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 Tile 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

TABLE OF CONTENTS

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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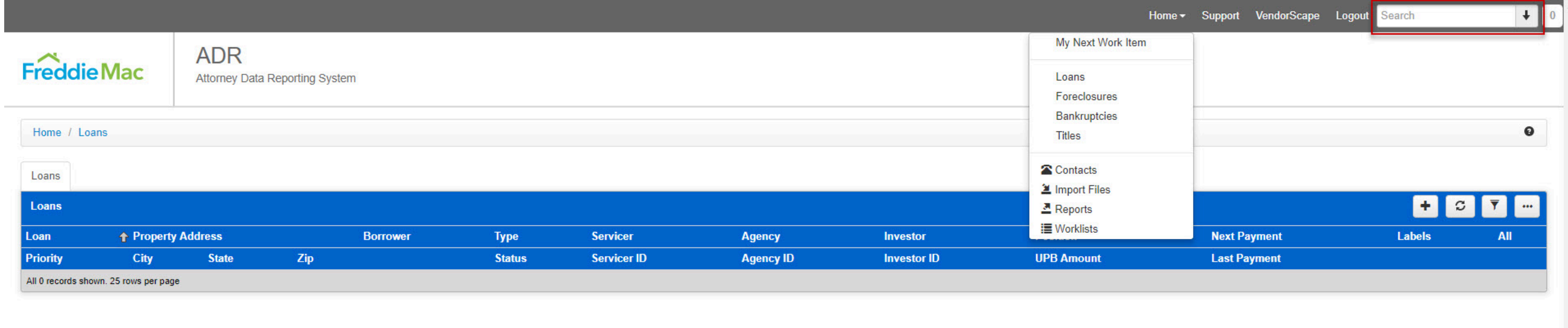
0 LOCATING A LOAN

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.



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.

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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.

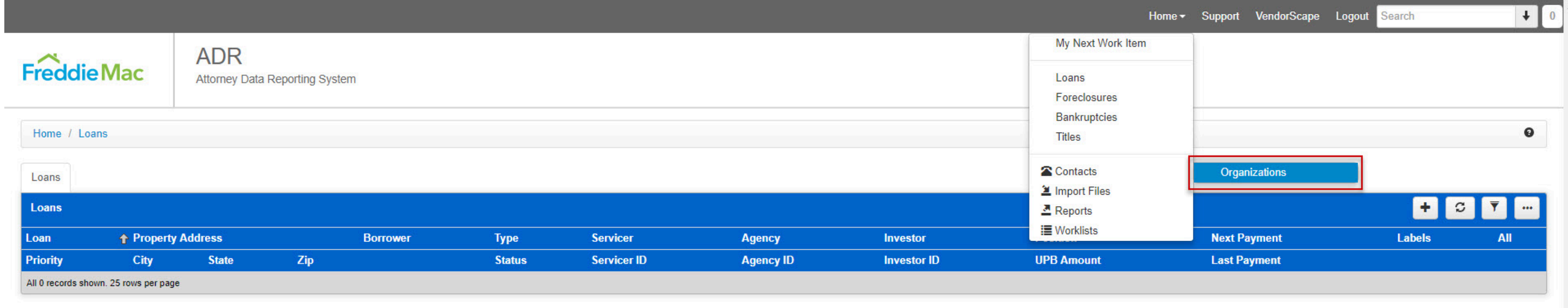
There are 2 roles: Security Administrator and Attorney.

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

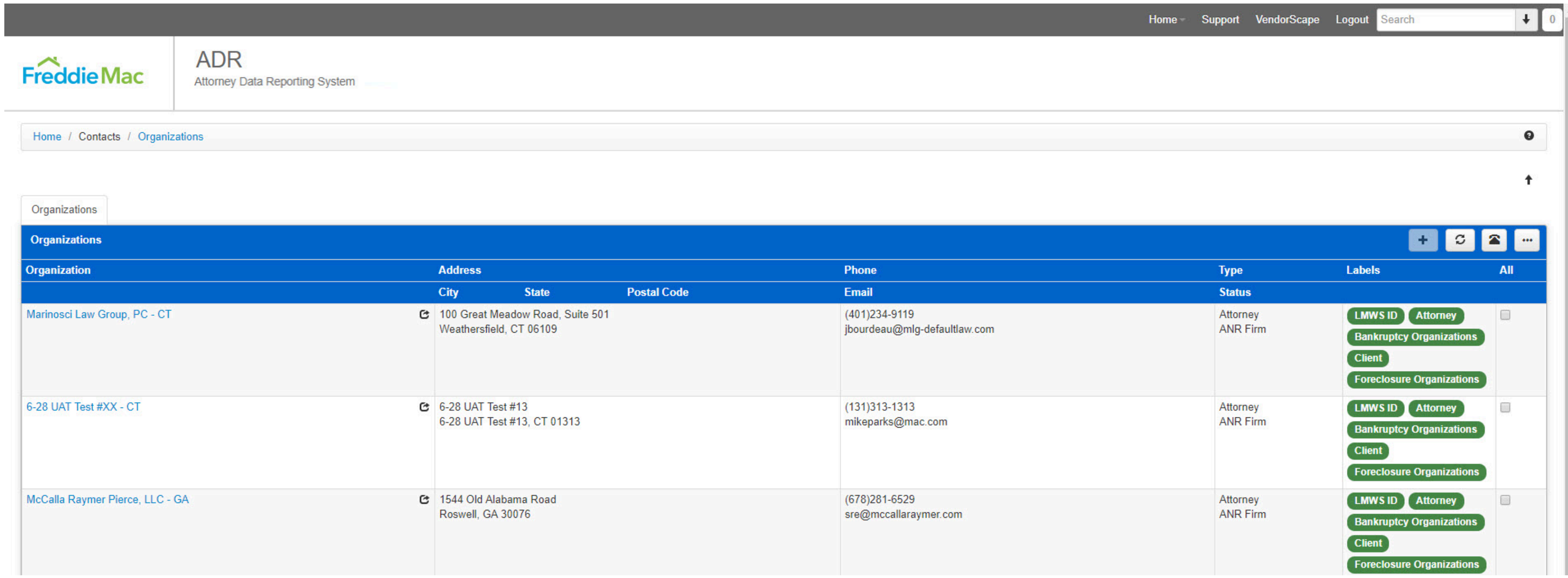
The Attorney role is reserved for users who need to view loans associated with their company in the ADR system.

1.1 ADDING USERS

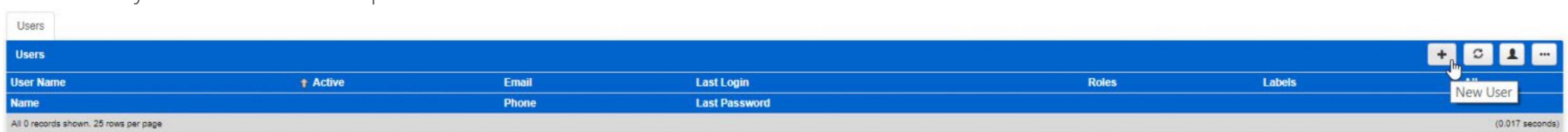
1. Select Organizations from the Contacts drop-down.



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.



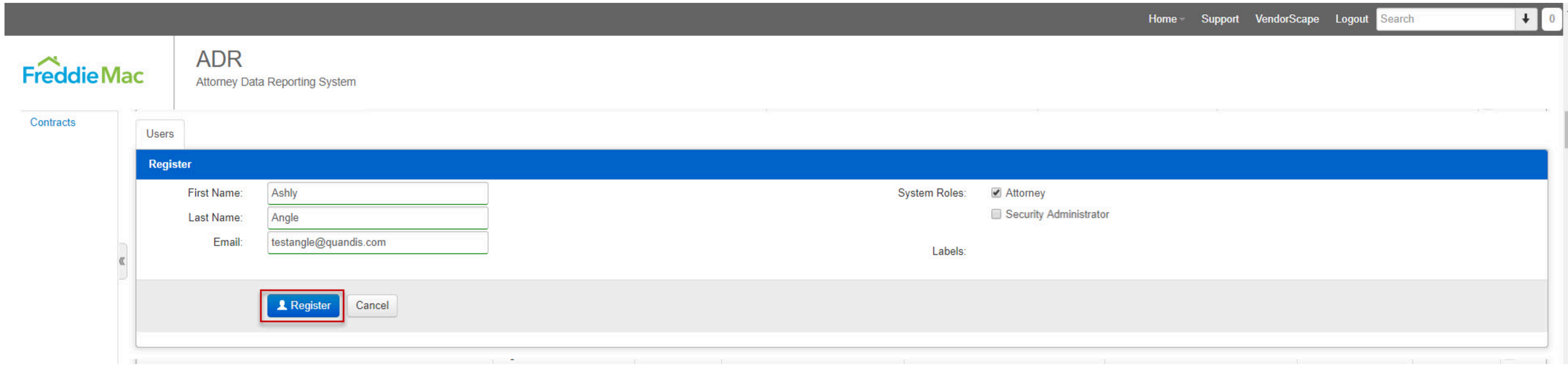
3. Select the '+' symbol within the "Users" panel to add a New User.



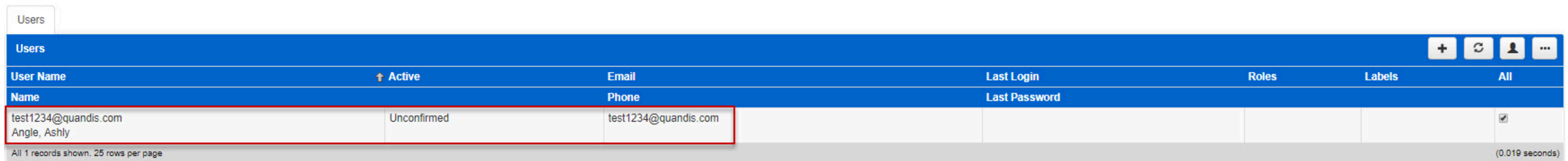
4. Enter the following fields within the Register Panel and select 'Register'

- First Name

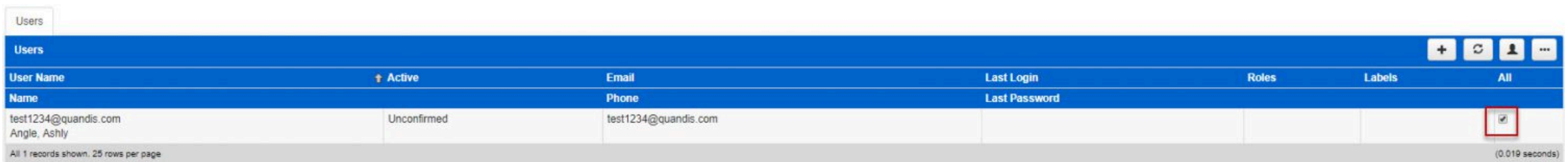
- Last Name
- Email Address
- System Roles – Role to be granted access



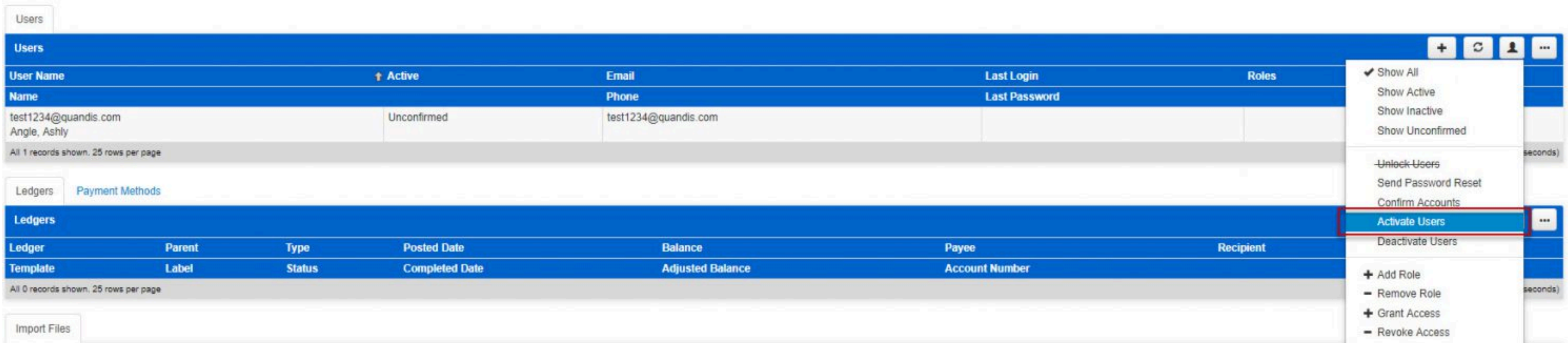
5. You are directed back to the Users panel



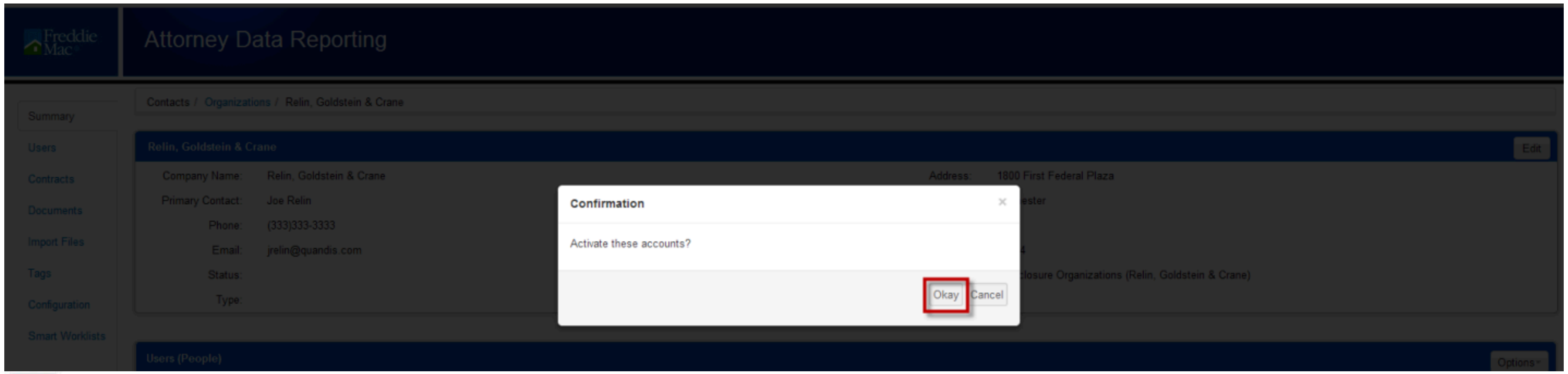
6. To activate the user, click in the user's row to highlight the row or check the box under the All column.



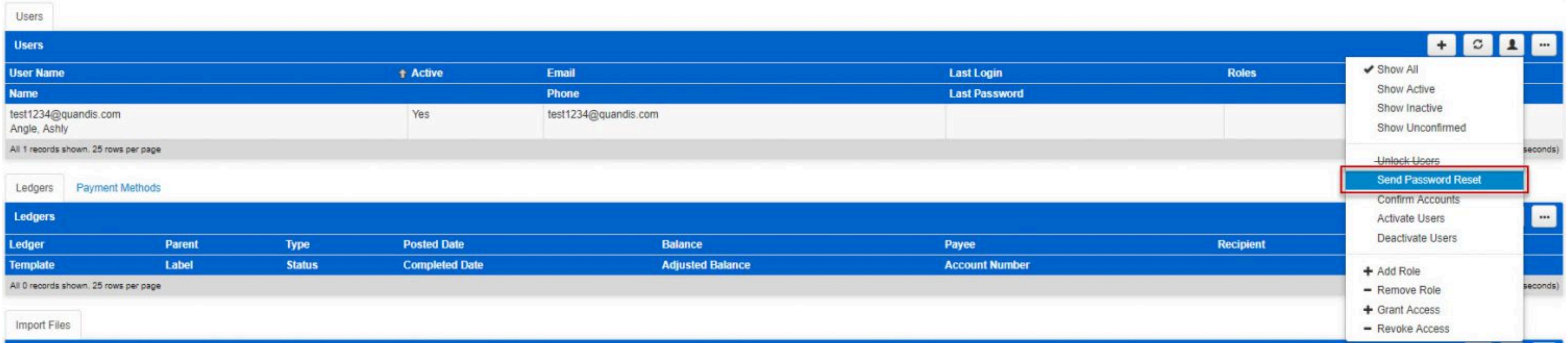
7. Select Activate Users from the Options drop-down menu.



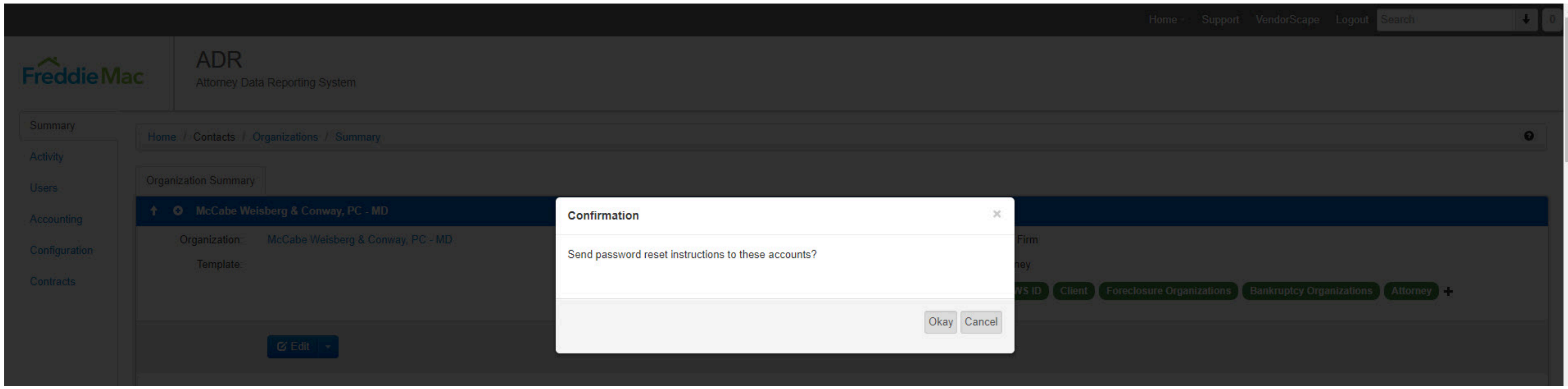
8. Click ‘Okay’ in the Confirmation dialogue box. The user is activated. All active users will have a status of “Yes” in the corresponding “Active” column



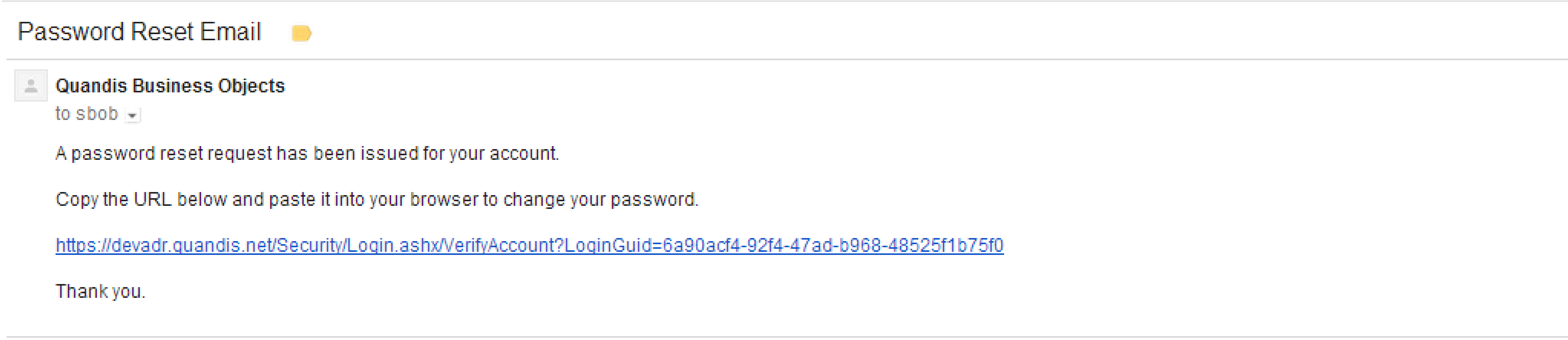
9. Send the user a password reset email by selecting Send Password Reset from the Options drop-down.



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



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.

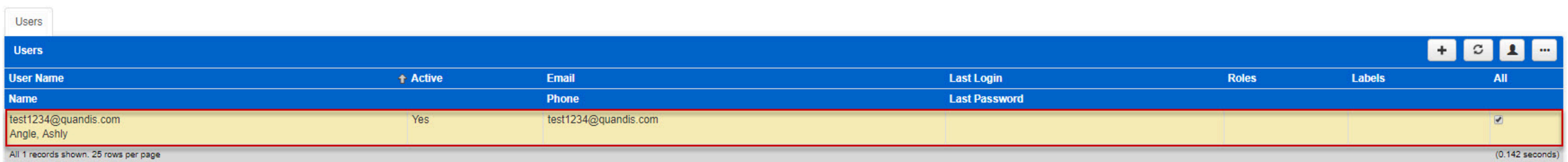
Copy the URL below and paste it into your browser to change your password.

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

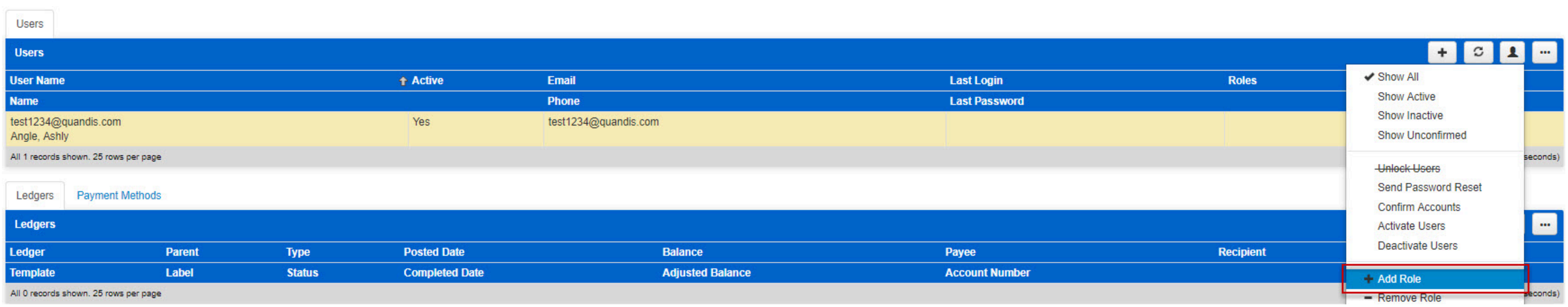
Thank you.

