2018	
Bankruptcy Case Closure						
BK-MFR	Cancelled				2/23/2017	2/22/2017
Bankruptcy Case Closure						
BK-POC	Cancelled				2/23/2017	2/22/2017
Bankruptcy Case Closure						
test232	Cancelled				3/8/2017	3/7/2017
Bankruptcy Case Closure						

All 4 records shown. 25 rows per page (0.472 seconds)

SmartWorklistMem....csv

Show all



4. After selecting the file, you may review the Worklist in Microsoft Excel.

The screenshot shows a Microsoft Excel spreadsheet titled "SmartWorklistMember.D". The table has columns for SmartWorklistID, SmartWorklist, and several metrics: QueuedCount, StartedCount, CompleteCount, SkippedCount, and CancelledCount. The data rows list various legal actions and their counts, such as "20 Day statutory redemption period exp" with 711 queued and 255 started, and "Default decree obtained" with 2 queued and 0 started.

SmartWorklistID	SmartWorklist	QueuedCount	StartedCount	CompleteCount	SkippedCount	CancelledCount
1	SmartWorklist	711	255	78	304	1
2	1	0	0	0	0	73
3	196	0	2	0	0	0
4	153	0	0	0	4	0
5	212	0	3	1	0	0
6	84	0	9	0	0	0
7	65	0	6	2	0	0
8	247	0	1	0	0	0
9	56	0	20	0	0	14
10	57	0	16	0	0	11
11	262	0	1	0	1	0
12	191	0	2	0	0	0
13	77	0	33	21	9	1
14	263	0	1	0	0	0
15	195	0	2	0	0	0

16 REPORTS

16.1 GENERATING A REPORT

Home ▾ Support VendorScape Logout Search

My Next Work Item

Loans
Foreclosures
Bankruptcies
Titles

Contacts
Import Files
Reports All Reports + ↻ ✖ ...

Worklists

Global Portfolio View
Sales / Post. Overview

Labels All

1. Select Reports from the Home dropdown menu.

Home ▾ Reports / All Reports

Reports

Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown. 25 rows per page (0.281 seconds)

2. You are directed to the Report Request page

Home / Reports / All Reports

Hold (Attorney) Report Requests						
Label	Queued	Started	Completed	Recipients	Delivered	All
All 0 records shown. 25 rows per page (0.023 seconds)						

Reports

Report All

- ADR - 90 Day Task Inactivity
- ADR - Case Load Next Task Due
- ADR - Milestone Average
- Attorney Data Management
- Foreclosure Document Deficiency
- Hold (Attorney)**
- Litigation Detail
- Timeline Completion
- Timeline Exception
- Timeline Summary

All 10 records shown. 25 rows per page (0.035 seconds)

3. Click on the hyperlink for the report you need to generate. The Report Request panel is presented.

Home / Reports / All Reports

Hold (Attorney) Report Requests						
Label	Queued	Started	Completed	Recipients	Delivered	All
All 0 records shown. 25 rows per page (0.023 seconds)						

Reports

Report All

- ADR - 90 Day Task Inactivity
- ADR - Case Load Next Task Due
- ADR - Milestone Average
- Attorney Data Management
- Foreclosure Document Deficiency
- Hold (Attorney)
- Litigation Detail
- Timeline Completion
- Timeline Exception
- Timeline Summary

All 10 records shown. 25 rows per page (0.035 seconds)

+ New Hold (Attorney) Report

4. Select “+” to generate a new report.

5. Enter the following fields for the report you are generating:

- Label (*Name of Report*)
- Schedule (*Frequency of the Report*)
 - Run Once: Generates once

- Run Monthly: Generates monthly; Indicate the date the and time the report should be generated
- Run Weekly: Generates weekly; Indicate the day and time the report should be generated
- Recipients (*Report Recipients*)
 - Recipient field is populated with your email address. If other users should be notified of the report's availability, enter the email addresses in the additional recipients' field.
- Start Date
- End Date

The screenshot shows the Freddie Mac ADR interface. On the left, a sidebar lists various report types. The main area displays a dialog box titled "Hold (Attorney) Report Parameters". The dialog contains the following fields:

- Label:** TEST: Hold Report
- Schedule:** Run once (highlighted with a red box)
- Start Date:** 7/1/2018 (highlighted with a red box)
- End Date:** 7/31/2018 (highlighted with a red box)
- Recipients:** trottuser8@quandis.com
- Process Templates:** All
- Chapters:** All
- States:** All

 At the bottom of the dialog are "Submit" and "Cancel" buttons.

6. The following fields default to All:

- Process Templates
 - Report will include all Foreclosures on hold, all Motion for Relief actions that are on hold and all Proof of Claim actions that are on hold.
- Chapters
 - Report will include all Chapters
- States
 - Report will include all States

Reports

Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown. 25 rows per page (0.035 seconds)

Hold (Attorney) Report Parameters

Label:

Schedule: Run once
 Run weekly
 Run monthly (weekday)
 Run monthly (day)

Recipients: Additional email address

Start Date:
End Date:

Process Templates: All
 Chapters
 States

Submit **Cancel**

7. If you want to limit your report uncheck the "All" box to expand your options and select the appropriate boxes.

- Process Templates
- Chapters

Note: This checkbox is specific to Bankruptcy Process (i.e. Motion for Relief and Proof of Claim); If Foreclosure is selected, the Chapter checkboxes do not pertain, the boxes will be highlighted in red.