1.2 ADDING A ROLE TO A USER

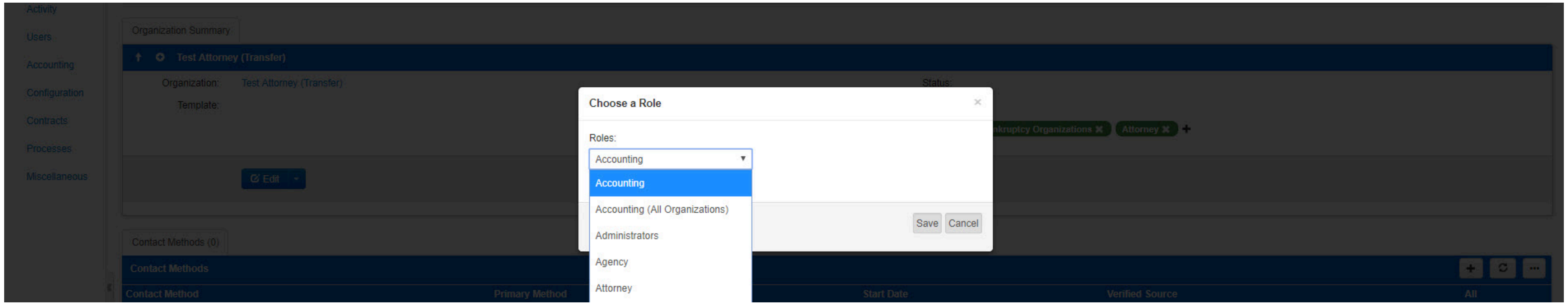
1. Search for the user that requires a role to be added.
2. Click into the row to highlight the user or check the box in the All column.



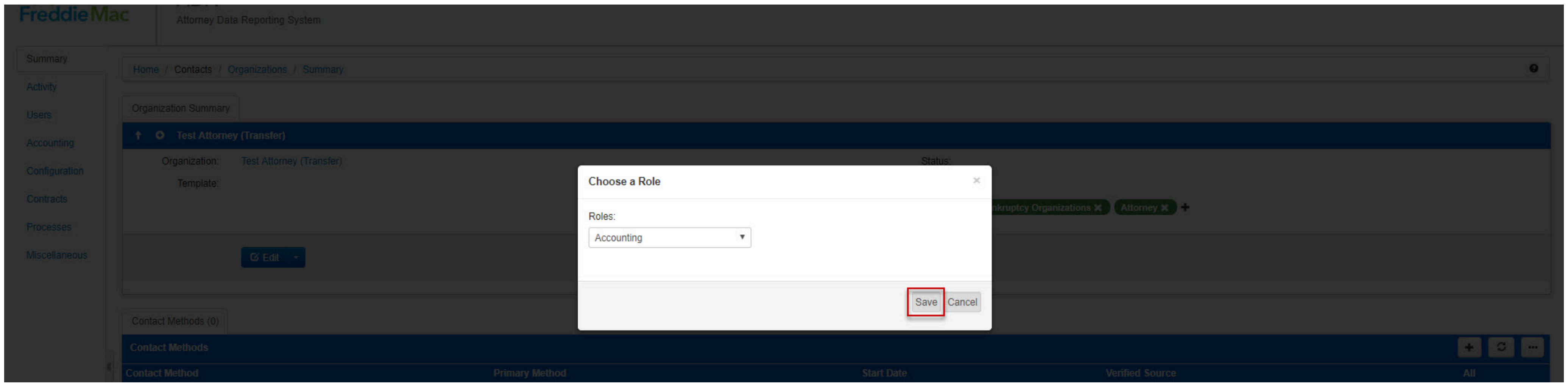
3. Select Add Role form the Options drop-down menu.



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.

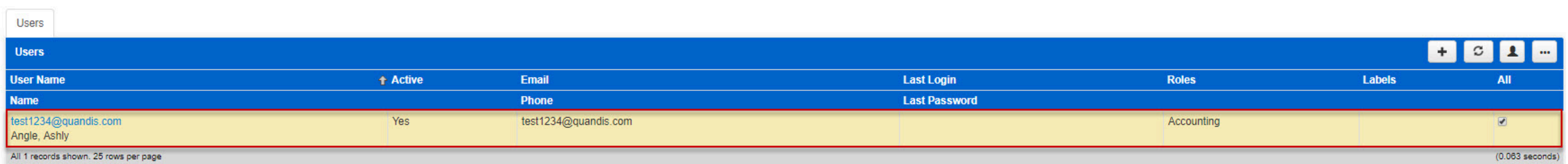
1.2.1 ROLE DEFINITIONS

	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	

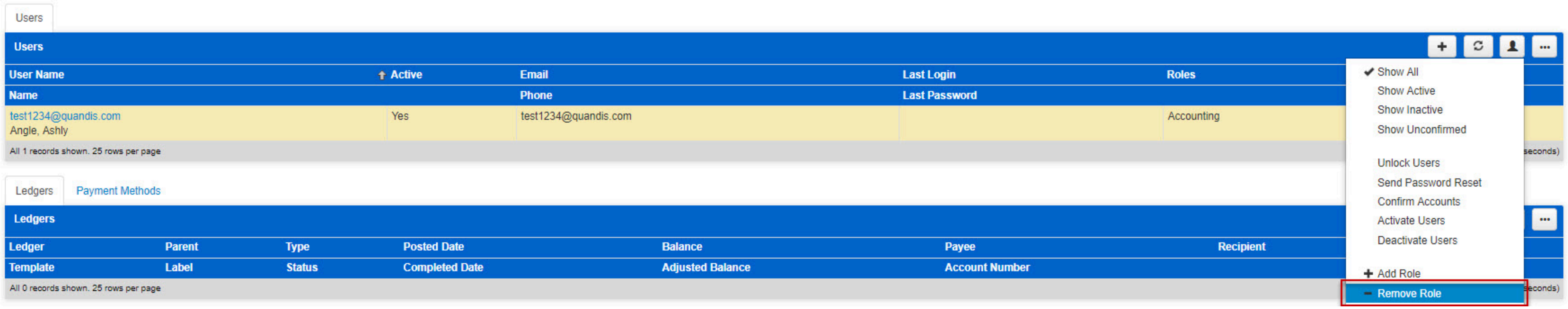
Complete Reinstatement		X		X	X	X	
Complete Pay off							
BK Summary		X		X	X	X	
Configuration Templates	X	X		X	X	X	
Create Orders		X		X	X	X	
Create Messages		X	X	X	X	X	
Upload/Delete Documents user uploaded		X	X	X	X	X	

1.3 REMOVE A ROLE

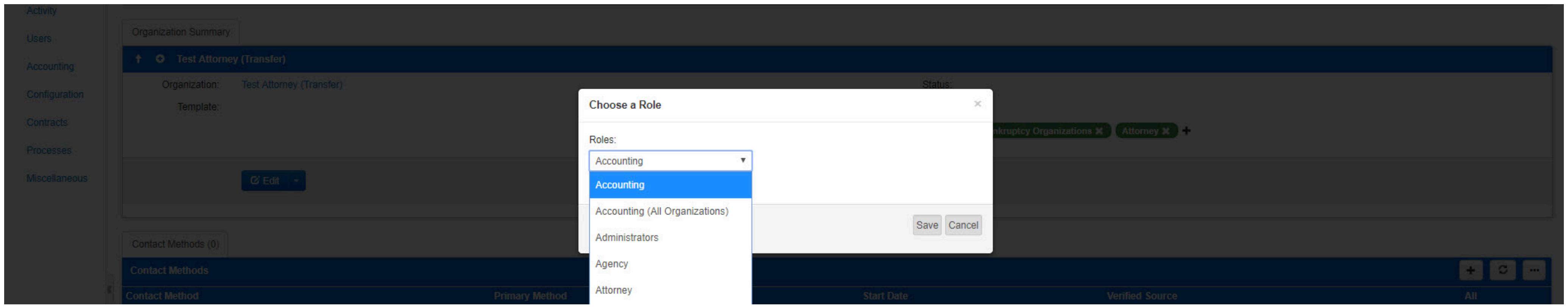
1. Search for the user that requires a role to be removed.
2. Click into the row to highlight the user or check the box in the All column.



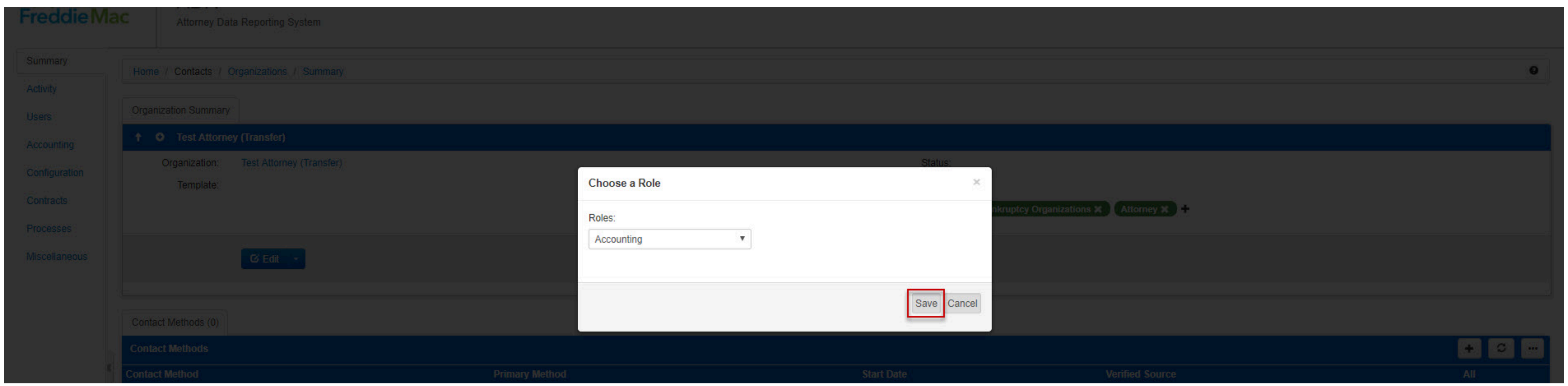
3. Select Remove Role from the Options drop-down.



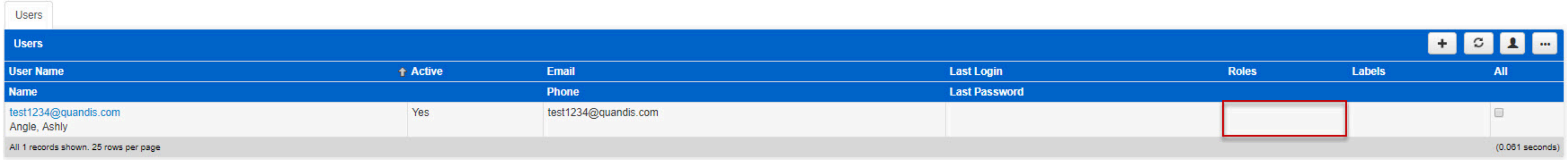
4. Select a role to be removed from the role drop-down menu. In this example, the role of Manger is going to be removed.



5. Click Save.

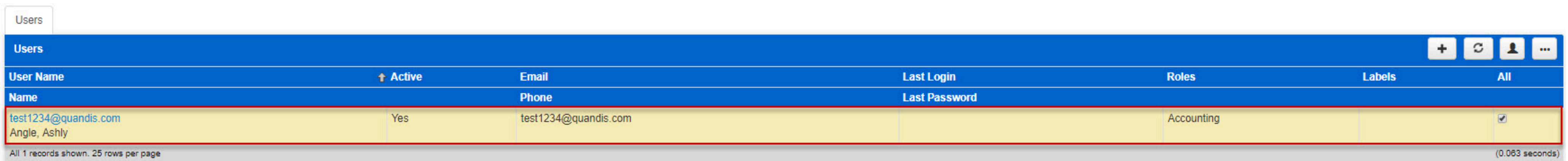


6. The role has been removed.

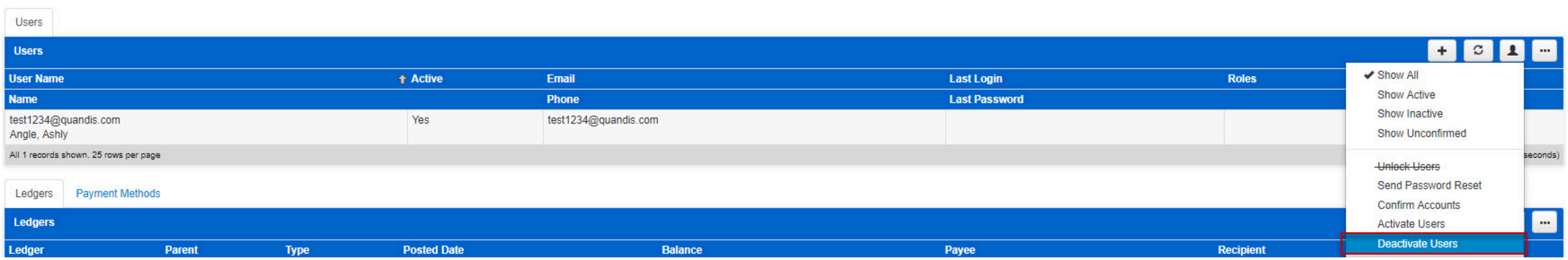


1.4 DEACTIVATE A USER

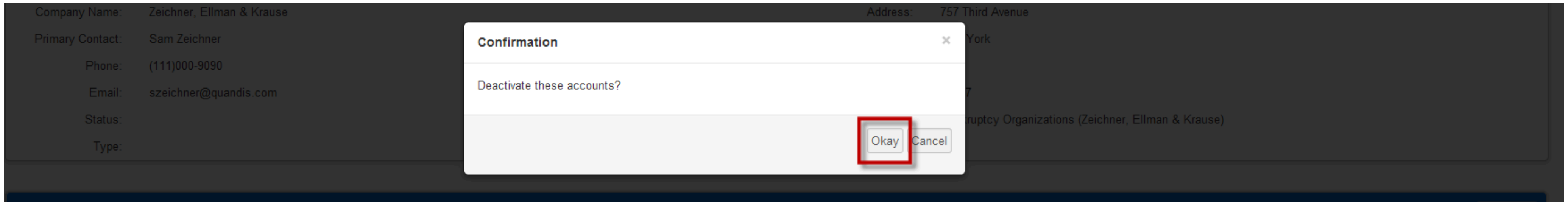
1. Search for the user that needs to be deactivated. (More than one user can be deactivated at a time)
2. Click into the row to highlight the user.



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



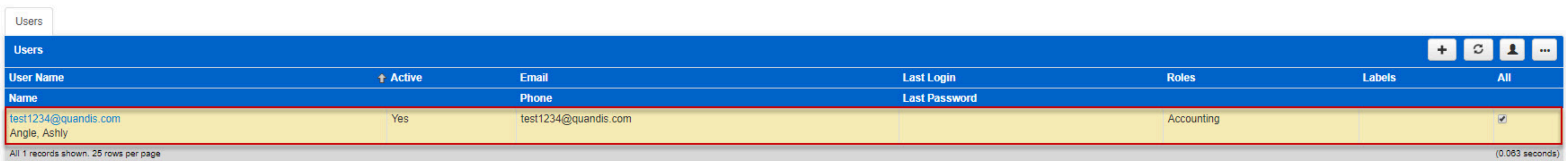
4. Click 'Okay' in the Confirmation dialogue box.



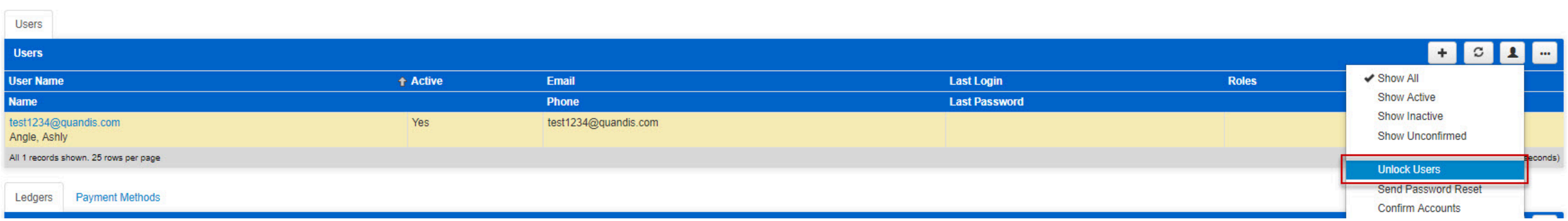
5. The Active column is No.

1.5 UNLOCK A USER

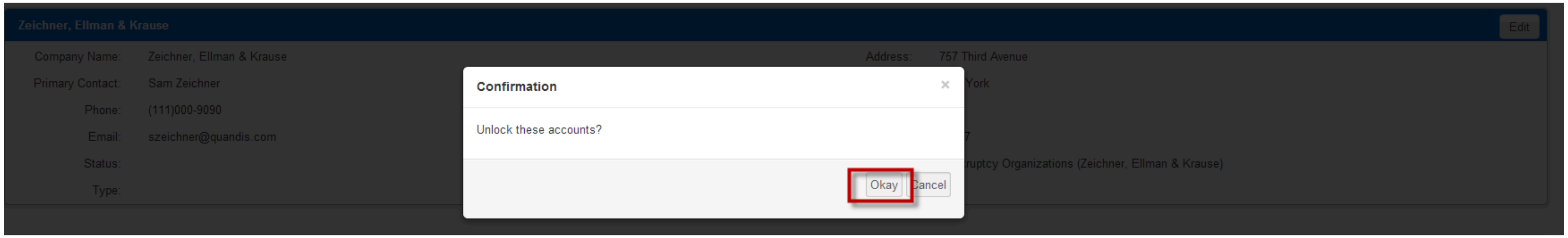
1. Search for the user that needs to be unlocked. (More than one user can be unlocked at a time)
2. Click into the row to highlight the user.



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



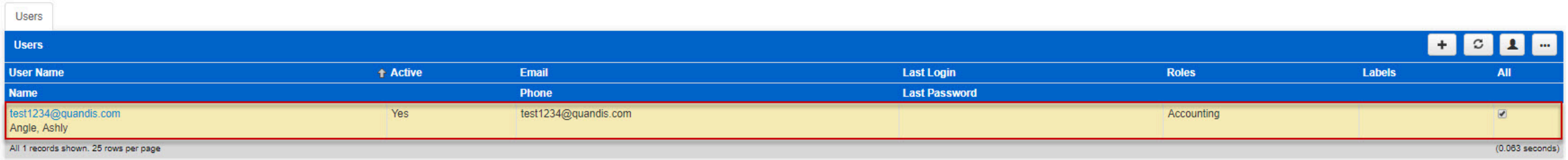
4. Click 'Okay' in the confirmation dialogue box.



5. The user has been unlocked.

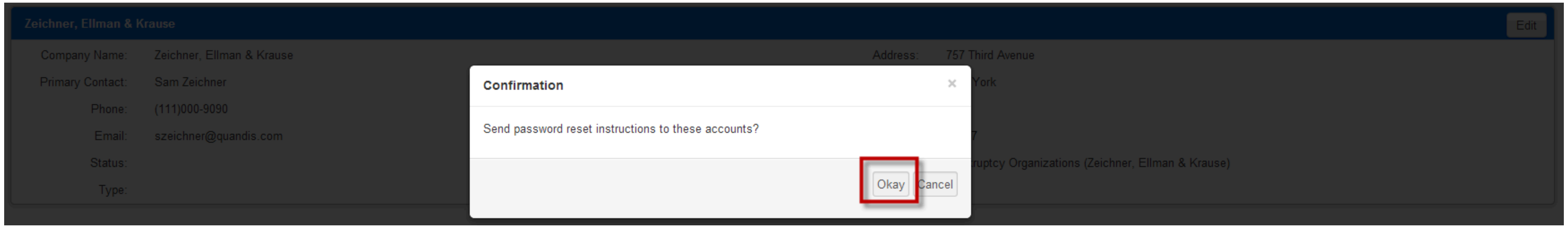
1.6 RESET A USER PASSWORD

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.

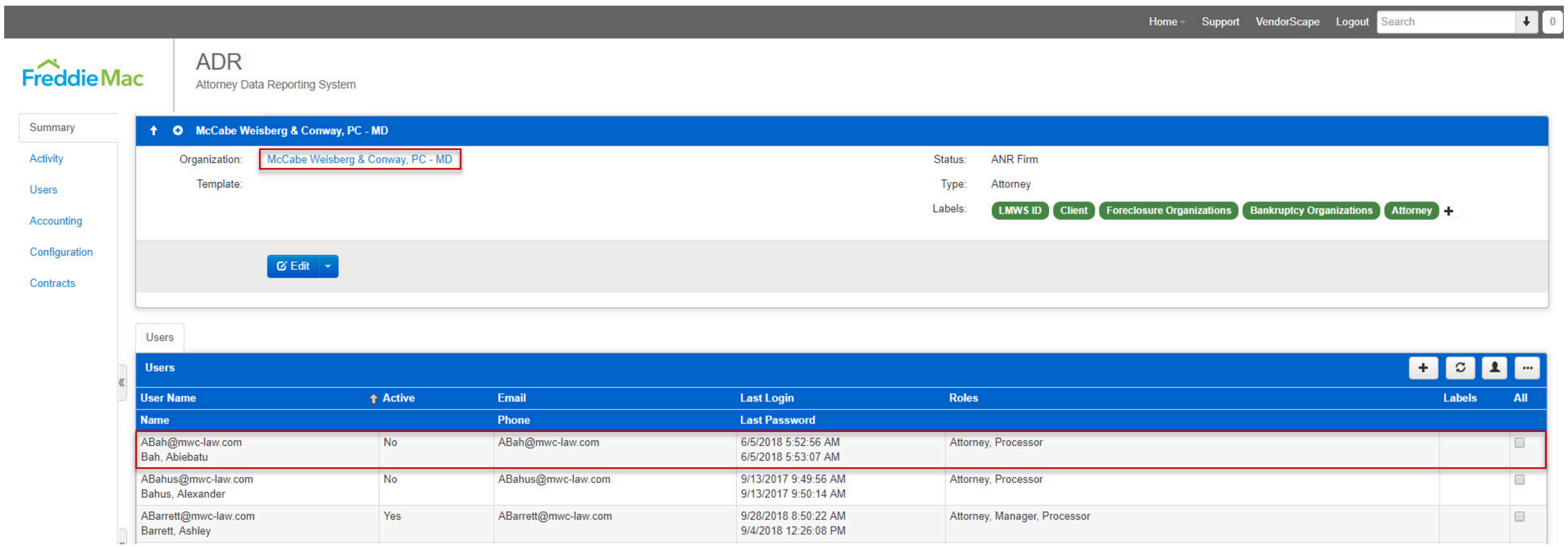
4. Click 'Okay' in the Confirmation dialogue box.



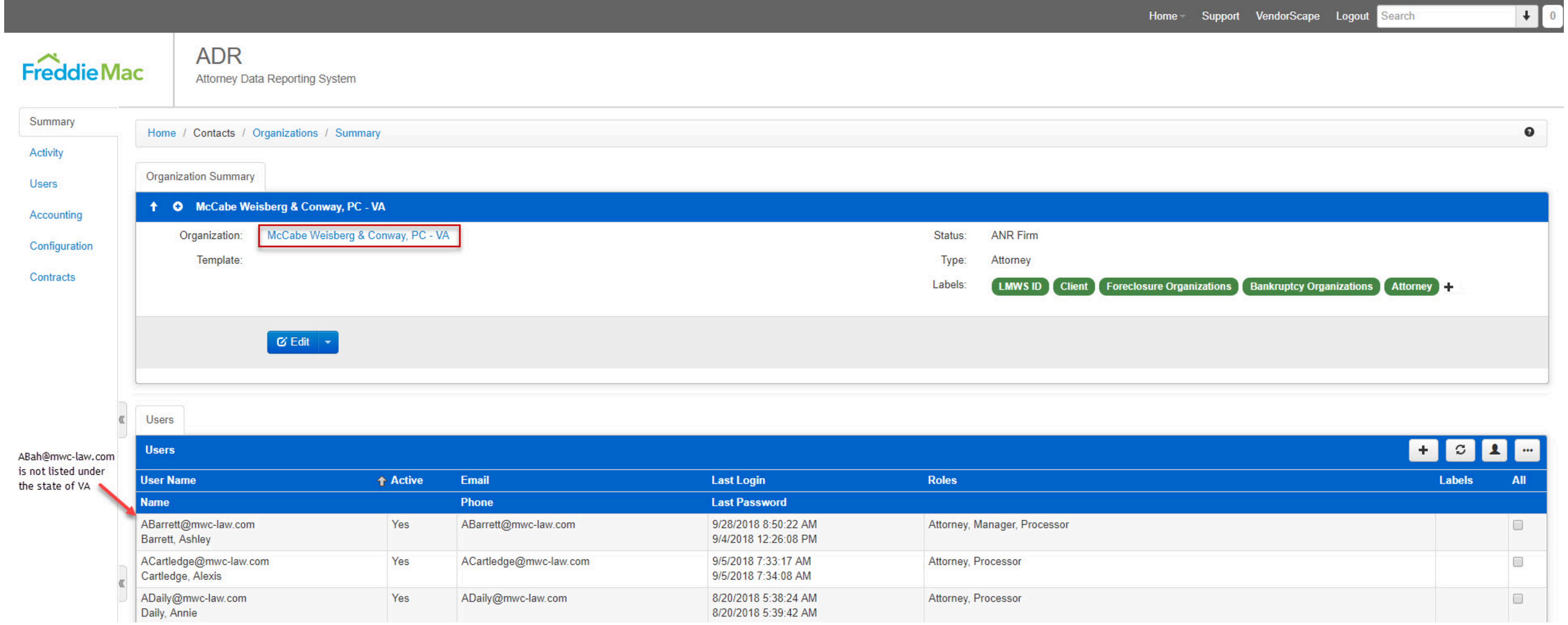
5. The user is sent an email to reset password.

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 Weisber & Conway, PC – MD. Note that the state will be appended after the organization name (e.g. – MD).

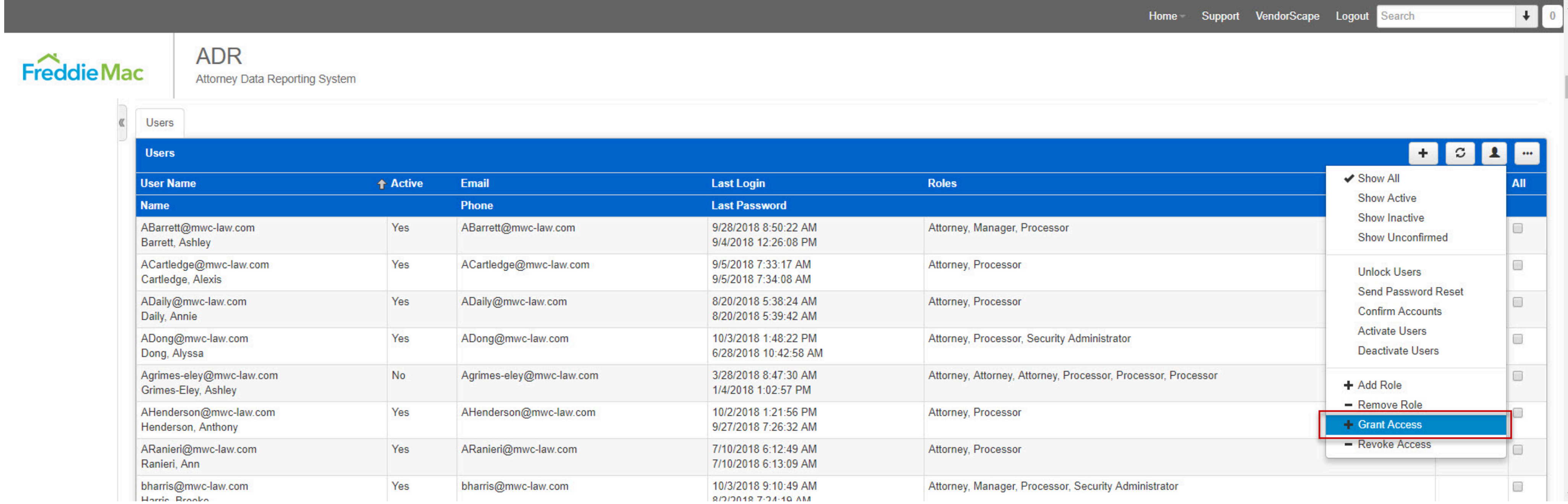


2. ABah@mwc-law.com is not a user for the McCabe Weisber & Conway, PC in MD and requires access to the MD office.



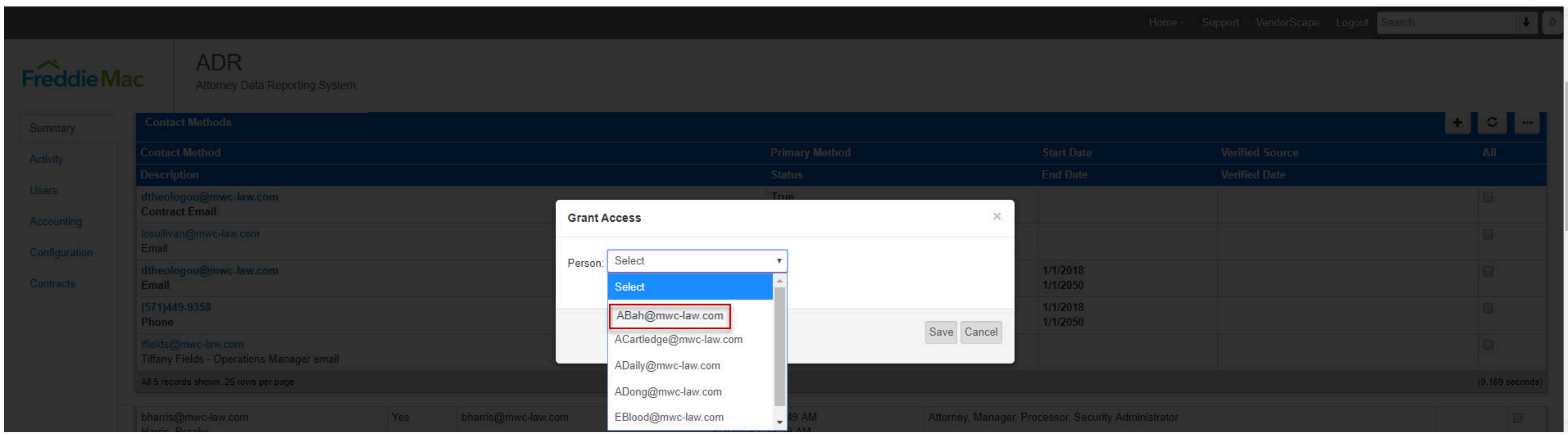
3. Navigate to the organization the user should be granted access.

- Select ‘Grant Access’ under the Person Icon



4. The Grant Access dialogue box opens.

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



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+)

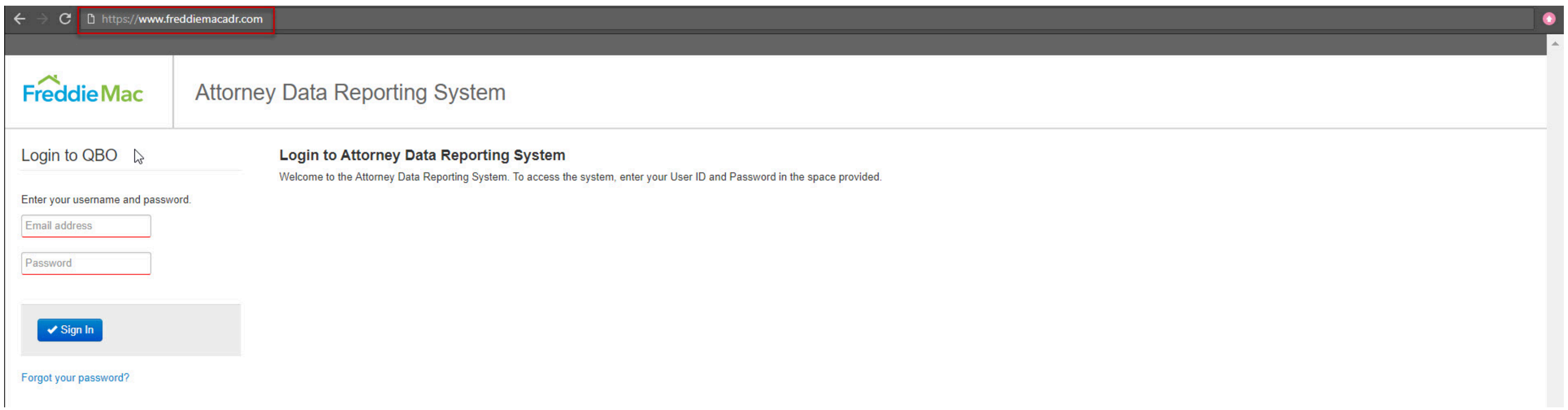
Firefox (Version 17+)

Safari (Version 5+)

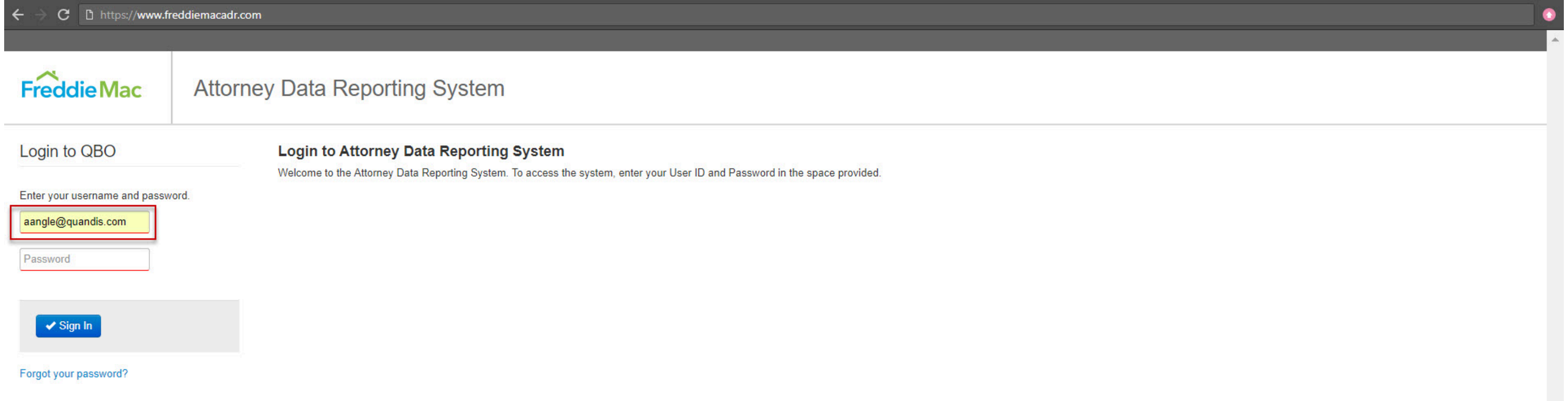
Users that are not using one of the above compatible web browsers will receive an error message and be denied access to the ADR website

2.1 LOGGING INTO THE SYSTEM

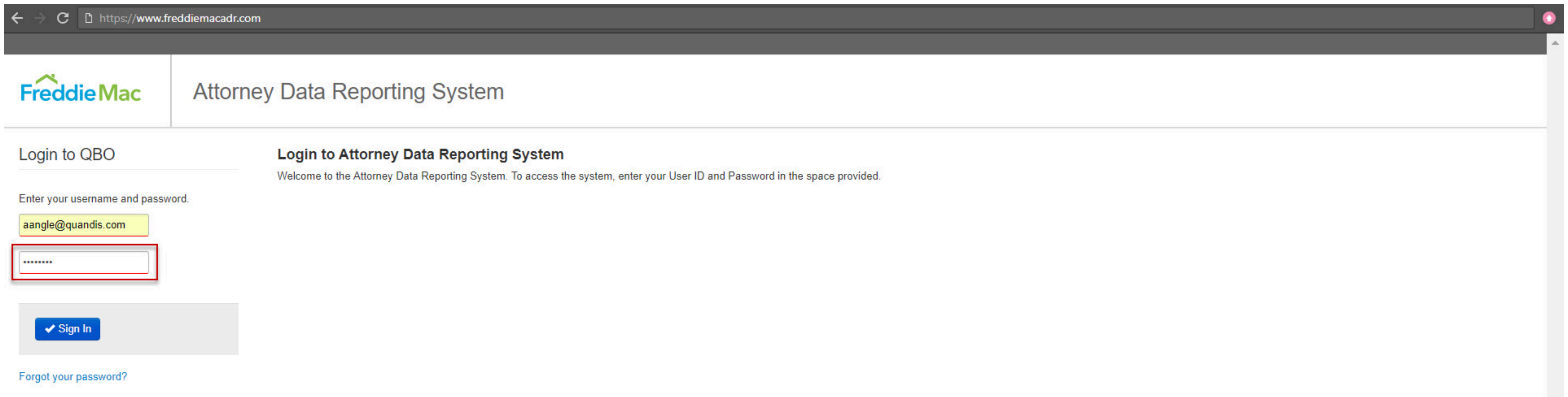
1. Enter https://freddiemacadr.co m in your address bar.



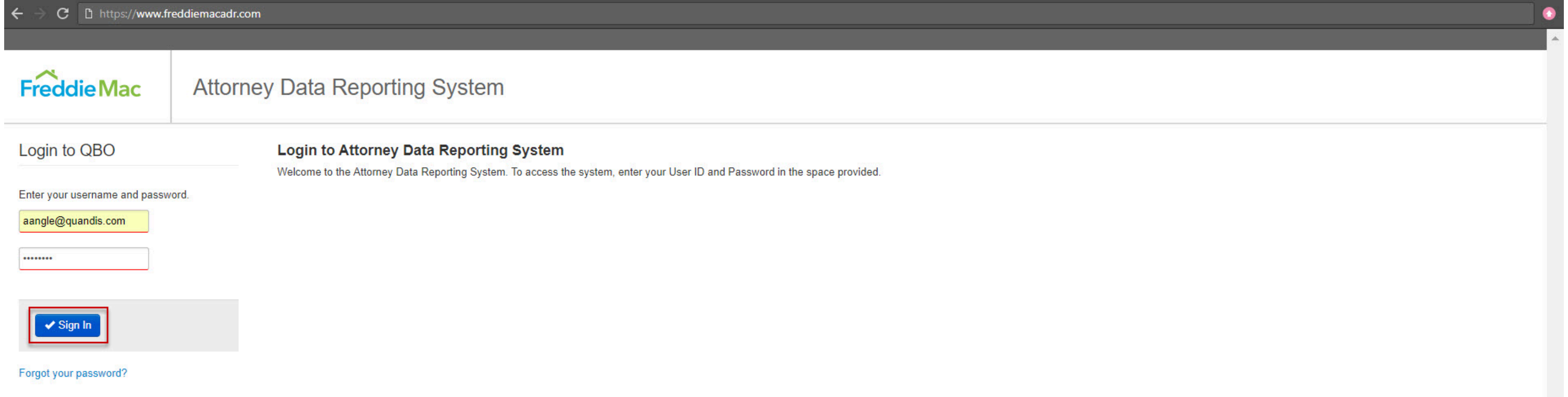
2. Enter the e-mail address, which is your user name, in the E-mail field



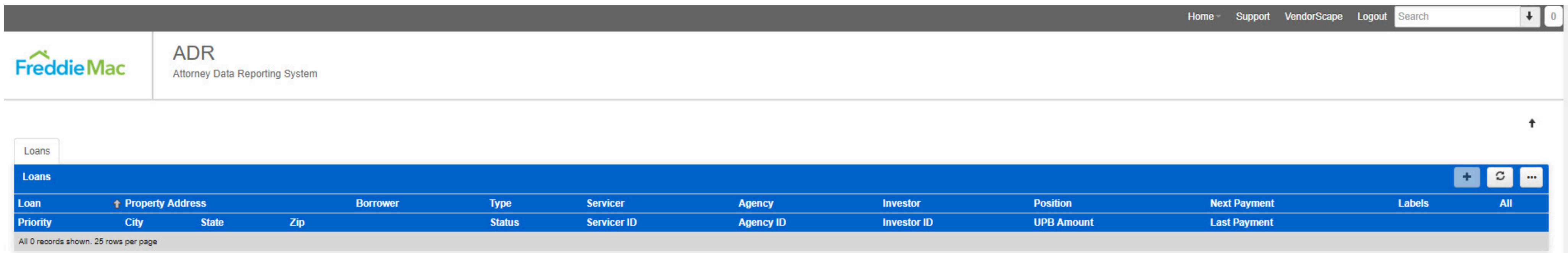
3. Enter your password in the password field.



4. Click Sign In.

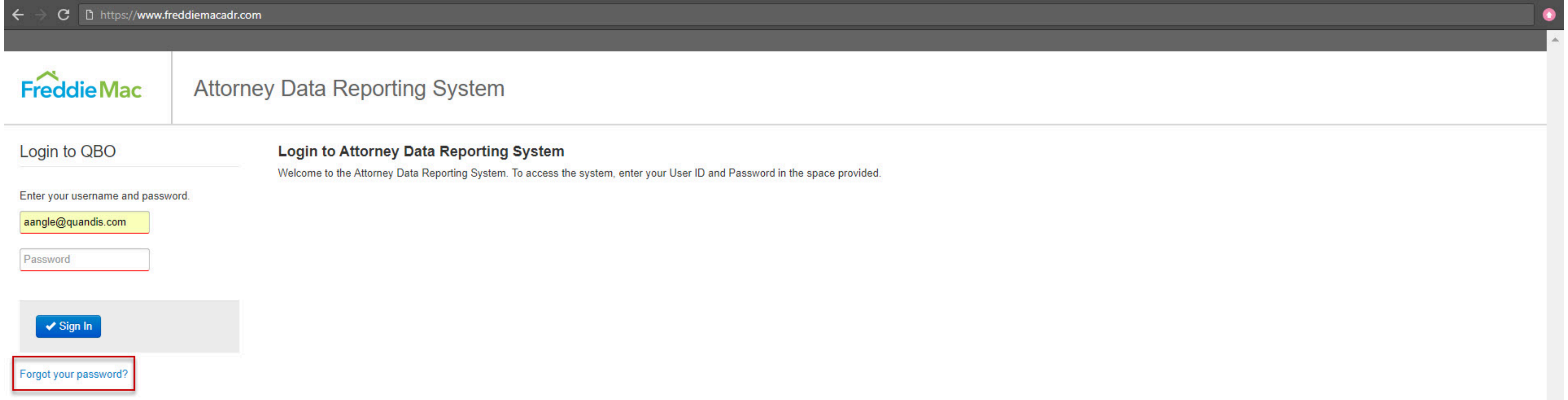


5. You are directed to the Search Page.

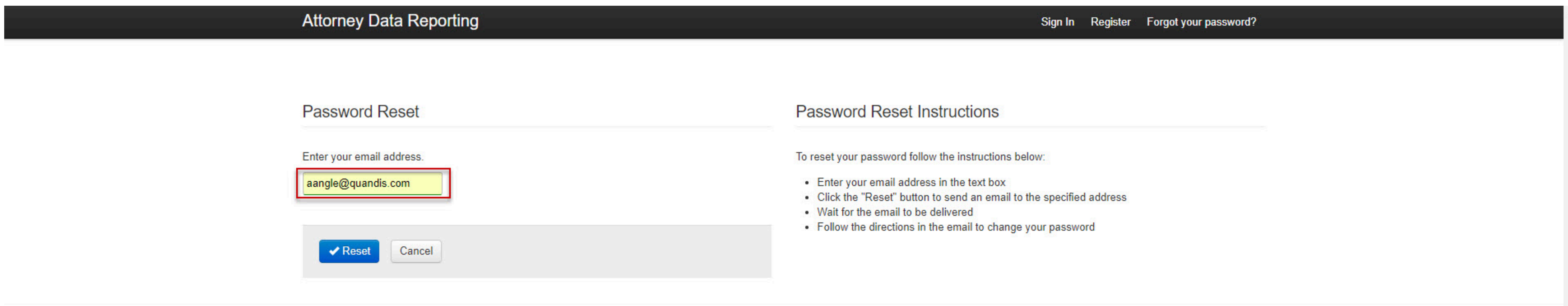


2.2 RESETTING YOUR PASSWORD

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.



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



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.