Process Templates: All Foreclosure Motion For Relief
 Proof Of Claim

Chapters: All 7 11
 12 13

States: All

- States

Home / Reports / All Reports

Reports

Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown, 25 rows per page (0.035 seconds)

Hold (Attorney) Report Parameters

Label:	TEST: Hold Report	Start Date:	7/1/2018
Schedule:	<input type="radio"/> Run once	End Date:	7/31/2018
	<input type="radio"/> Run weekly	Process Templates:	<input type="checkbox"/> All <input type="checkbox"/> Foreclosure <input type="checkbox"/> Motion For Relief
	<input type="radio"/> Run monthly (weekday)		<input checked="" type="checkbox"/> Proof Of Claim
	<input checked="" type="radio"/> Run monthly (day)	Chapters:	<input type="checkbox"/> All <input type="checkbox"/> 7 <input type="checkbox"/> 11
Day:	1		<input type="checkbox"/> 12 <input type="checkbox"/> 13
Time:	3 00 AM	States:	<input type="checkbox"/> All <input type="checkbox"/> Alaska <input type="checkbox"/> Alabama
Recipients:	trottuser8@quandis.com		<input type="checkbox"/> Arkansas <input type="checkbox"/> Arizona <input type="checkbox"/> California
			<input type="checkbox"/> Colorado <input type="checkbox"/> Connecticut <input type="checkbox"/> District of Columbia
			<input type="checkbox"/> Delaware <input type="checkbox"/> Florida <input type="checkbox"/> Georgia
			<input type="checkbox"/> Guam <input type="checkbox"/> Hawaii <input type="checkbox"/> Iowa
			<input type="checkbox"/> Idaho <input type="checkbox"/> Illinois <input type="checkbox"/> Indiana
			<input type="checkbox"/> Kansas <input type="checkbox"/> Kentucky <input type="checkbox"/> Louisiana
			<input type="checkbox"/> Massachusetts <input type="checkbox"/> Maryland <input type="checkbox"/> Maine
			<input type="checkbox"/> Michigan <input type="checkbox"/> Minnesota <input type="checkbox"/> Missouri
			<input type="checkbox"/> Mississippi <input type="checkbox"/> Montana <input type="checkbox"/> North Carolina
			<input type="checkbox"/> North Dakota <input type="checkbox"/> Nebraska <input type="checkbox"/> New Hampshire
			<input type="checkbox"/> New Jersey <input type="checkbox"/> New Mexico <input type="checkbox"/> Nevada
			<input type="checkbox"/> New York <input type="checkbox"/> Ohio <input type="checkbox"/> Oklahoma
			<input type="checkbox"/> Oregon <input type="checkbox"/> Pennsylvania <input type="checkbox"/> Puerto Rico
			<input type="checkbox"/> Rhode Island <input type="checkbox"/> South Carolina <input type="checkbox"/> South Dakota
			<input type="checkbox"/> Tennessee <input type="checkbox"/> Texas <input type="checkbox"/> Utah
			<input type="checkbox"/> Virginia <input type="checkbox"/> Virgin Islands <input type="checkbox"/> Vermont
			<input type="checkbox"/> Washington <input type="checkbox"/> Wisconsin <input type="checkbox"/> West Virginia
			<input type="checkbox"/> Wyoming

8. Click Submit once you have filled out the fields and checked the appropriate boxes.

Home / Reports / All Reports

Reports	
Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown. 25 rows per page (0.035 seconds)

Hold (Attorney) Report Parameters

Label:	TEST: Hold Report	Start Date:	7/1/2018
Schedule:	<input type="radio"/> Run once	End Date:	7/31/2018
	<input type="radio"/> Run weekly	Process Templates:	<input type="checkbox"/> All <input checked="" type="checkbox"/> Foreclosure <input type="checkbox"/> Motion For Relief
	<input type="radio"/> Run monthly (weekday)	Chapters:	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> 7 <input type="checkbox"/> 11
	<input checked="" type="radio"/> Run monthly (day)	12	<input type="checkbox"/> 13
Day:	1	States:	<input checked="" type="checkbox"/> All
Time:	3 00 AM		
Recipients:	trottuser8@quandis.com	Additional email address	
<input checked="" type="button"/> Submit <input type="button"/> Cancel			

9. You are directed to the Report Request page.

Home / Reports / All Reports

Reports	
Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown. 25 rows per page (0.035 seconds)

Hold (Attorney) Report Requests

Label	Queued	Started	Completed	Recipients	Delivered	All
TEST: Hold Report	7/24/2018 1:40 PM			trottuser8@quandis.com		<input type="checkbox"/>

10. When the report has generated and is ready to view the delivered date will be populated.

Home / Reports / All Reports

Hold (Attorney) Report Requests					
Label	Queued	Started	Completed	Recipients	Delivered
TEST: Hold Report	7/24/2018 1:42 PM	7/24/2018 1:42 PM	7/24/2018 1:42 PM	aangle@quandis.com, trottuser8@quandis.com	7/24/2018 1:42 PM (0.025 seconds)

All 1 records shown. 25 rows per page

Reports

Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown. 25 rows per page (0.035 seconds)

16.2 VIEWING A REPORT

16.2.1 REPORT REQUEST PAGE

1. Click on the bars next to the report name.

Home / Reports / All Reports

Hold (Attorney) Report Requests					
Label	Queued	Started	Completed	Recipients	Delivered
TEST: Hold Report	7/24/2018 1:42 PM	7/24/2018 1:42 PM	7/24/2018 1:42 PM	aangle@quandis.com, trottuser8@quandis.com	7/24/2018 1:42 PM (0.025 seconds)

All 1 records shown. 25 rows per page

Click to view reports

Reports for TEST: Hold Report

Document	Created	All
Holds	7/24/2018 1:42 PM	<input type="checkbox"/>

All 1 records shown. 25 rows per page (0.48 seconds)

Reports

Report	All
ADR - 90 Day Task Inactivity	<input type="checkbox"/>
ADR - Case Load Next Task Due	<input type="checkbox"/>
ADR - Milestone Average	<input type="checkbox"/>
Attorney Data Management	<input type="checkbox"/>
Foreclosure Document Deficiency	<input type="checkbox"/>
Hold (Attorney)	<input type="checkbox"/>
Litigation Detail	<input type="checkbox"/>
Timeline Completion	<input type="checkbox"/>
Timeline Exception	<input type="checkbox"/>
Timeline Summary	<input type="checkbox"/>

All 10 records shown. 25 rows per page (0.035 seconds)

2. The report request appears in the Report panel, select the hyperlink of the report you wish to open.

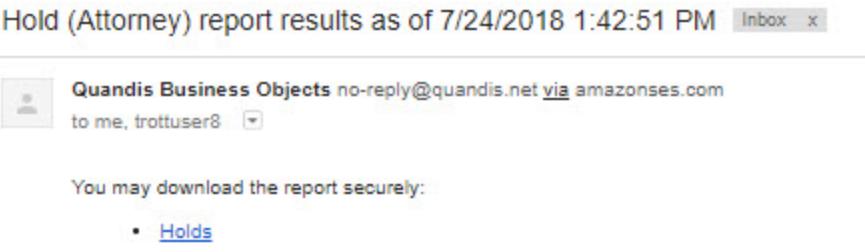
3. The report will open in an excel spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	State	CaseType	Attorney	Servicer	Reason	Chapter	Investor #	Servicer #	Attorney #	Opened	Hold Start	Hold End	Days	Followup
2	CA	Foreclosure		ACME	Account Current				Test123	04/11/2013	04/11/2013		142	04/27/2013
3	CA	Foreclosure		ACME	I am testing this		450691324		Test456	04/11/2013	04/11/2013		142	04/27/2013
4	CA	Foreclosure		BANK OF AMERICA, N.A.	Bankruptcy Ch 7	063719606	122153	909090909		04/11/2013	04/11/2013		142	05/25/2013
5	CA	Foreclosure		BANK OF AMERICA, N.A.	Bankruptcy Ch 7	063719606	122153	9999999		04/11/2013	04/25/2013		128	05/31/2013
6	CA	Foreclosure		Ocwen Loan Servicing, LLC	Bankruptcy Ch 7	012182966	277105	78098765		04/10/2013	04/11/2013		142	04/11/2013
7	CA	Proof Of Claim		ACME	BK Hold	13		18342923	<>Auto>>	05/07/2013	06/01/2013		91	06/30/2013
8	NJ	Motion For Relief		ACME	Stip/APO	11		7830201	<>Auto>>	05/21/2013	05/21/2013		102	06/01/2013
9	NY	Foreclosure		ACME	Account Current		112233	56476hgdhgdbvbxcc		04/10/2013	05/01/2013	05/01/2010		06/01/2013
10	NY	Foreclosure		ACME	Adequate Protection Order		112233	56476hgdhgdbvbxcc		04/10/2013	05/01/2013		122	05/31/2013
11	NY	Foreclosure		ACME	Bankruptcy Ch 11		410377048	4545454544		04/26/2013	05/01/2013	05/01/2010		07/19/2013
12	NY	Foreclosure		ACME	Bankruptcy Ch 13		18342923	13-9098uhj		04/25/2013	05/31/2013		92	08/31/2013
13	NY	Foreclosure		ACME	Bankruptcy Ch 7		18342923	13-456789		07/02/2013	07/02/2013		60	10/02/2013
14	NY	Foreclosure		ACME	Bankruptcy Ch 7		410377048	4545454544		04/26/2013	05/01/2013		122	05/31/2013
15	NY	Foreclosure		ACME	Bankruptcy Ch 7		628075515	13		04/25/2013	05/01/2013	05/01/2010		05/24/2013
16	NY	Foreclosure		ACME	Cramdown		1723537	23-hhdd		05/01/2013	05/01/2013	05/01/2010		05/31/2013
17	NY	Foreclosure		ACME	Cramdown		628075515	13		04/25/2013	02/25/2013	05/01/20165		05/31/2013
18	NY	Foreclosure		ACME	Credit Counseling		1723537	23-hhdd		05/01/2013	05/01/2013		122	05/31/2013
19	NY	Foreclosure		ACME	Credit Counseling		628072927	13-85hbv xvgfgf		04/26/2013	05/01/2013	05/01/2010		05/31/2013

1. The email will be from no-reply@quandis.com

2. The subject line of the report will be the name of the report, the date it was generated and the time the report was generated.