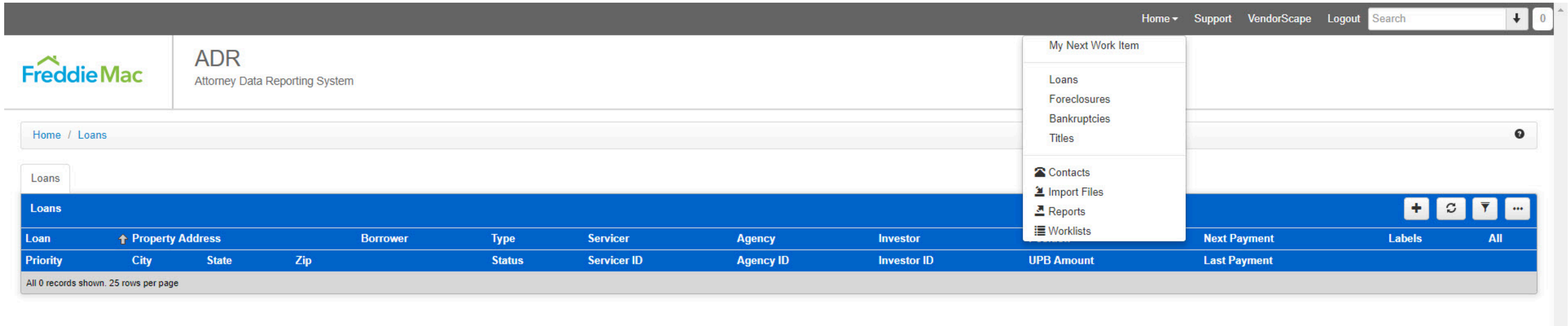
3 OPENING A FORECLOSURE

All fields underlined in red are require fields.

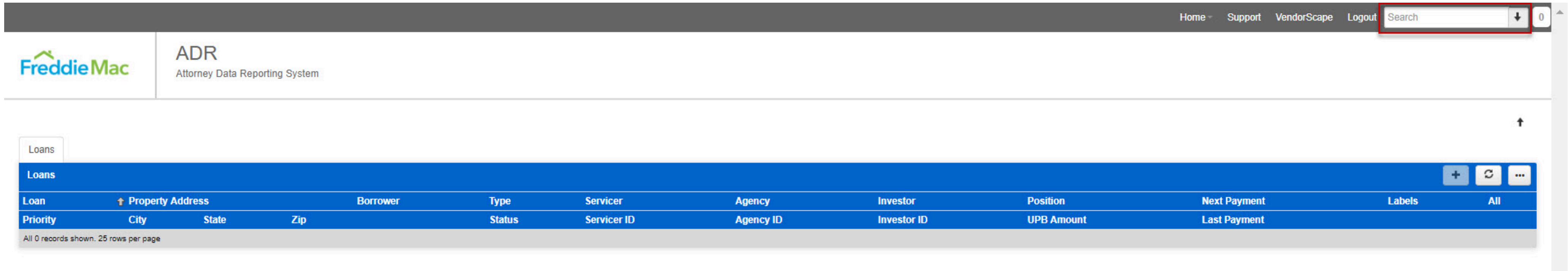
Please note:The loan information may not be populated when you try to open the Foreclosure. Freddie Mac provides limited loan information prior to cases being opened. Once the Foreclosure case has been opened, the loan and property information will populate within 24 to 48 hours.[]

3.1 OPENING A FORECLOSURE

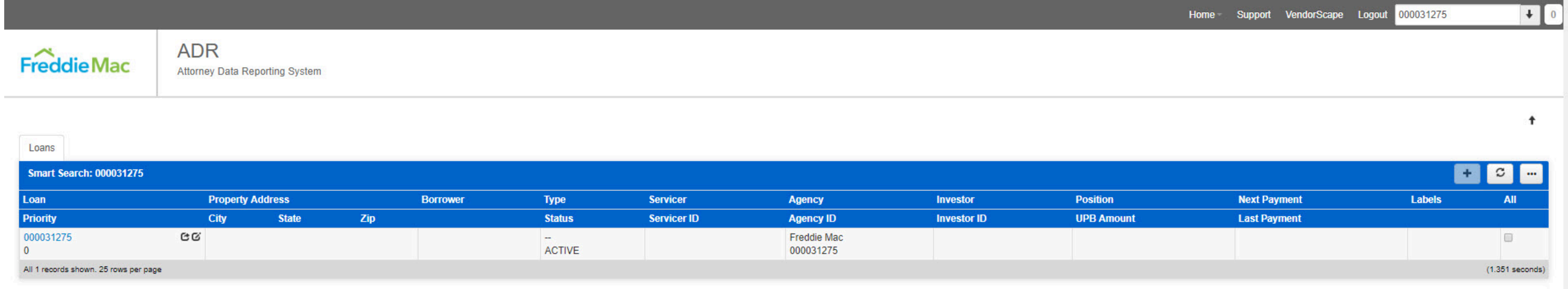
1. Select Loans from the Dashboard drop-down menu.



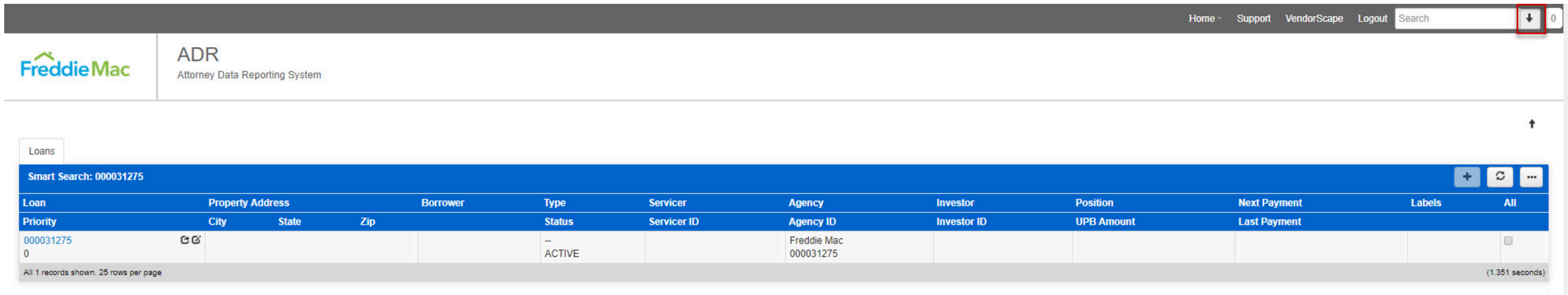
2. Search for the loan you need to activate by entering the Freddie Mac loan number in the search field and click enter. Freddie Mac loan numbers are 9 characters in length and cannot be altered by users.



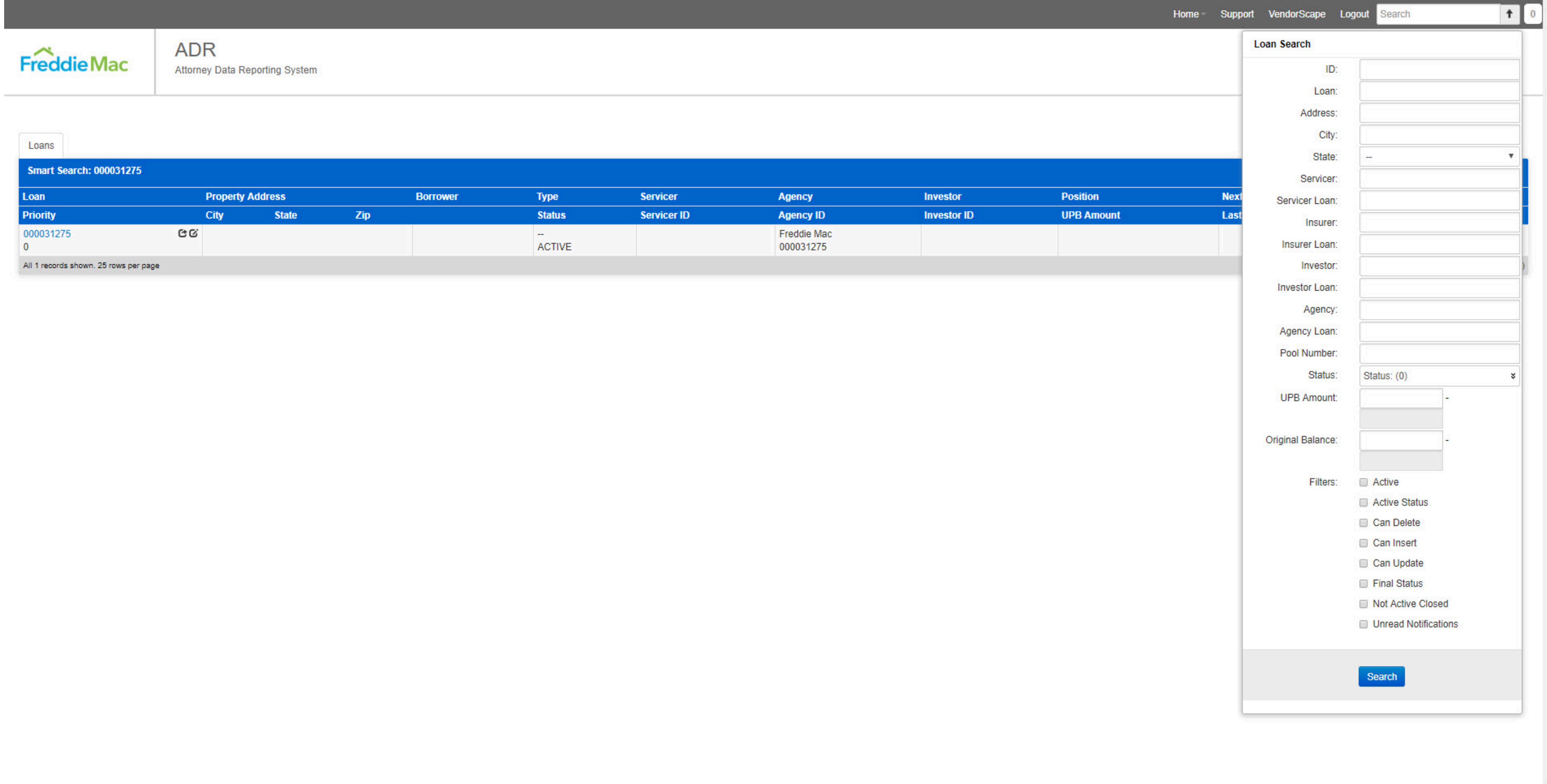
3. Your search results are presented.



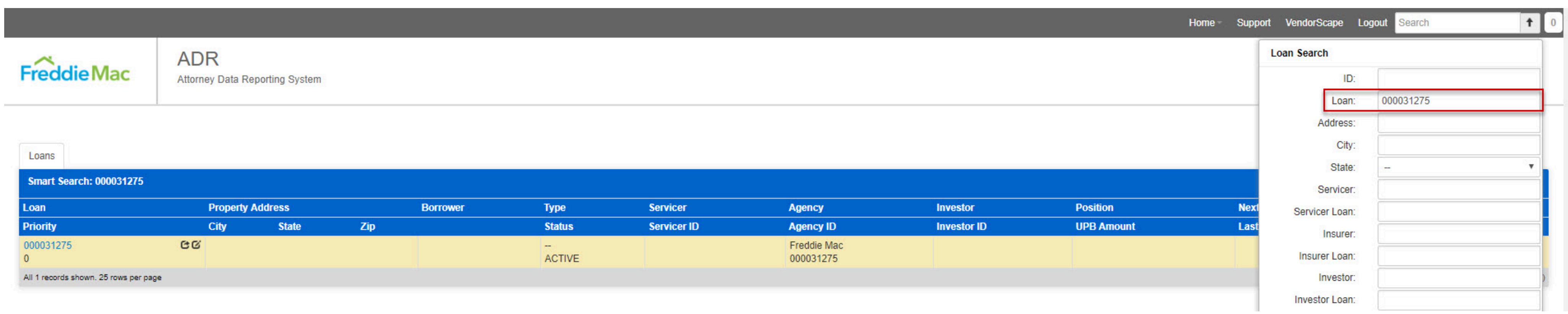
4. You can also click on the down arrow located next to the search field.



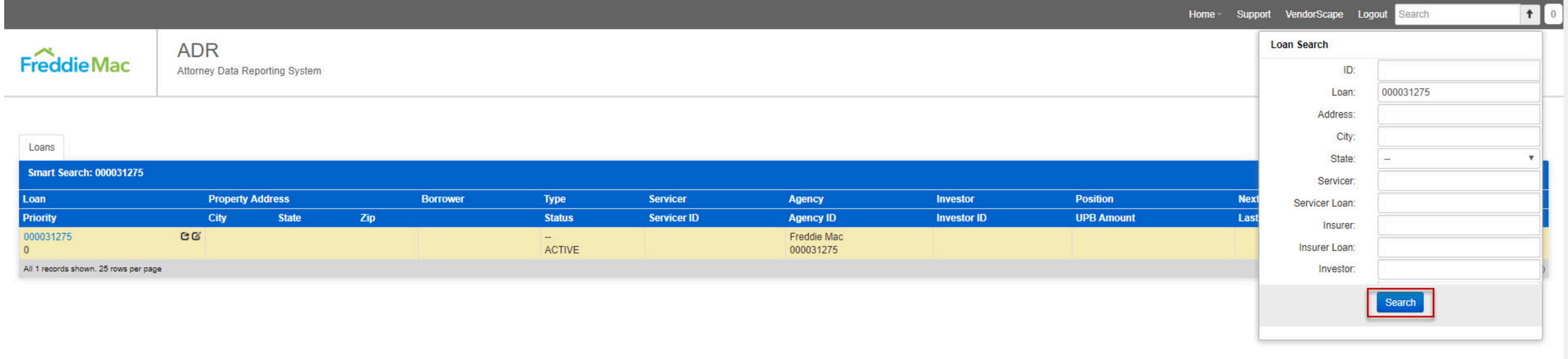
5. The loan search panel is expanded.



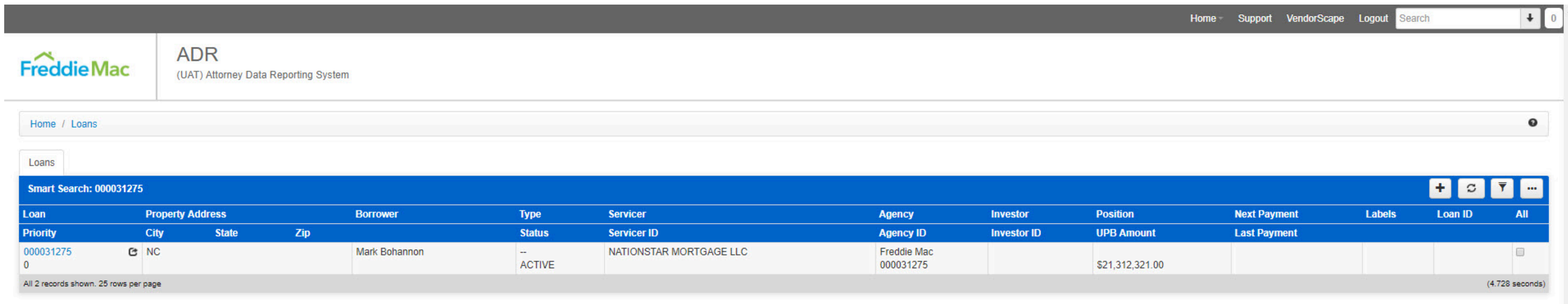
6. Enter the loan number in the loan field.



7. Click Search.

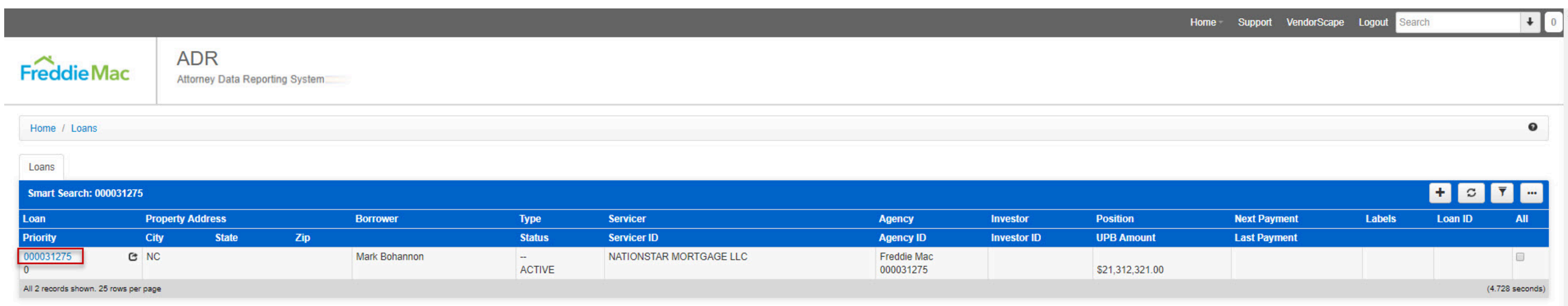


8. Your search results are presented.



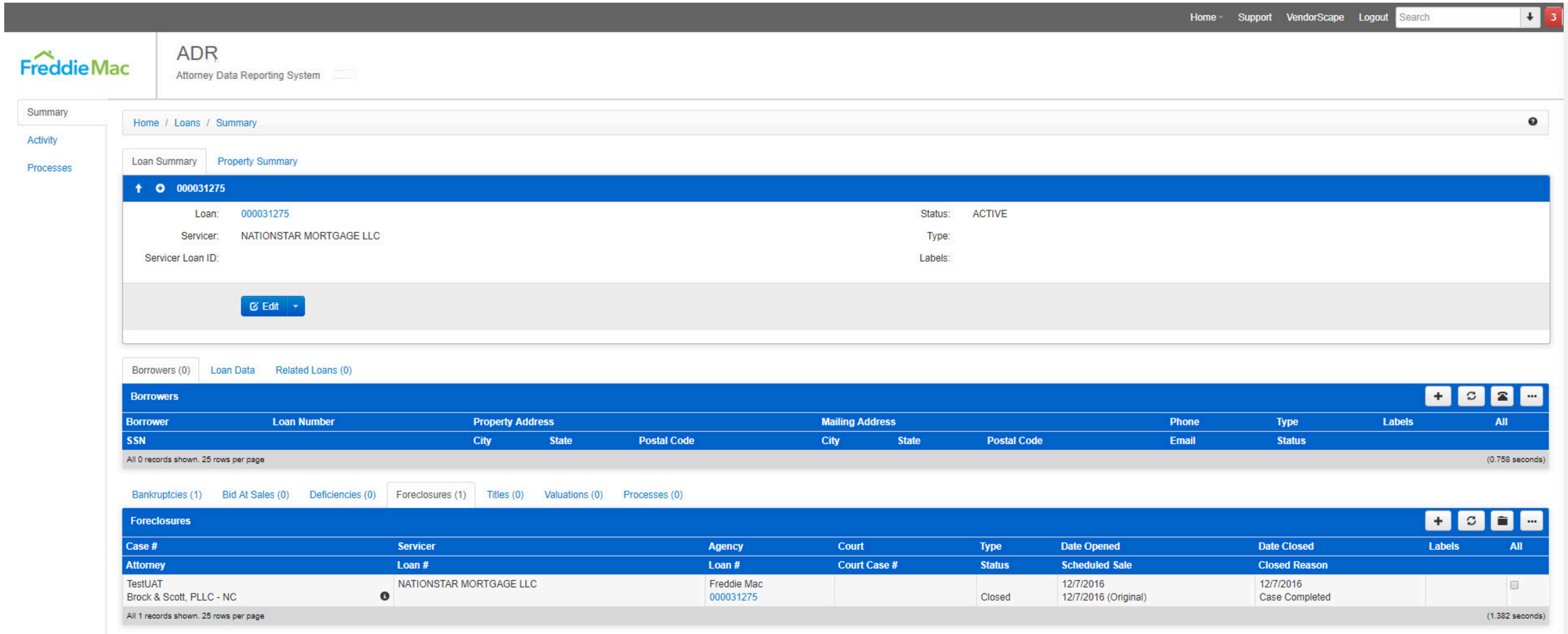
9. You will be able to view those loans that are located in your designated state and you have a contract with the servicer that is servicing the loan. If you are unsure as to your coverage area or of the servicers which you have a contract, please review the Organization section.

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



11. You are directed to Loan Summary page,

https://www.freddiemacadr.com/Mortgage/Loan.ashx/Summary?ID=XXXXX



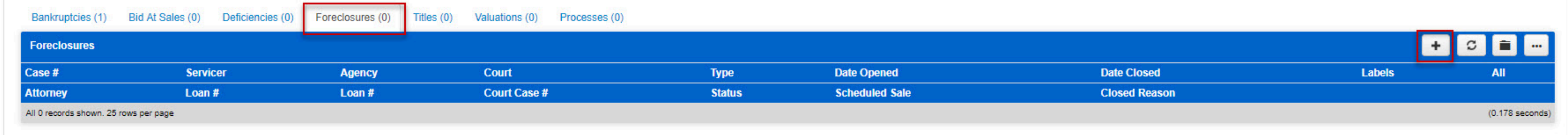
BE ADVISED: The blue bar on the Foreclosure Summary panel has an arrow and a plus sign. This pattern is used in all process summary sections

- **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.



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)

Home Support VendorScape Logout Search 2

FreddieMac

ADR
Attorney Data Reporting System

Summary
Activity
Processes

Home / Loans / Summary

Loan Summary | Property Summary

000031275

Loan: 000031275 | Status: ACTIVE
Servicer: NATIONSTAR MORTGAGE LLC | Type:
Servicer Loan ID: | 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 (0.347 seconds)

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

New Foreclosure

Foreclosure: | Status: --
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:
Defendent:
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 | Third Party: Name, Address, City

	--
	ZIP Code
	Phone
	Email

	--
	ZIP Code
	Phone
	Email

Assigned Org.:	--
Assigned Person:	--

Date Opened:	
Opened Reason:	--
Date Due:	
Priority:	
Date Closed:	
Closed Reason:	--

Servicer:	NATIONSTAR MORTGAGE LLC
Servicer Loan ID:	
Lien Priority Type:	--
Loan Type:	--
Original Balance:	
UPB Amount:	$21,312,321.00
Deed of Trust	
Filing Date:	
Recording Date:	
Property	
Address:	
City:	
State:	NC
Postal Code:	

Borrower	
First Name:	
Last Name:	
SSN:	xxx-xx-xxxx
Co-Borrower:	○ Yes
	◉ No

✔ Save ✖ Cancel

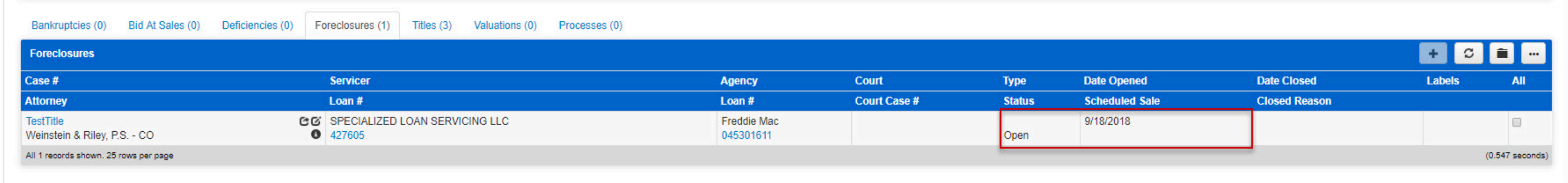
PLEASE NOTE

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).