3. Click on the report name hyperlink contained in the email.



The screenshot shows an email inbox with a single message. The subject line is "Hold (Attorney) report results as of 7/24/2018 1:42:51 PM". The email is from "Quandis Business Objects no-reply@quandis.net via amazoneses.com" and is addressed "to me, trottuser8". Below the subject line, there is a link "You may download the report securely:" followed by a bullet point "• [Holds](#)".

4. If you are not logged into the system, you will be directed to the log in page. If you are logged into the system, the report will be available for you to download.

5. Once you enter user name and password on the log in page, the report will be presented to you to download.

16.3 REPORT DEFINITIONS

16.3.1 ADR - 90 DAY TASK INACTIVITY

The ADR 90 Day Task Inactivity provides a list of cases for which the tasks have had no activity (i.e. reprojected) for 90 days. This report will exclude any cases that have an active hold

The following fields are included in the report:

Field Name	Description
Loan	Freddie Mac loan number
LoanStatus	Loan Status
Servicer	The loan's servicer
ServicerLoan	Servicer Loan Number
ServicerNumber	Servicer ID

Attorney	Attorney
AttorneyCaseID	Attorney Case ID
State	State location of the property
ForeclosureID	Foreclosure ID
Status	Status (Open or Closed)
DecisionID	Decision ID
ImportForm	Import Form (Foreclosure File Received, Sale Scheduled, etc)
ProjectedCompletionDate	Estimate completion date
ElapsedDays	Number of days elapsed
ElapsedDaysGrouping	

16.3.2 ADR – CASE LOAD NEXT TASK DUE

The ADR Case Load Next Task Due is a report that shows all active cases assigned to each firm that the requester has access to. It shows the next task that is due within the next 365 days for each case as well as additional information.

The following fields are included in the report:

Field Name	Description
FMLoan	Freddie Mac loan number
AttorneyFirm	Attorney Firm
Servicer	The loan's servicer
ServicerLoan	Servicer loan number

CaseType	Type of case, foreclosure or bankruptcy
CaseID	The firm's internal "Case Number"
Address	The property's address
City	City location of the property
State	State location of the property
PostalCode	Postal code for the property
CaseOpen	The "Start Date" for the case, set by the firm
NextDueTask	The case's next task that requires completion
TaskEstimatedCompletion	The estimated completion date for the case's next task
TaskProjectedCompletion	The projected completion date for the case's next task
ActiveDelays	YES/NO confirming if case is on hold
ActiveDelayProjectedCompletion	Projected completion date of the hold (if applicable)

16.3.3 ADR - MILESTONE AVERAGE

16.3.4 FORECLOSURE DOCUMENT DEFICIENCY

The Foreclosure Document Deficiency report provides a list of all cases where the Foreclosure Sale Scheduled Task has been completed and required documents are missing.

The following fields are included in the report:

Field Name	Description
------------	-------------

ForeclosureID	Foreclosure ID
AttorneyCaseNumber	Attorney Case Number
FreddieLoanNumber	Freddie Mac loan number
ServicerName	Servicer Name
Servicer Loan ID	Servicer Loan ID
ServicerLoanNumber	Servicer Loan Number
AttorneyName	Attorney firm
DaysPastDue	Days Past Due
FCProjectedSaleDate	Foreclosure Projected Sale Date
FCSaleDate	Foreclosure Sale Date
FCSaleType	Foreclosure Sale Type
MotionForFinalRatificationOfSaleFiledDate	Motion for Final Ratification of Sale File Date
FCMethod	Foreclosure Method
State	State
MissingDocuments	Missing Documents

16.3.5 HOLD REPORT

The hold report is a report for all process that have been placed on hold or removed from hold based on the start date and end date.

The following fields are included in the report:

Field Name	Description
State	
Case Type	This is the same as the Process Template. This field will either be displayed as Foreclosure, Motion For Relief or Proof Of Claim
Attorney	This field is your organization name as it appears in ADR
Attorney #	Attorney #
Servicer	This is the name of the servicer as it appears in ADR
Reason	This is the Reason that was selected when the hold was created
Chapter	If the hold is on a Proof of Claim or Motion for Relief, the bankruptcy chapter will be listed
Investor#	This is the Freddie Mac loan number
Servicer Loan #	This is the Servicer's loan number as it appears in ADR
Opened	This field represents the date the Foreclosure was opened
Hold Start	This field is the start date based on the date that was entered when the hold was activated in the system
Hold End	This is the date the hold was removed.
Days	Represents the number of days the file was/is on hold. The calculation is Hold End Date (or current date if the hold has not ended) – Hold Start Date
Follow-up	This field represents the Hold's projected end date

Foreclosure Holds for 0123100000							Options
Delay	Start	Projected	End	Days	All		
Account Current	4/11/2013	4/27/2013		126			(1.273 seconds)
All 1 records shown.							
Report Fields	Reason	Hold Start	Follow Up	Hold End	Days		

16.3.6 LITIGATION DETAIL REPORT

The litigation report lists tasks that were either completed or remain opened based on the date range selected. Tasks that have a projected completion date will have an asterisk (*) in front of the date.