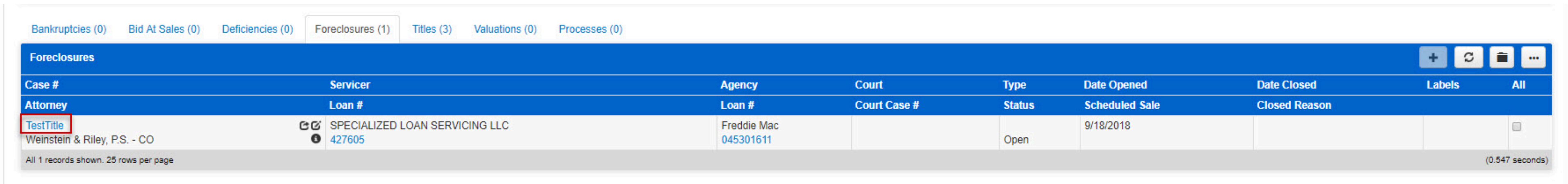
NOTE:

- 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.

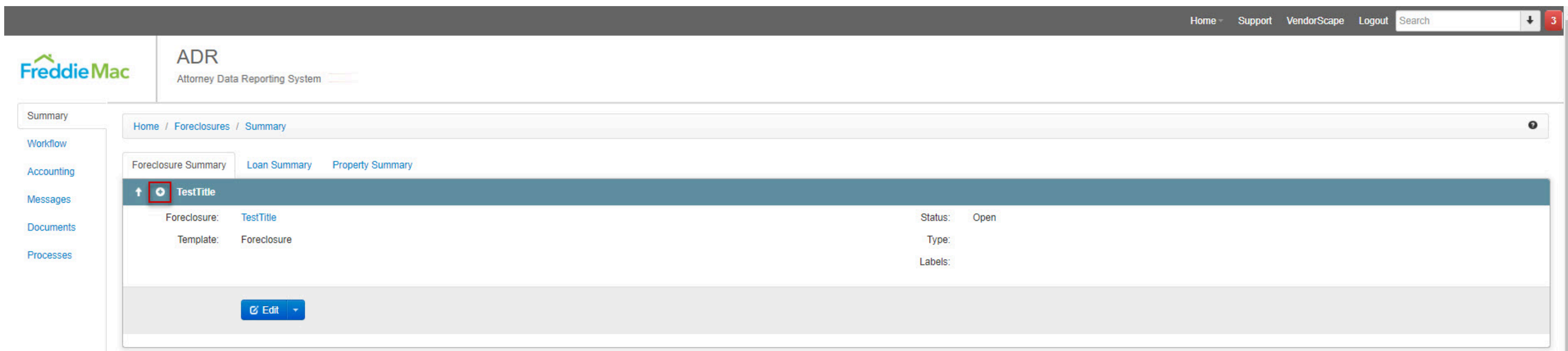


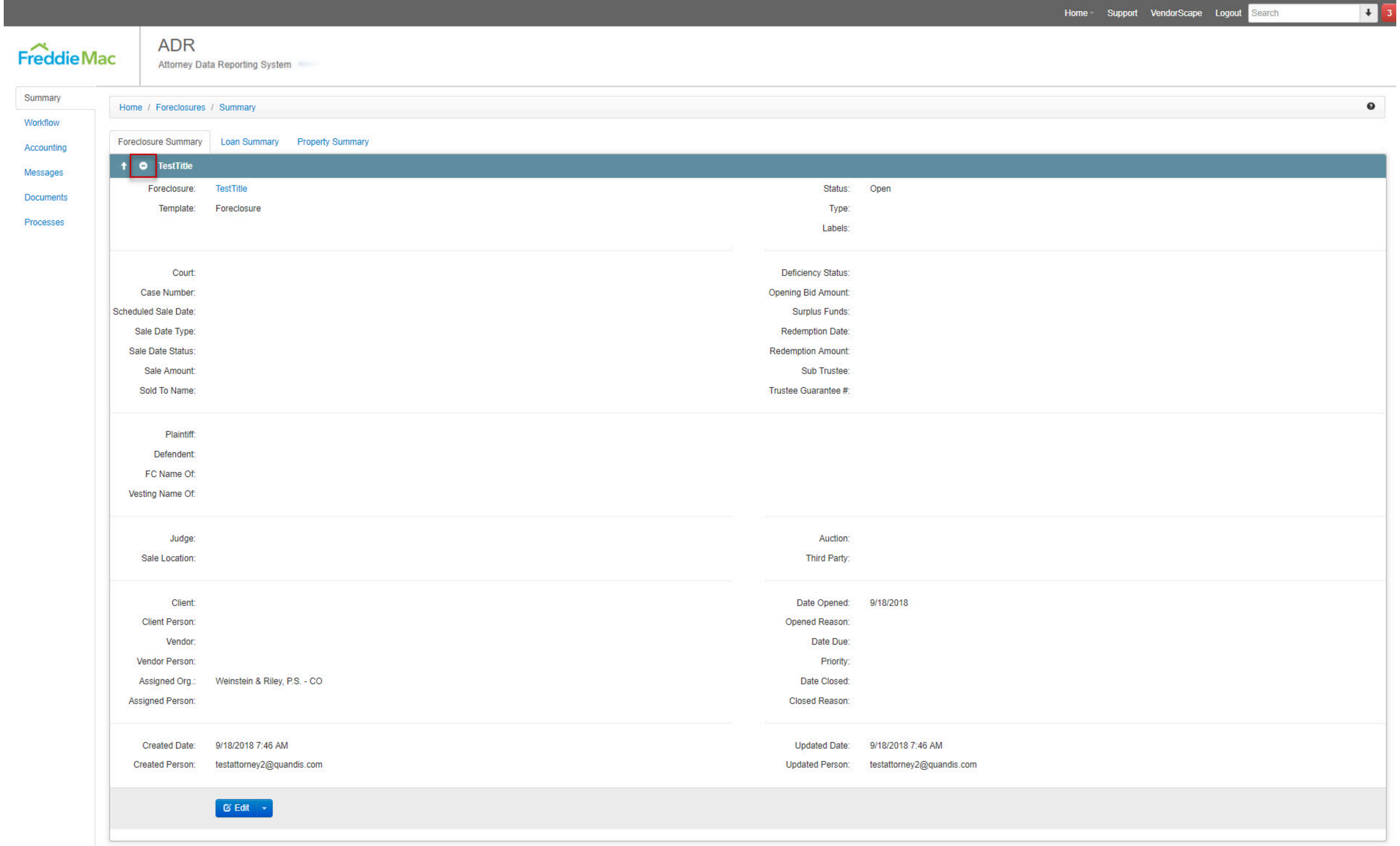
15. The number you provided in the Attorney Case Number field will be highlighted blue (as shown below). This Case Number is clickable and is the way you will access the file itself.

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.



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.

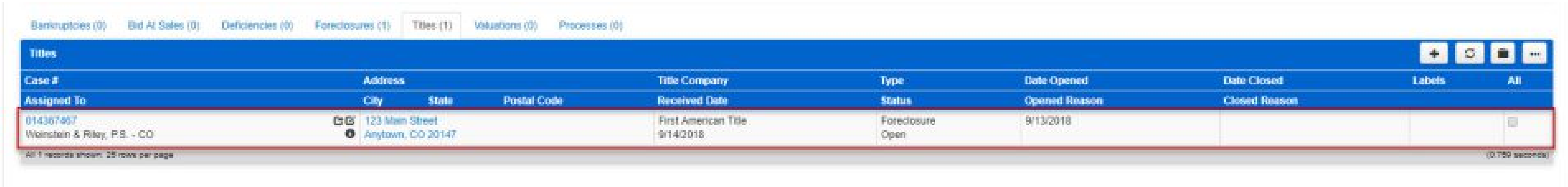




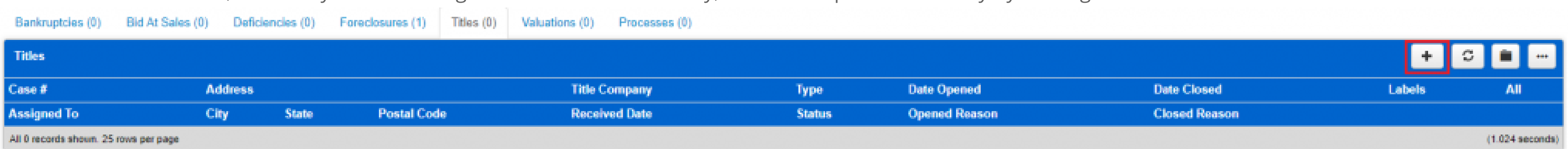
3.2 FORECLOSURE TITLE ORDER

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.

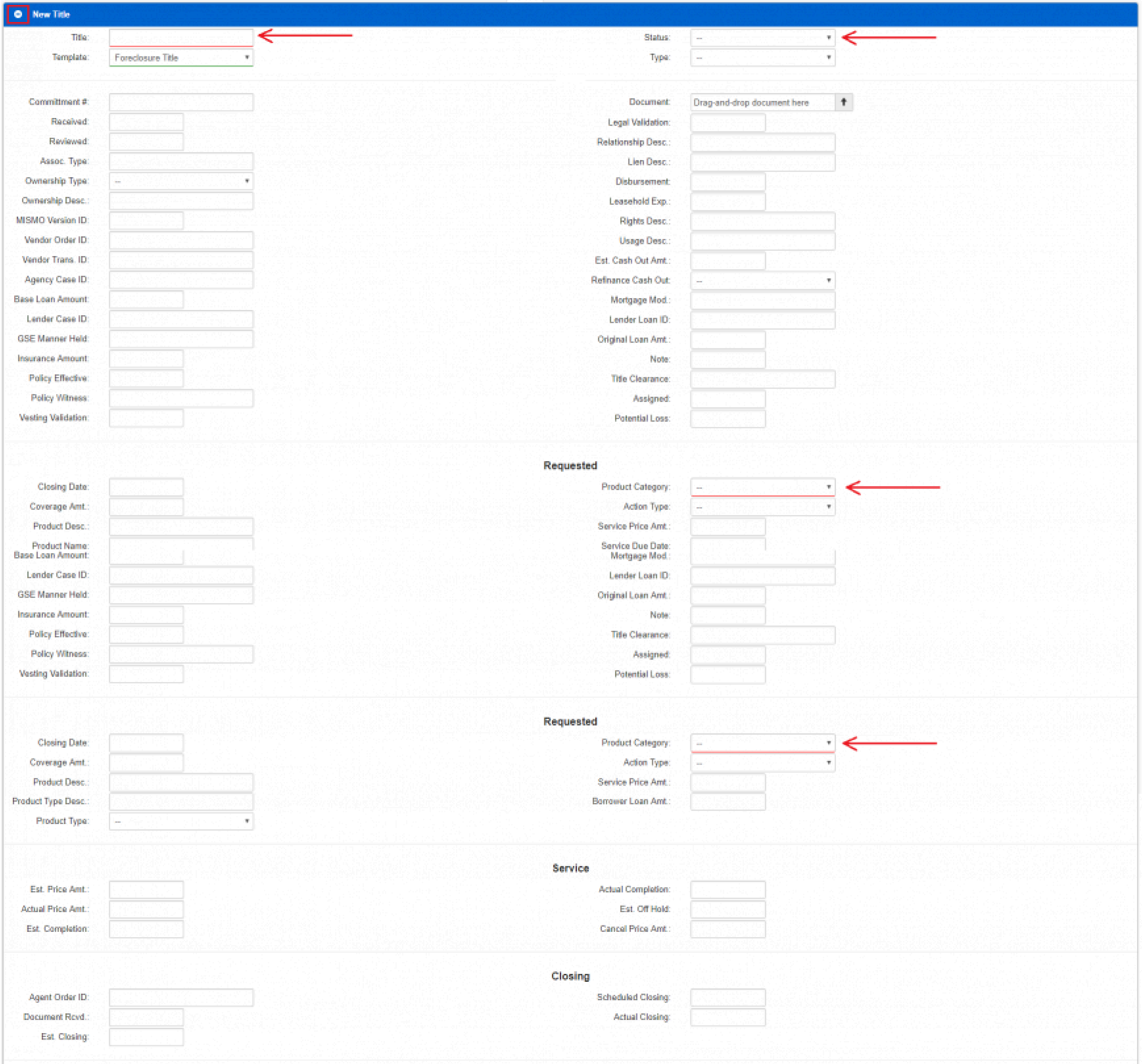
- The Foreclosure Title will render within the Title Tab. Within the record row the user can perform the following functions:
    - Case # Hyperlink – Select 'Case #' hyperlink to navigate to the specific Foreclosure Title Summary
      Note: Title Summary information will be covered in greater detail 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

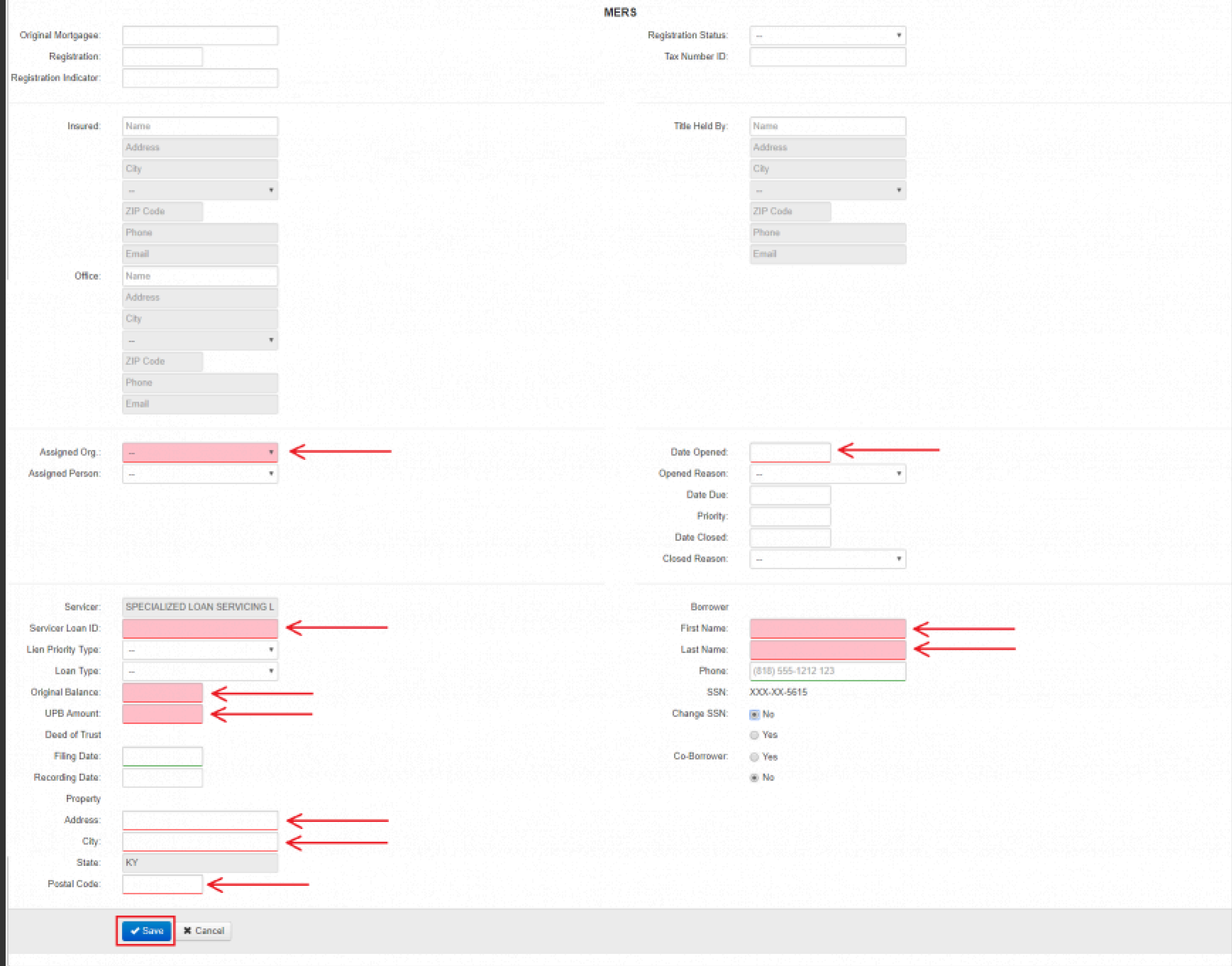


- If a Title Order is needed, but the system did not generate one automatically, one can be placed manually by clicking the "+" icon in the Titles tab:



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

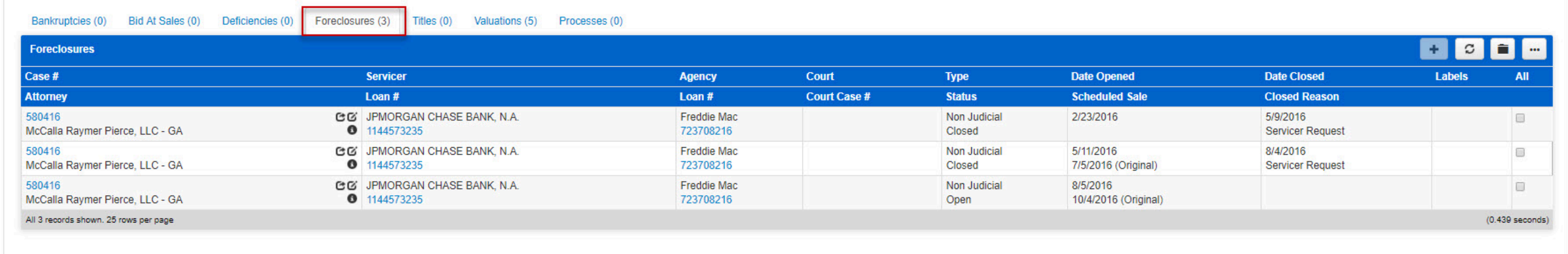

MERS
Original Mortgagee:
Registration:
Registration Indicator:
Registration Status:
Tax Number ID:
Insured:
Name
Address
City
ZIP Code
Phone
Email
Office:
Name
Address
City
ZIP Code
Phone
Email
Title Held By:
Name
Address
City
ZIP Code
Phone
Email
Assigned Org.:
Assigned Person:
Date Opened:
Opened Reason:
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
Save
Cancel

- 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.

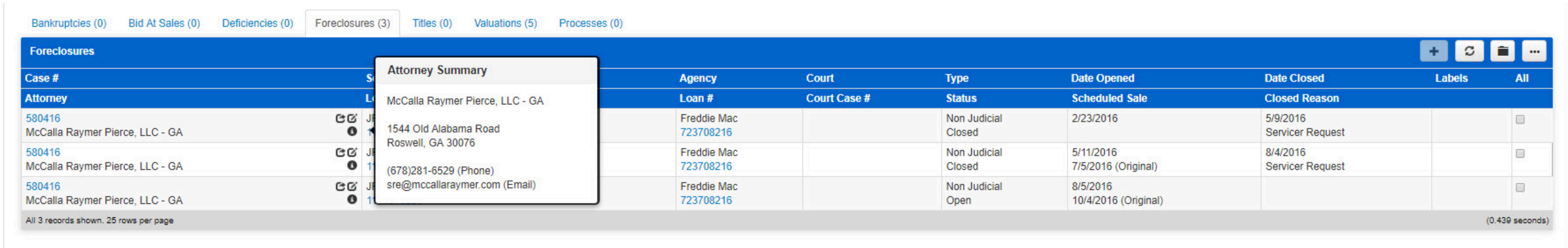
3.3 LOAN HAS ACTIVE FORECLOSURE

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.



2. Click on information icon to view the attorney information.



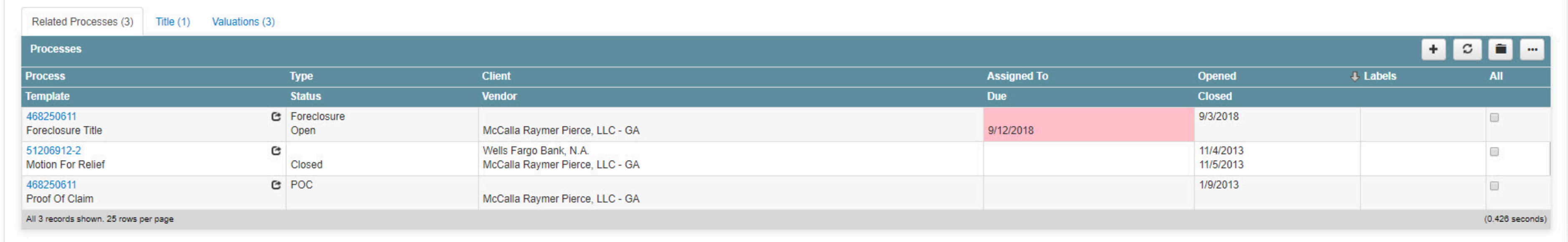
3. Contact the Law Firm and request they close their action. The status field on the Foreclosure Summary panel must be updated to Closed. If the Law Firm does not respond to your request to close the Foreclosure, contact Freddie Mac. []

3.4 RELATED PROCESSES

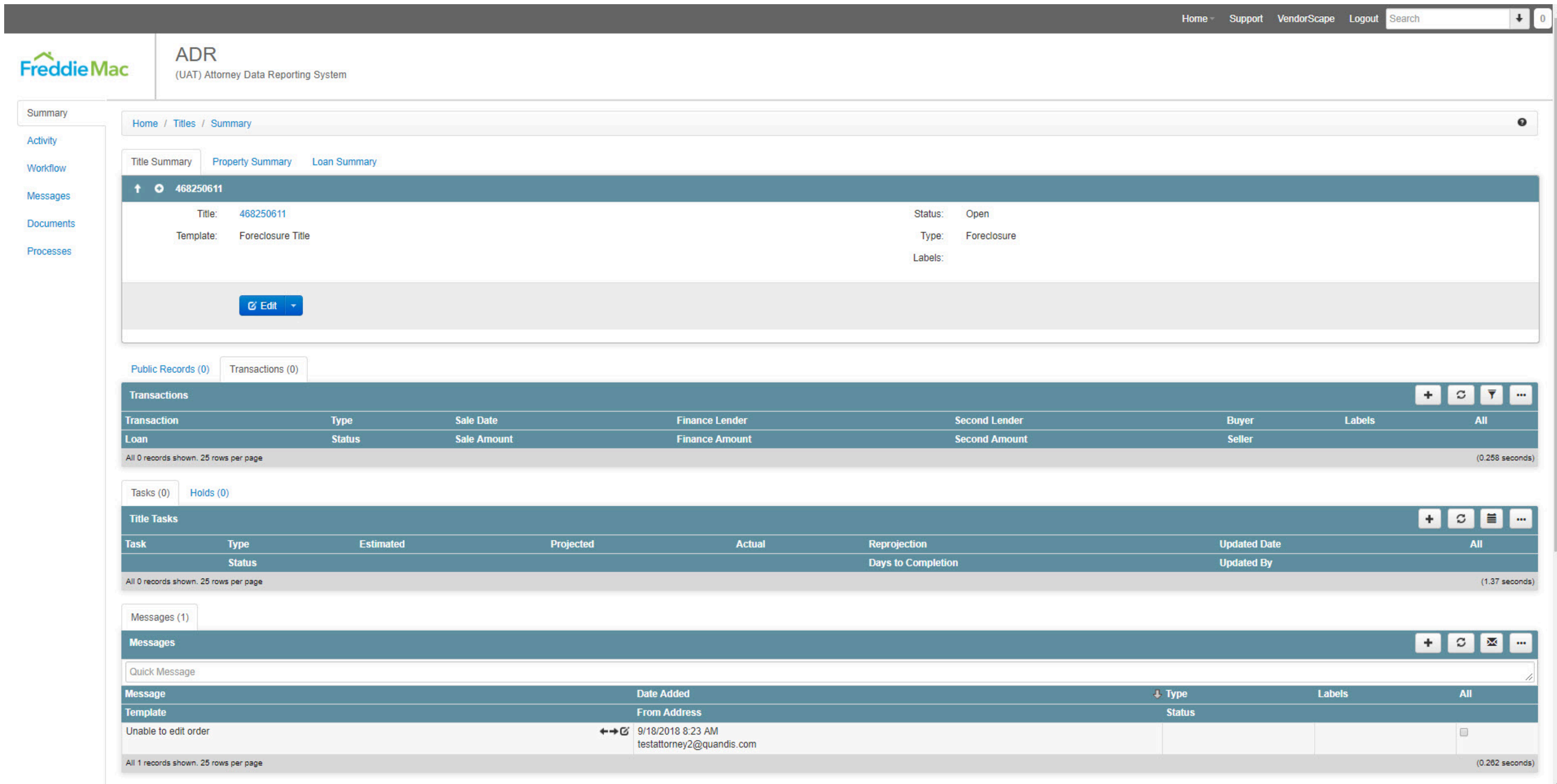
1. The Related Processes tab lists all actions related to the loan including Foreclosures, Bankruptcies, and Repurchase information.

2. On the Foreclosure Summary page navigate to the Related Processes tab

- Template column: Identifies template process (e.g. Foreclosure, Bankruptcy, Motion for Relief, Proof of Claim, Foreclosure Title, etc.)
- Status column: Identifies whether the process is ‘Open’ or ‘Closed’
- Type column: Identifies if a Foreclosure was Judicial or Non-Judicial and if the Bankruptcy that was opened was a Motion for Relief or a Proof of Claim.
- Opened column: Date the process was opened
- Closed column: Date the process was closed



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

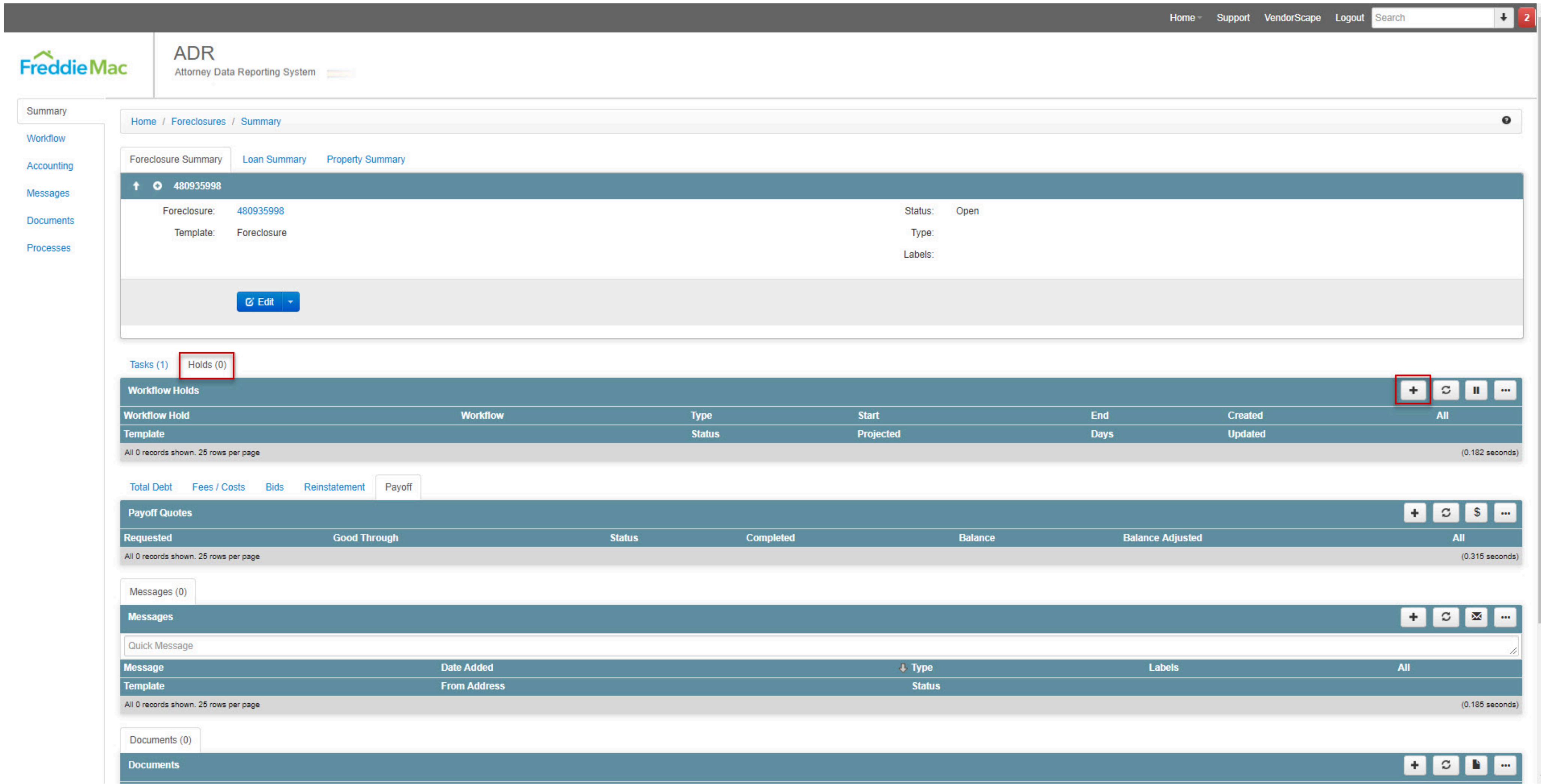


4. PLEASE NOTE: The value in the Process column for Repurchases is the Freddie Mac Loan Number.

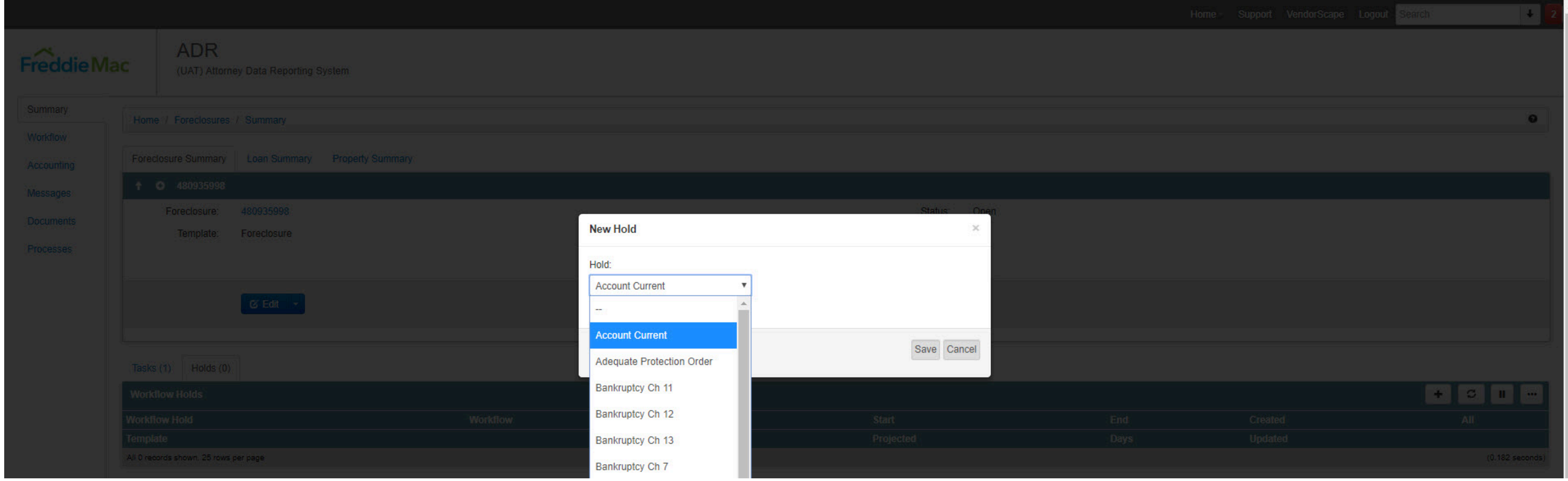
4. HOLDS

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.

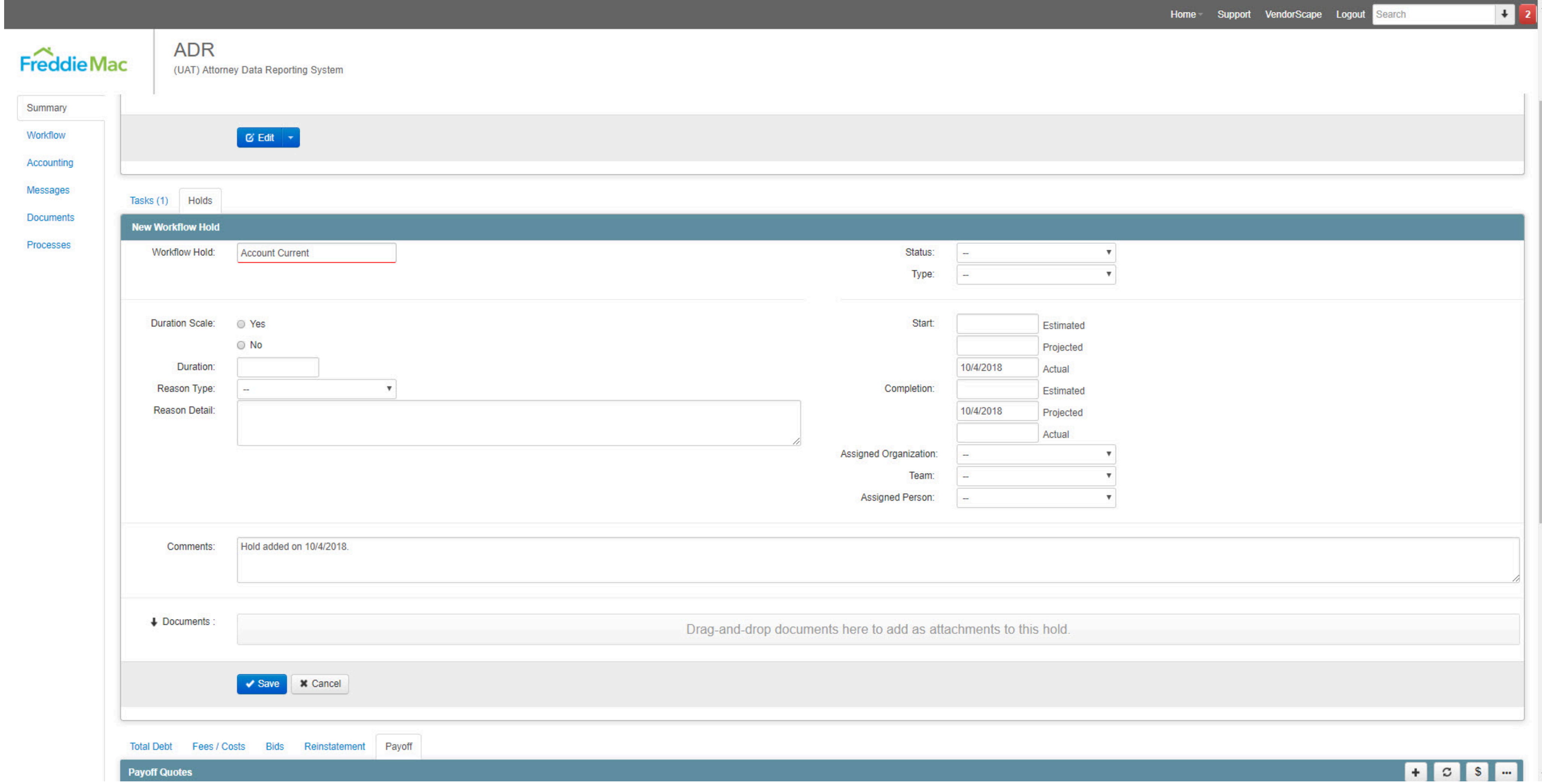


2. Select a Hold type from the Hold drop-down menu.

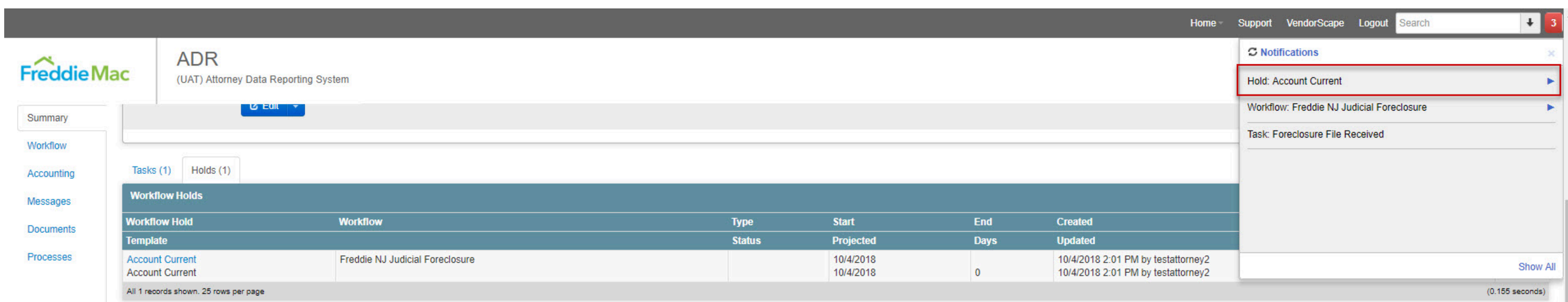


3. The Description field is populated with the Hold type from the Hold drop-down menu.
Note: The auto-populated description can be used or you can enter a different description.

- 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.

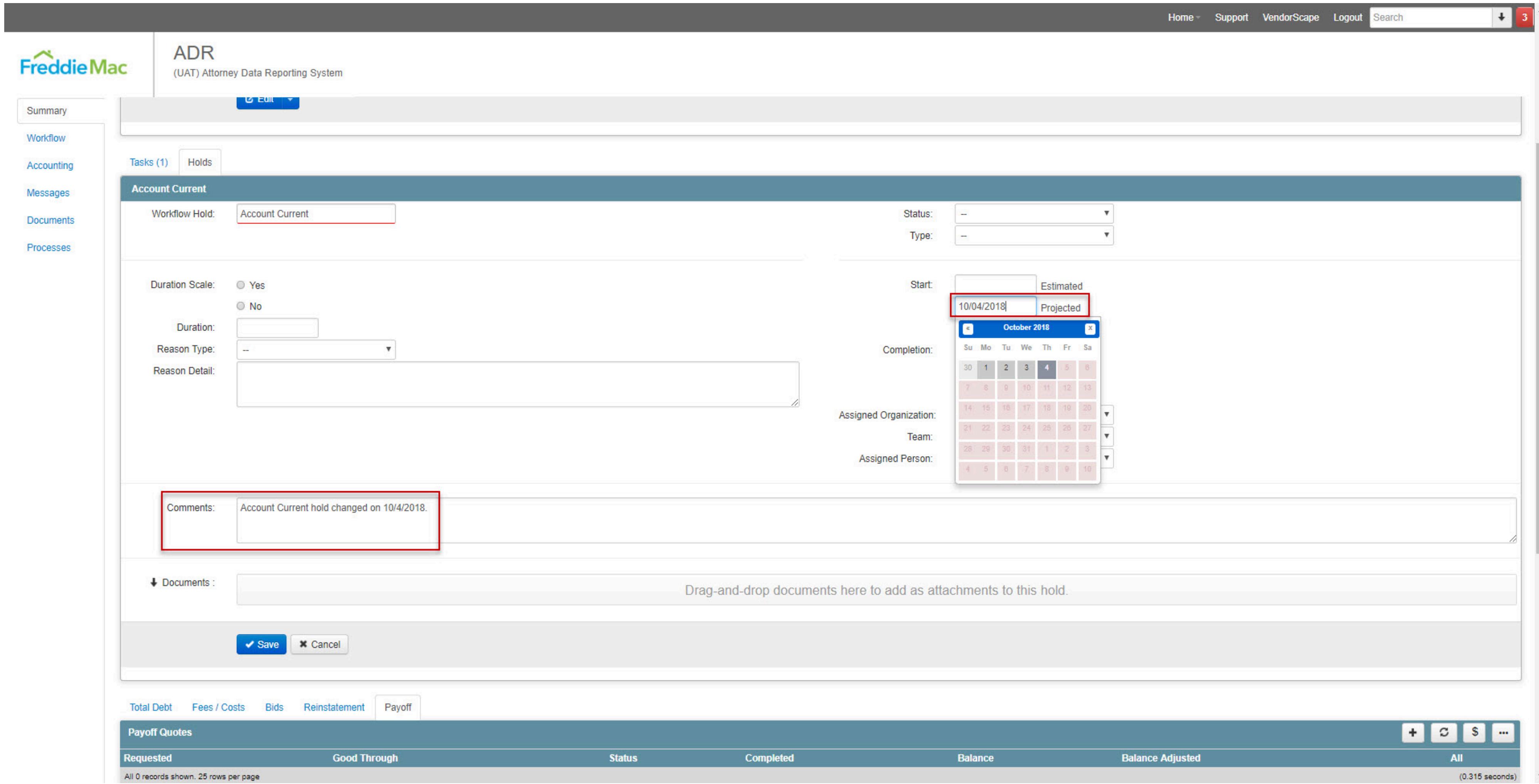


Priority message notification icon is populated.