The following fields are included in the report:

Field Name	Description
Subtype	If the Decision is bankruptcy related; this field will represent the bankruptcy chapter
Chapter	If the Decision is bankruptcy related, this field will be the bankruptcy chapter
Decision	This relates to the Timeline Template. This will be displayed as Proof of Claim, Motion for Relief or Judicial or NonJudicial foreclosure. This is reflective of the type selected whenever the foreclosure was activated
Attorney	This is your organization name as it appears in ADR
Agency Loan ID	This field represents the Freddie Mac loan number
Borrower	This is the name of the first borrower listed in the borrower panel
Servicer	This field represents the name of the servicer as it appears in ADR
DecisionStep	This is the task that needs to be completed

Estimated Duration	This field represents the number of days the task should take to complete
Sequence	This field identifies the order in which the Decision Step takes place
Completion Date	This is either the Actual Completion date or the Projected Completion date. If the date is a Projected Completion date, an Asterisk (*) will precede the date
Completion Days	This represents the actual number of days to complete the task or the current number of days the task is delayed if the task does not have an actual completion date
Delay count	This field is internal to Freddie Mac's use
Completion Date Format	This field is internal to Freddie Mac's use
Status	This field identifies if the Decision is Open-O, On Hold-OH or Closed-C. The status is based on the Removal Date
Status Number	Please disregard this field as it is for internal use
State	This field represents the state the subject dwelling is located

16.3.7 TIMELINE COMPLETION REPORT

The Timeline Completion report lists foreclosures or bankruptcies that have completed or have an estimated completion date for the date range selected in the report query.

The following fields are included in the report:

Field Name	Description
Decision	This relates to the Timeline Template. This will be displayed as Proof of Claim, Motion for Relief or Judicial or NonJudicial foreclosure. This is reflective of the type selected whenever the foreclosure was activated
Organization	This is your organization name as it appears in ADR
Agency Loan ID	This field represents the Freddie Mac loan number

Borrower	This field is the first borrower that is listed in the borrower panel on the loan summary page
Days to Complete	This represents the actual number of days to complete the foreclosure or the current number of days the foreclosure has been open if there is not an actual completion date
Date Closed	This is the date the foreclosure was closed

16.3.8 TIMELINE EXCEPTION REPORT

The Timeline Exception report lists tasks that are out of compliance and need to be completed.

The following fields are included in the report:

Field Name	Description
Decision	This relates to the Timeline Template. This will be displayed as Proof of Claim, Motion for Relief or Judicial or NonJudicial foreclosure. This is reflective of the type selected whenever the foreclosure was activated
Organization	This is your organization name as it appears in ADR
Decision Step	This is the task that needs to be completed
Event Phase	Event Phase
Agency Loan ID	This field represents the Freddie Mac loan number
Borrower	This field is the first borrower that is listed in the borrower panel on the loan summary page
Attorney Case ID	This field represents your case number
Days on Hold	The information in this field represents the number of days the action was on hold
Days to Complete	This field represents the number of days the decision step has been opened

Estimated Days	Represents the number of days allowed to complete the task based on the Timeline Template
Days Late	This field is the total number of days the task is late
Status	This field identifies if the Decision is Open-O, On Hold-OH or Closed-C. The status is based on the Removal Date
State	This field represents the state the property is located
SubType	The sub type field will indicate the bankruptcy chapter if the decision step listed is a bankruptcy

16.3.9 TITLE DATA REPORT

The Title Data report provides summary level data for titles.

The Title Data can be filtered based on the following criteria:

Field Name	Description
LoanStatus	Status of Loan
NewOrUpdate	New or Update
FreddieMacLoanNumber	Freddie Mac Loan Number
ServicerLoanNumber	Servicer Loan Number
CaseNumber	Title Name/Number
TypeOfCase	Title Type (e.g. Loan Mod, Deed In Lie, Foreclosure)
DateOrdered	Date Ordered
DateEstimated	Dated Estimated
DateRevised	Date Revised

DateReceived	Date Title Received
DateCancelled	Date Title Cancelled
SentForRecordingDate	Sent for Recording Date
AttorneyFirm	Attorney Firm Name
TitleCompany	Title Company Name
REOClosingAgent	REO Closing Agent
ServicerName	Servicer Name
PropertyState	State of Propert
NumberOfDaysOutstanding	Calculated based on Date ordered to report run date
NumberOfDaysOverdue	Calculated based on estimated or revised date to report run date
NumberOfDaysToClosed	Calculated based on Date ordered to Actual Close date
NumberOfDaysToCancelled	Calculated based on Date ordered to cancelled date

17 DASHBOARDS

17.1 EXPORT TO EXCEL (CSV)

ADR users have the ability to export case lists as a spreadsheet to Excel. This can be done by accessing any panel that contains a list (messages, file types, borrower data, etc).