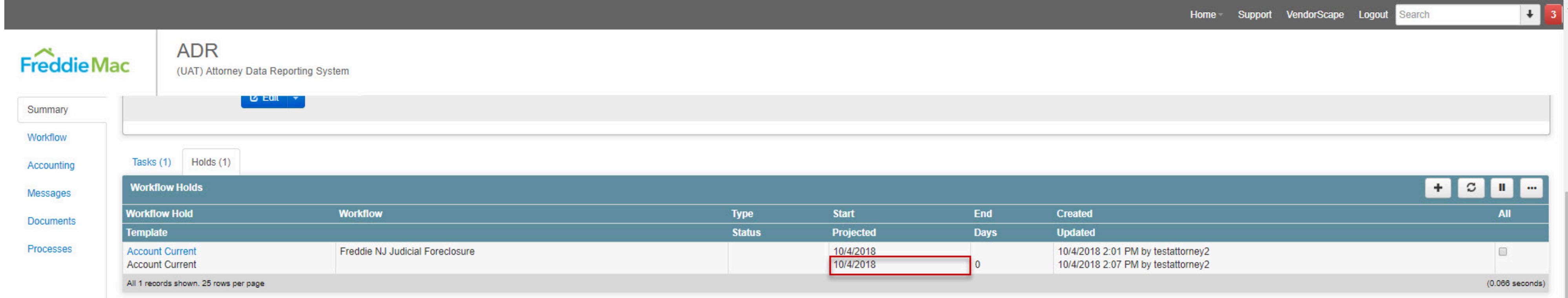


4.2 REPROJECTING A HOLD

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'

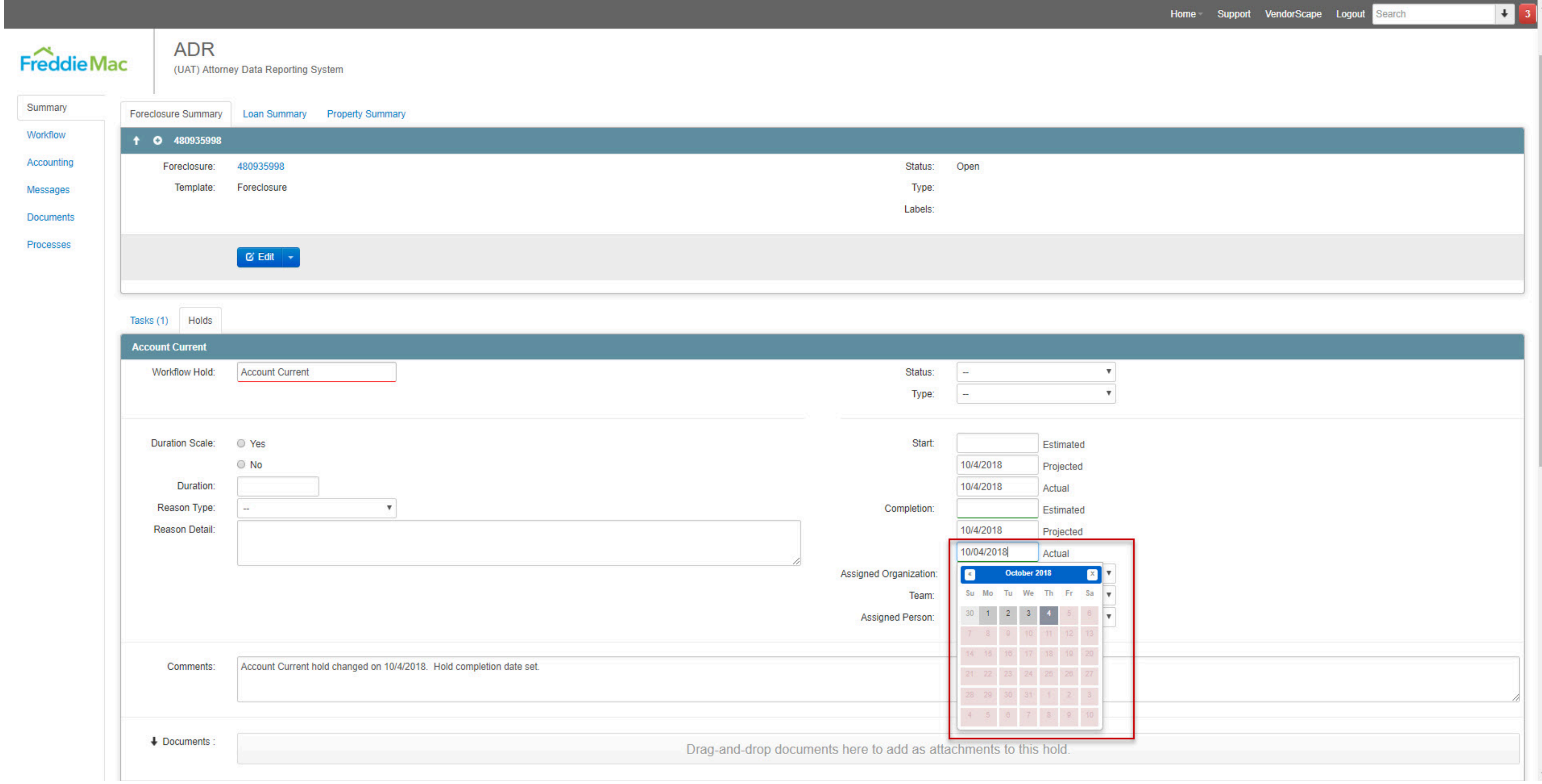


4. Projected date shows as updated within the panel



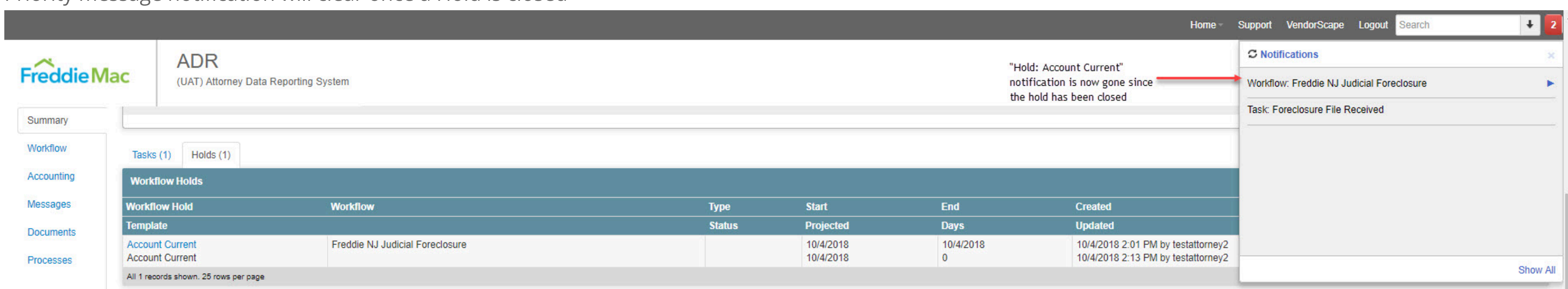
4.3 COMPLETE A HOLD

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



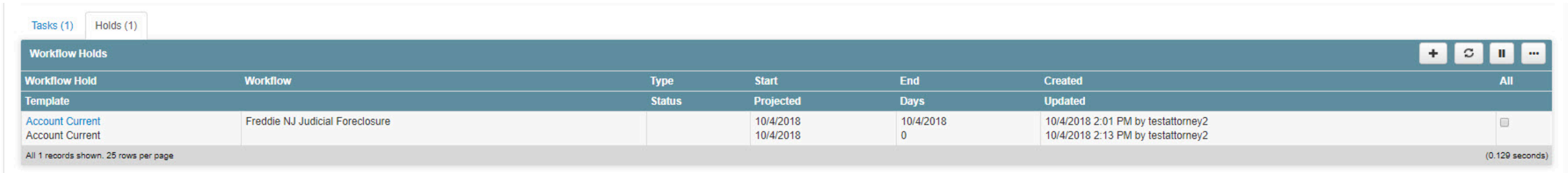
3. Select ‘Save’. Hold is now closed

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



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.



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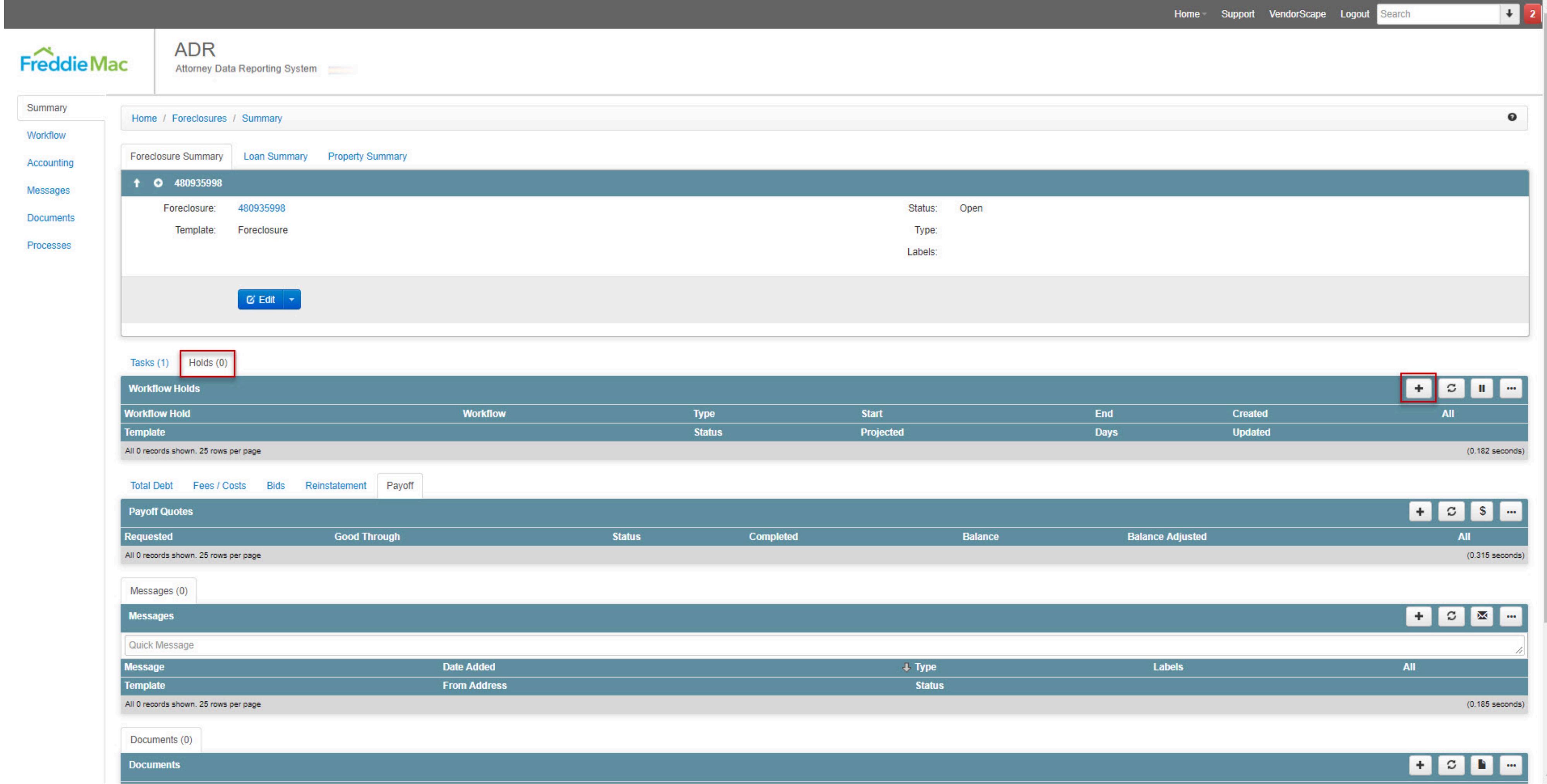
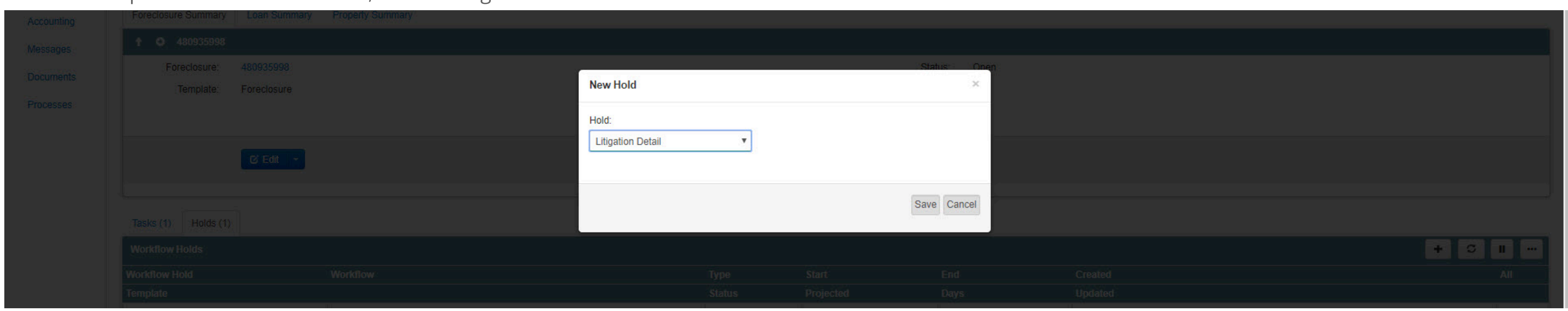
5 LITIGATION DETAIL

5.1 ADDING LITIGATION DETAIL

1. Click on Holds tab.



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



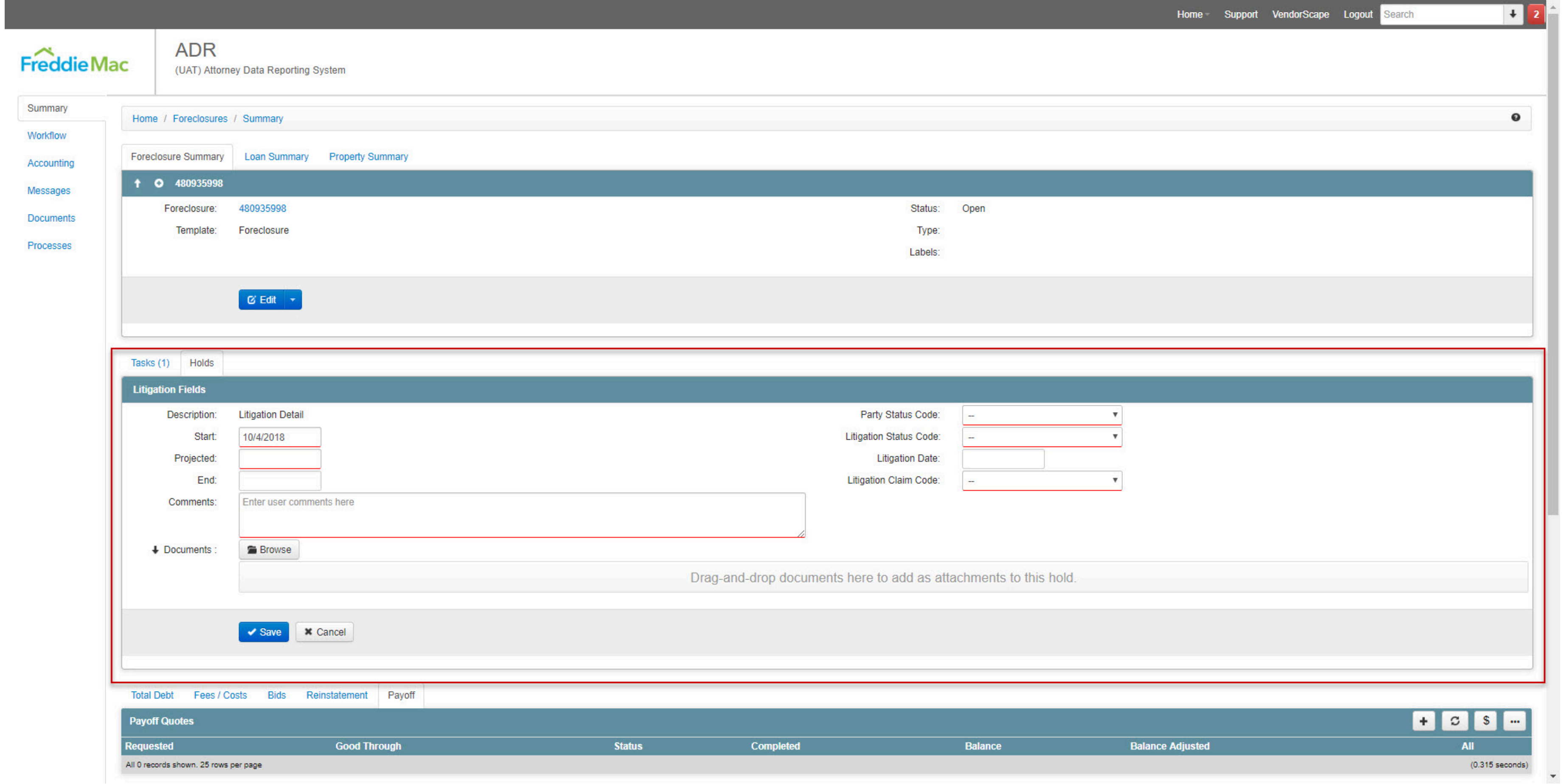
3. Litigation Details form will render. The following fields are required:

- 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

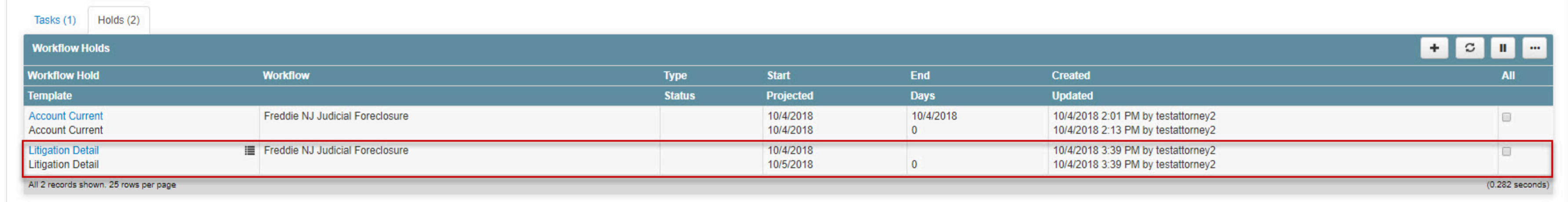


4. Select 'Save' upon entering required fields

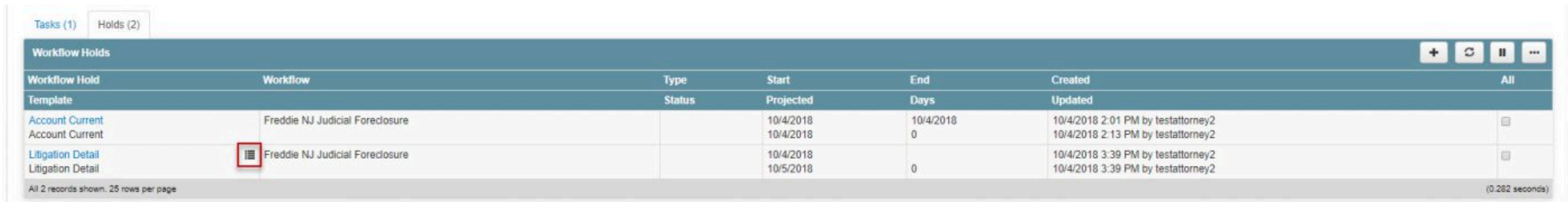
5. Hold panel displays the following:

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

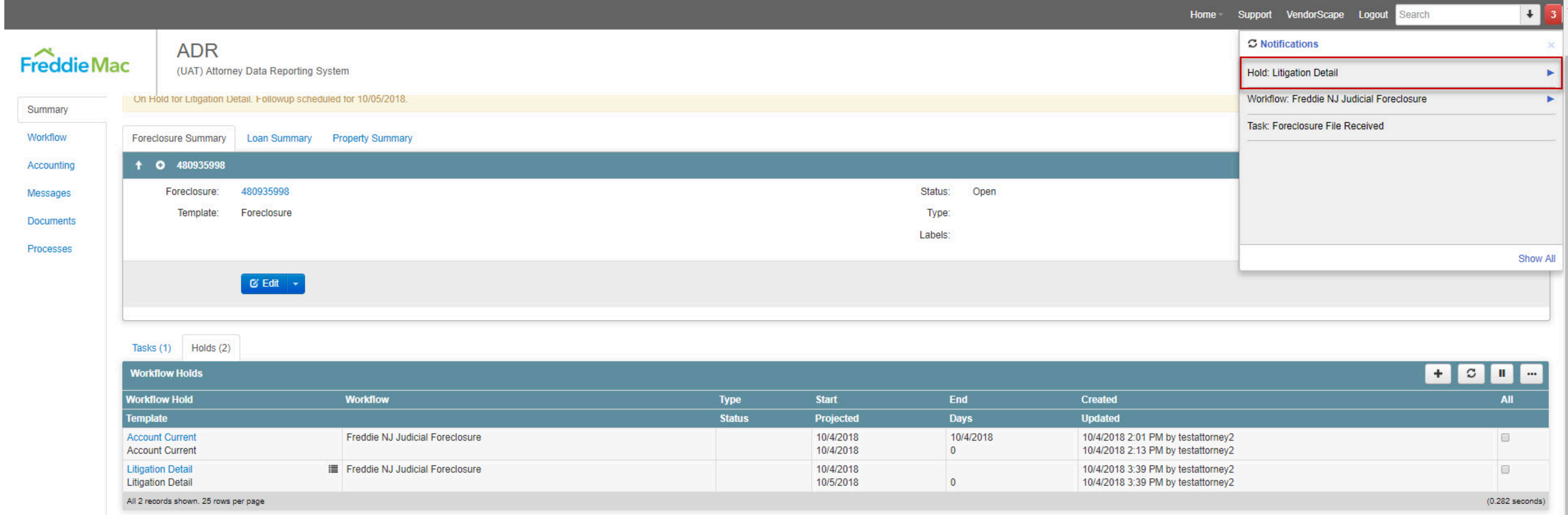
  Note: If the hold is open, the number of days is based on the start date to the current date. If the hold is closed, the number of days is based on the start date to the closed date.

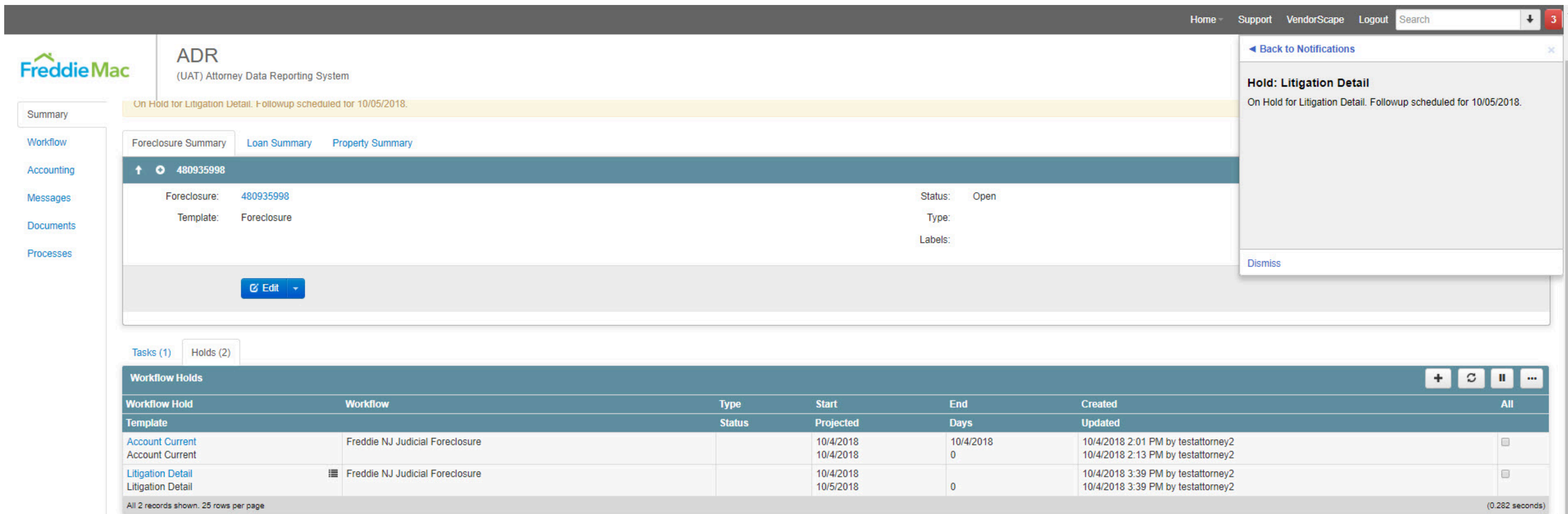


6. Review the Litigation detail by clicking on the icon next to the Hold Name hyperlink



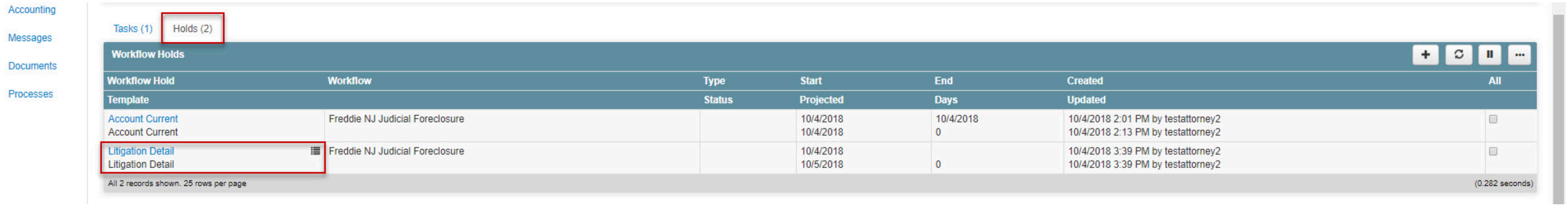
7. The Litigation Detail will be listed in the priority messages. Click on arrow for further details.