1. For example, if you were to choose [Home > Foreclosures](#), you will see a panel with all file types you have access to. File types being On Hold, Open, etc. In the example below, we have chosen 2 under 'On Hold' column for 'Marinosci Law Group, PC – CT'
2. Once selected, the results appear in the panel on the bottom half of the page. Notice the "..." in the top right corner of this panel.

Pivot: Status by Assigned Organization

Assigned Organization	-	On Hold	Open	Total
Marinosci Law Group, PC - CT		2	33	35
6-28 UAT Test #XX - CT		1	15	16
McCalla Raymer Pierce, LLC - GA	45	57	158	260
Stern & Eisenberg, PC - NJ	29		116	145
Weinstein & Riley, P.S. - CO			2	2
Total	74	60	324	458

(cached 04 Oct 13:38)

Foreclosures

Status = On Hold, Assigned Organization = Marinosci Law Group, PC - CT

Case #	Servicer	Agency	Borrower	Address	Court	Type	Date Opened	Date Closed	Change Status		
Attorney	Loan #	Loan #		City	State	Postal Code	Court Case #	Status	Scheduled Sale	Closed Reason	Change Type
287099 Marinosci Law Group, PC - CT	<input checked="" type="checkbox"/> U.S. BANK N.A. <input checked="" type="checkbox"/> 6830021098	<input checked="" type="checkbox"/> Freddie Mac <input checked="" type="checkbox"/> 511213107	Tigano, Jr., William Tigano, Joyce	407 WEBB CIRCLE MONROE, CT 06468			FBT-CV-16-6055744-S	On Hold	6/13/2013		<input checked="" type="checkbox"/> Export to CSV <input checked="" type="checkbox"/> Export to Excel
289979 Marinosci Law Group, PC - CT	<input checked="" type="checkbox"/> U.S. BANK N.A. <input checked="" type="checkbox"/> 6830059656	<input checked="" type="checkbox"/> Freddie Mac <input checked="" type="checkbox"/> 605983518	Galer, Lewis	55 THOMPSON ST UNIT 16E EAST HAVEN, CT 06513			NNH-CV-16-6063761-S	On Hold	9/23/2013		<input checked="" type="checkbox"/> Export to CSV <input checked="" type="checkbox"/> Export to Excel

All 2 records shown. 25 rows per page

Context menu options:

- Change Status
- Change Type
- Export to CSV
- Export to Excel
- Delete
- Help

- From there, click 'Export to CSV' or 'Export to Excel', which will then trigger the process of downloading an Excel file.
- You may find this file in the Downloads folder, or if you are using Google Chrome, you may see it in your task bar at the bottom of your browser page, like the image shown above. Keep in mind that this function works in every panel with the "..." and the 'Export to CSV' or 'Export to Excel' options.

17.2 ADVANCED SEARCH FILTERING

- Users can filter their dashboard using the Advanced Search options (the arrow icon) located next to the Search bar.
- Using one of the available search fields, you may look up files or loans by Servicer, State, Investor Number (Freddie Mac Number) or Status. However, should you wish to keep it simple, you may just enter the 9-digit Freddie Mac Loan Number (Investor Number) in the Search Box and ignore the Advanced Loan search by ignoring the Arrow icon all together.



Assigned Organization

		On Hold	Open
Marinosci Law Group, PC - CT		2	33
6-28 UAT Test #XX - CT		1	15
McCalla Raymer Pierce, LLC - GA	45	57	158
Stern & Eisenberg, PC - NJ	29		116
Weinstein & Riley, P.S. - CO		2	
Total	74	60	324

Status = On Hold, Assigned Organization = Marinosci Law Group, PC - CT

Case #		Servicer	Agency	Borrower	Address		Court	Type	Date Opened
Attorney	Loan #	Loan #		City	State	Postal Code	Court Case #	Status	Scheduled Sale
287099 Marinosci Law Group, PC - CT	U.S. BANK N.A. 6830021098	Freddie Mac 511213107	Tigano, Jr, William Tigano, Joyce	407 WEBB CIRCLE MONROE, CT 06468			FBT-CV-16-6055744-S	On Hold	6/13/2013
289979 Marinosci Law Group, PC - CT	U.S. BANK N.A. 6830059656	Freddie Mac 605983518	Galer, Lewis	55 THOMPSON ST UNIT 16E EAST HAVEN, CT 06513			NNH-CV-16-6063761-S	On Hold	9/23/2013

All 2 records shown. 25 rows per page

Foreclosure Search

ID:	<input type="text"/>
Case Number:	<input type="text"/>
Court Case Number:	<input type="text"/>
Servicer Loan:	<input type="text"/>
Agency Loan:	<input type="text"/>
Scheduled Sale:	<input type="text"/>
State:	<input type="text"/>
Status:	<input type="text"/>
Address:	<input type="text"/>
UPB Amount:	<input type="text"/>
Filters:	<input type="checkbox"/> Active <input type="checkbox"/> Active Status <input type="checkbox"/> Active Workflow <input type="checkbox"/> Attorney ID List <input type="checkbox"/> Can Delete <input type="checkbox"/> Can Insert <input type="checkbox"/> Can Update <input type="checkbox"/> Closed <input type="checkbox"/> Exclude Pending Steps <input type="checkbox"/> Final Status <input type="checkbox"/> Litigation Delays <input type="checkbox"/> Message Template Priority <input type="checkbox"/> Non Compliant <input type="checkbox"/> On Hold <input type="checkbox"/> Open <input type="checkbox"/> Other Delays <input type="checkbox"/> Property State <input type="checkbox"/> Servicer ID <input type="checkbox"/> Servicer ID List <input type="checkbox"/> Step Exists <input type="checkbox"/> Unread Notifications

18 STATE WORKFLOW

- Workflow Steps are included to show all steps per state.
- Struck through items have been deprecated
- Bold items** have been added
- Items with both strike through and **bold** in the same cell have been renamed

Foreclosure – AK Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgement
	Sale Scheduled
	Foreclosure Sale Held
	Certificate of Sale Recorded
	Foreclosure Case Closure
Foreclosure – AK Non Judicial	Foreclosure File Received
	Notice of Default Recorded
	Publication/Posting of Sale completed
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – AL Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgement Filed
	Sale Scheduled

	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - AL Non Judicial	Foreclosure File Received
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - AR Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Court Decree/Judgement
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - AR Non Judicial	Foreclosure File Received
	Notice of Default Filed
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure

Foreclosure - AZ Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Sale Scheduled
	Foreclosure Sale Held
	Certificate of Sheriff's Sale
	Deed Issued
	Foreclosure Case Closure
Foreclosure - AZ Non Judicial	Foreclosure File Received
	Record Notice of Trustee's Sale
	Trustee Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - CA Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Redemption Period Expires

	Deed Recorded
	Foreclosure Case Closure
Foreclosure - CA Non Judicial	Foreclosure File Received
	Record Notice of Default
	Posting and Publishing of Sale/NOS Mailings
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - CO Non Judicial	Foreclosure File Received
	Sale Scheduled/NED Recorded
	Notice of Election and Demand Sent to Public Trste
	Court Order Obtained Authorizing Sale
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - CT Judicial	Foreclosure File Received
	Service of Process Completed
	Complaint Filed
	Motion for Judgment of Foreclosure Filed

	Foreclosure by Sale Decree Entered
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – DC Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Initial Scheduling Conference
	Foreclosure Mediation Program
	Status Conference
	Motion for Judgment of Foreclosure Filed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure – DC Non Judicial	Foreclosure File Received
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure

Foreclosure – DE Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Judgment of Foreclosure Filed
	Sale Scheduled
	Foreclosure Sale Held
	Confirmation of Sale
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – FL Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment Filed
	Judgment Entered
	Sale scheduled date (tied to Judgment entered)
	Foreclosure Sale Held
	Certificate of Title Issued
	Foreclosure Case Closure
Foreclosure – GA Non Judicial	Foreclosure File Received
	Sale Scheduled

	First Publication
	Mail Notice of Sale to Borrower
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - HI Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment and Decree of FC Filed
	Confirmation of Sale
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - HI Non Judicial	Foreclosure File Received
	Sale Scheduled
	Publication and Posting of Sale Completed
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - IA Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed

	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Redemption Period Expires/Deed Recorded
	Foreclosure Case Closure
Foreclosure - ID Non Judicial	Foreclosure File Received
	File Notice of Default
	Sale Scheduled
	Publication/Posting on Property Completed
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - IL Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	File Motion for Judgment of Foreclosure
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded

	Foreclosure Case Closure
Foreclosure - IN Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - KS Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - KY Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment and Order of Sale Entered

	Sale Scheduled
	Foreclosure Sale Held
	Confirmation of Sale
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - LA Judicial Exec	Foreclosure File Received
	Petition for Seizure and Sale of Property Filed
	Writ of Seizure and Sale Issued
	Sheriff Seized Property
	Notice of Sale Publication started
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - LA Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Default/Summary Judgment Filed
	Sheriff Seized Property
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded

	Foreclosure Case Closure
Foreclosure - MA Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Order of Notice Received from Land Court
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - MD Judicial	Foreclosure File Received
	Complaint (Order to Docket) Filed
	Service of Process Completed
	Sale Scheduled
	Foreclosure Sale Held
	Motion for Final Ratification of Sale Filed
	Foreclosure Case Closure
Foreclosure - ME Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered

	Period of Redemption Expires
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - MI Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Publication of the Notice of Foreclosure
	Sale Scheduled
	Foreclosure Sale Held
	Confirmation of Sale
	Foreclosure Case Closure
Foreclosure - MI Non Judicial	Foreclosure File Received
	Sale Scheduled
	Publication Complete
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - MN Judicial	Foreclosure File Received

	Complaint Filed
	Service of Process Completed
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure – MN Non Judicial	Foreclosure File Received
	Notice of Pendency Filed
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure – MO Non Judicial	Foreclosure File Received
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – MS Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled

	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure – MS Non Judicial	Foreclosure File Received
	Notice of Default Sent
	Substitution of Trustee Executed and Recorded
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – MT Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure – MT Non Judicial	Foreclosure File Received
	Sale Scheduled
	Notice of Trustee's Sale served by Certified Mail
	Affidavits of Notice of Sale Compliance Filed

	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - NC Non Judicial	Foreclosure File Received
	Notice of Hearing (NOH) Filed
	Notice of Hearing Service Completed
	Hearing Held
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - ND Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - NE Judicial	Foreclosure File Received

	Complaint Filed
	Service of Process Completed
	Sale Scheduled
	Foreclosure Sale Held
	Confirmation of Sale
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – NE Non Judicial	Foreclosure File Received
	Notice of Default Recorded
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – NH Non Judicial	Foreclosure File Received
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – NJ Judicial	Foreclosure File Received
	Complaint Filed

	Service of Process Completed
	Default Filed
	Judgment Entered / Writ of Execution
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - NM Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - NV Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Notice of Sheriff's Sale and Posting of Sale
	Foreclosure Sale Held

	Deed Recorded
	Foreclosure Case Closure
Foreclosure - NV Non Judicial	Foreclosure File Received
	Record Notice of Default
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - NY Co-op	Foreclosure File Received
	Title Report Received
	Preliminary Title Clear
	Notice of Default Sent
	First Publication
	Sale Scheduled
	Final Title Clear
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - NY Judicial	Foreclosure File Received
	Complaint Filed
	Service Complete

	Aff of Service, RJI, Attorney Affirmation Filed
	Mandatory Settlement Conference Completed
	Motion to Appoint Referee to Compute Filed
	Judgment of Foreclosure and Sale Entered
	Sale Scheduled
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - OH Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Judgment Filed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Order of Confirmation
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - OK Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed

	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Sale Confirmed
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - OR Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - OR Non Judicial	Foreclosure File Received
	Sale Scheduled and Notice of Default Sent
	Publication and Posting of Sale Completed
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure

Foreclosure – PA Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – PR Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment Filed
	Judgment Entered
	Writ of Execution
	Notice of Sale
	Foreclosure Sale Held
	Sale Deed Executed
	Foreclosure Case Closure
Foreclosure – RI Non Judicial	Foreclosure File Received
	Expiration of 30 Day Statutory Notice Period

	Publication of the Notice of Foreclosure
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - SC Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Order of Reference Entered and Hearing Scheduled
	Judgment Entered
	Sale Complete
	Redemption Period Expires
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - SD Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held

	Redemption Period Expires
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - TN Non Judicial	Foreclosure File Received
	Sale Scheduled
	Substitution of Trustee Recorded
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - TX Home Eq	Foreclosure File Received
	Application for Expedited Order to Allow FCL Filed
	Foreclosure Order and Affidavit
	Signed Order Received
	Posting to Sale Held
	Foreclosure Sale Held
	Foreclosure Case Closure
Foreclosure - TX Non Judicial	Foreclosure File Received
	Post Notice of Sale
	File Foreclosure Notice with County Clerk
	Sale Scheduled

	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – UT Non Judicial	Foreclosure File Received
	Expiration of 3 Month Reinstatement Period
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – VA Non Judicial	Foreclosure File Received
	Sale Scheduled
	Publication and Posting of Sale Completed
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – VI Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment Filed
	Judgment Entered

	Writ of Execution
	Notice of Sale
	Foreclosure Sale Held
	Sale Deed Executed
	Foreclosure Case Closure
Foreclosure - VT Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment Filed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Sale Confirmed
	Deed Recorded
	Foreclosure Case Closure
Foreclosure - WA Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled

	Foreclosure Sale Held
	Deed Recorded
	Redemption Period Expires
Foreclosure Case Closure	
Foreclosure – WA Non Judicial	Foreclosure File Received
	Notice of Sale Recorded
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
Foreclosure Case Closure	
Foreclosure – WI Judicial	Foreclosure File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Redemption Period Expires
	Sale Scheduled
	Foreclosure Sale Held
	Confirmation of Sale
	Deed Recorded
Foreclosure Case Closure	

Foreclosure – WV Non Judicial	Foreclosure File Received
	Trustee Sale Scheduled
	Notice of Sale Mailed
	Foreclosure Sale Held
	Deed Recorded
	Foreclosure Case Closure
Foreclosure – WY Non Judicial	Foreclosure File Received
	Sale Scheduled
	Foreclosure Sale Held
	Certificate of Sale Recorded
	Redemption Period Expires
	Foreclosure Case Closure
Bankruptcy – Motion For Relief	Bankruptcy File Received
	Relief from Stay/Discharge
	Bankruptcy Case Closure
Bankruptcy – Proof Of Claim	Bankruptcy File Received
	POC Filed
	Plan Confirmed
	Bankruptcy Case Closure