5.2 REMOVE LITIGATION DETAIL

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

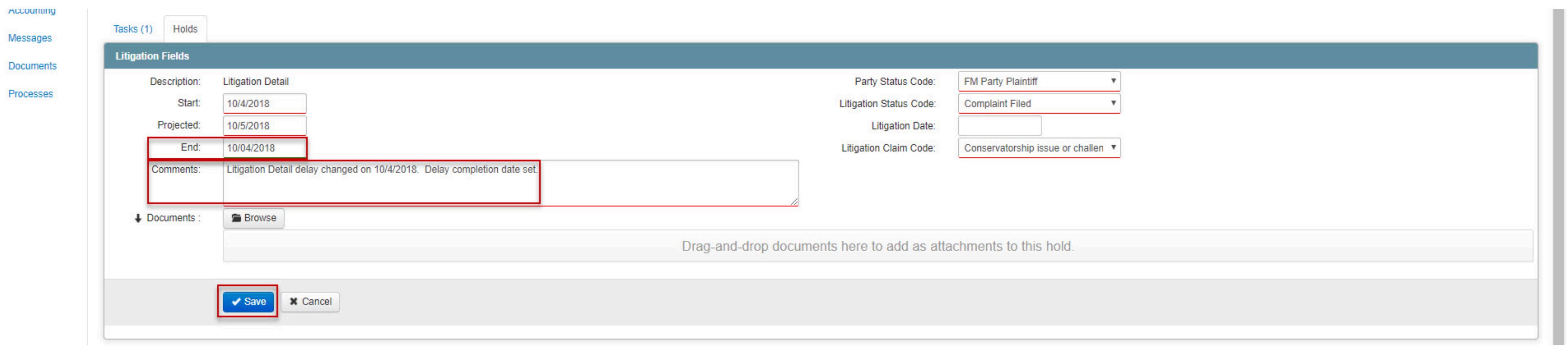


2. Enter 'End' date field.

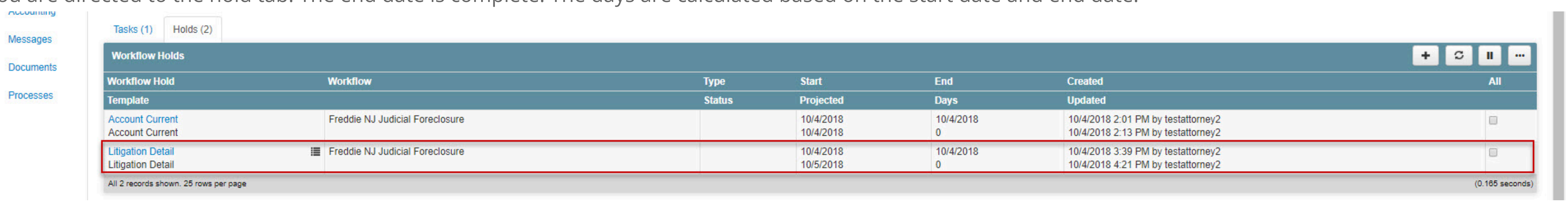
   Note: This can be a current or past date, but cannot be a future date.

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.

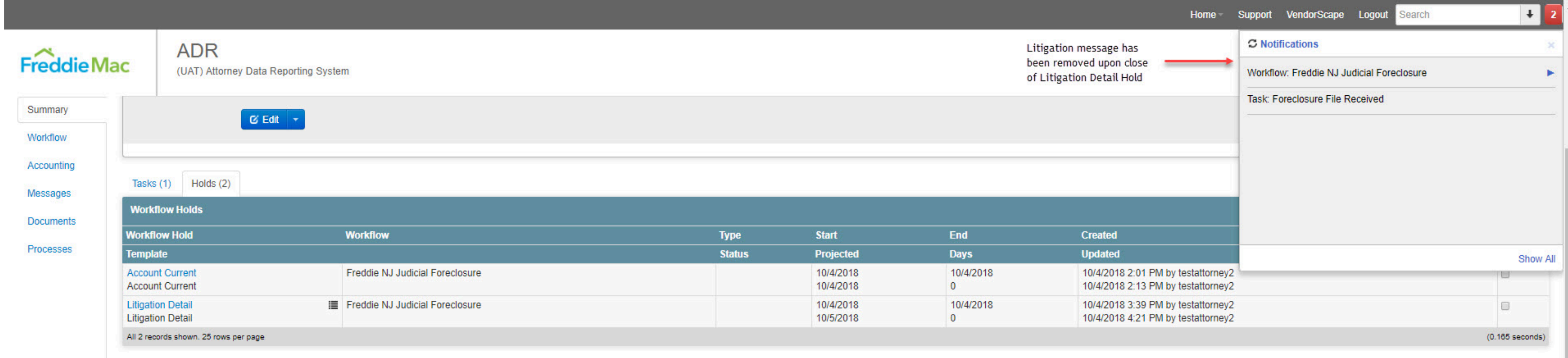
4. Click Save.



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.

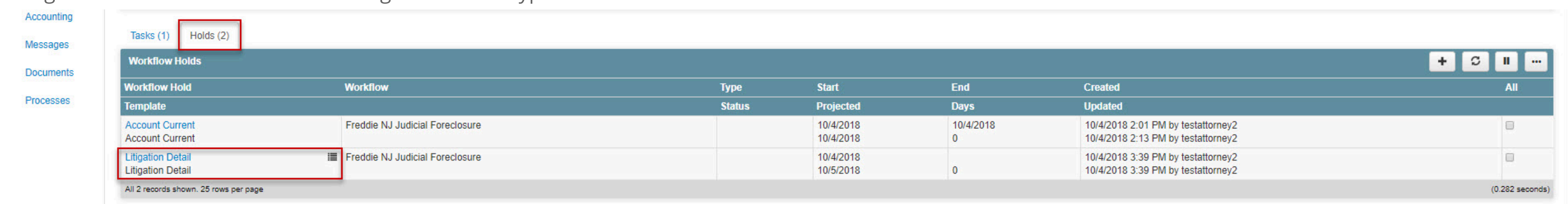


6. The priority message has been removed.

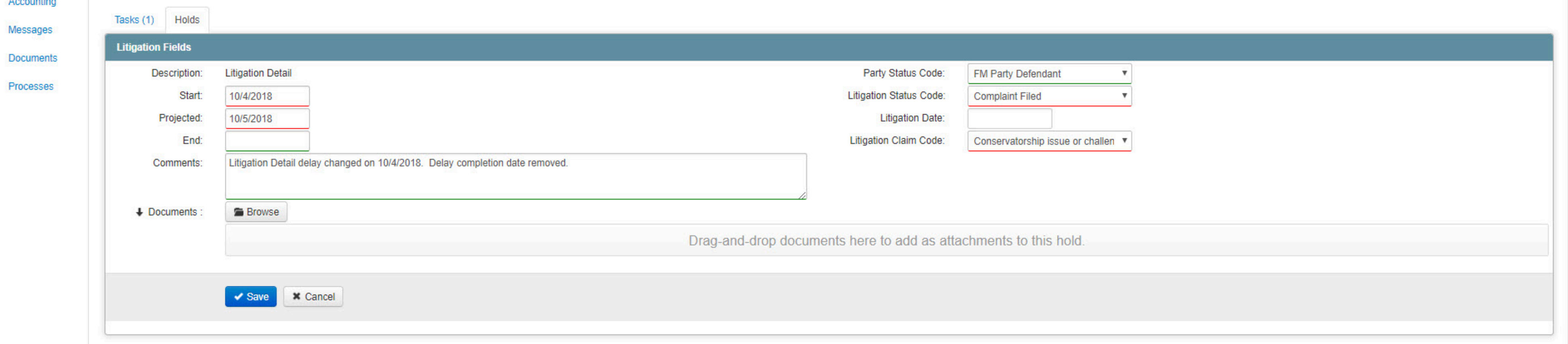


5.3 UPDATE LITIGATION DETAIL

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

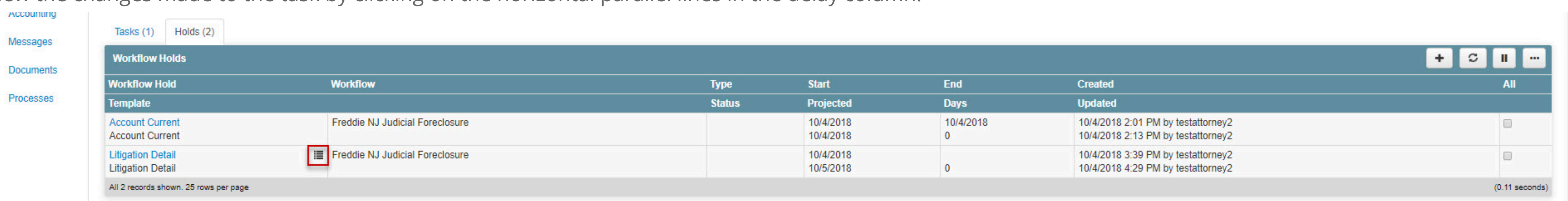


2. Perform all necessary updates within the hold, including re-activating the hold by removing the End Date. All rules mentioned above apply to performing updates. **Note**: If the End Date of the Hold is more than 180 days in the past, none of the information can be updated. This is for auditing and 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.

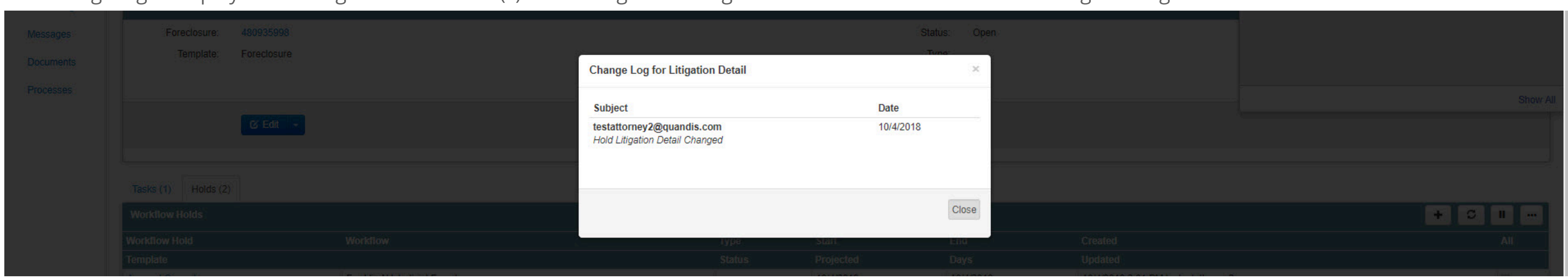


5.4 VIEW LITIGATION DETAIL REVISIONS

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



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.



5.5 WHEN TO USE LITIGATION DETAIL

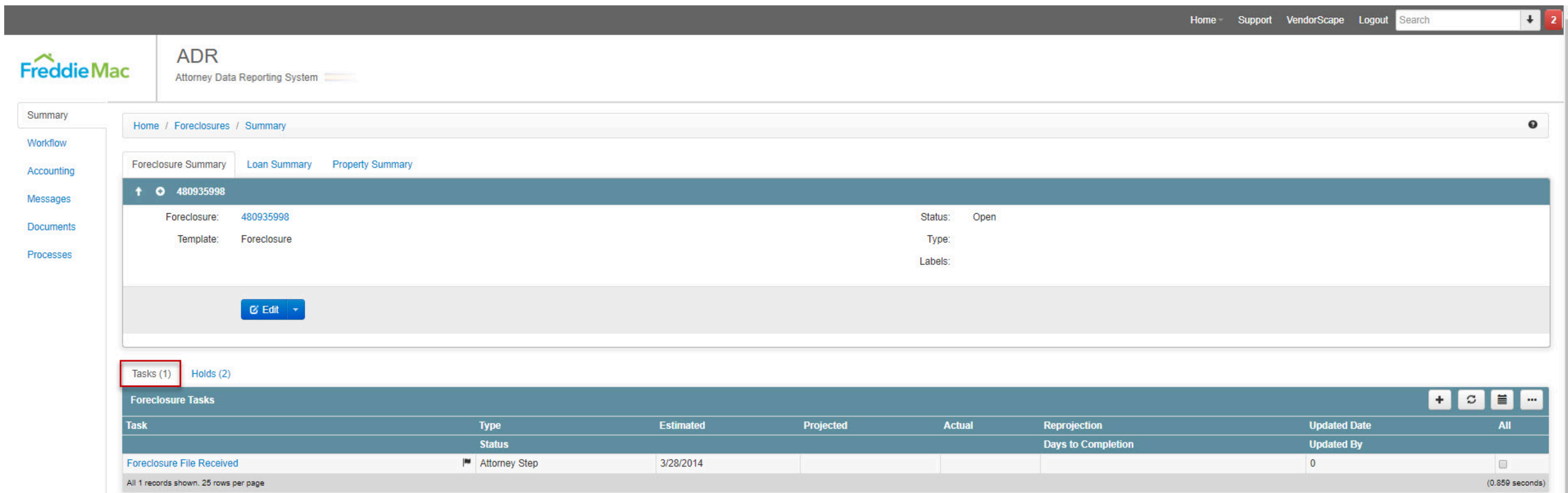
Refer to your Freddie Mac guidelines to determine when to use the Litigation Detail feature and when you should or should not proceed with the Foreclosure or Bankruptcy action whenever resolving a litigated matter.

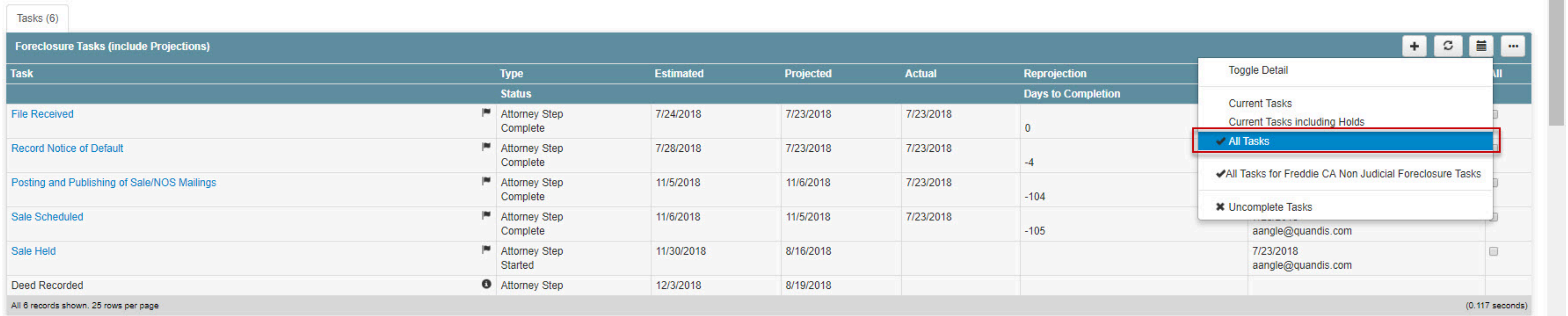
6 FORECLOSURE TASKS

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

6.1 COMPLETING TASKS

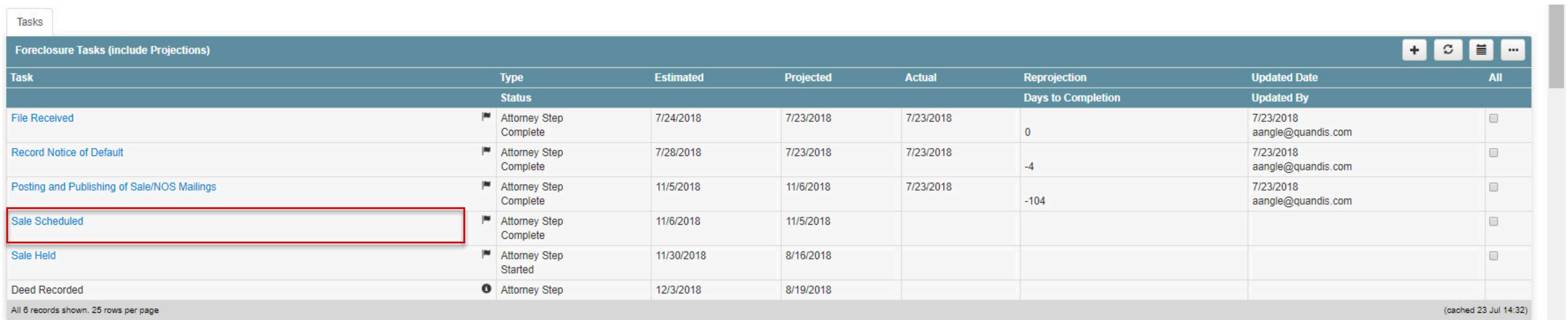
The due date for the first task is based on the start date entered when the foreclosure was opened. If an error was made in entering the start date, you will need to close the foreclosure and open a new foreclosure. Please refer to the Closing the Foreclosure [#_Closing_the_Foreclosure] section for instructions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





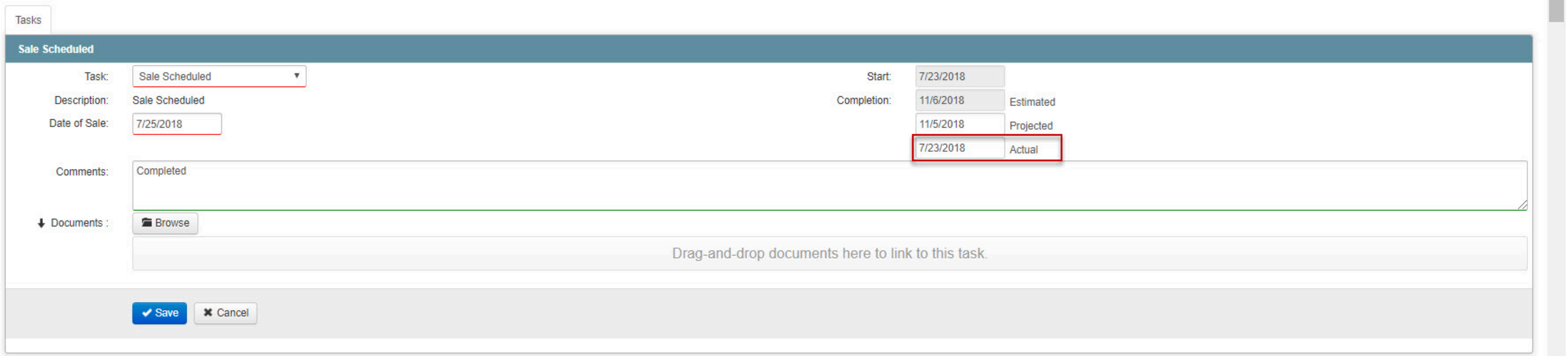
1.Navigate to Tasks tab

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

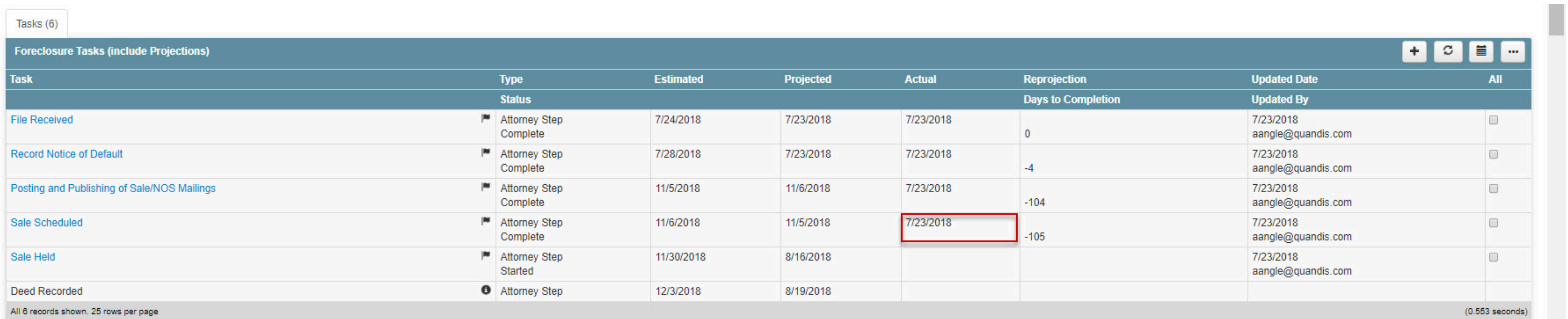


3. Click on a task name hyperlink.

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.



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)

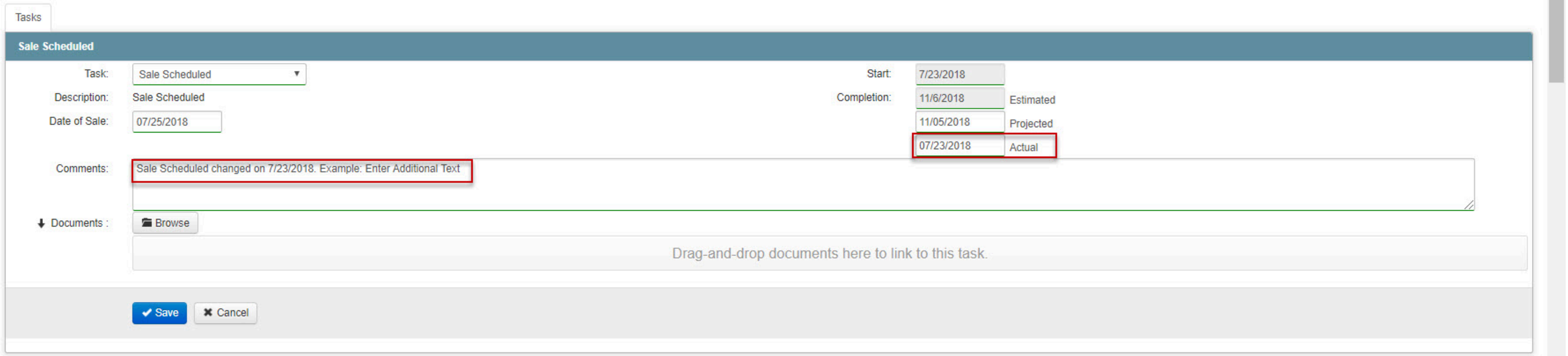
Foreclosure Tasks (include Projections)

Task	Type / Status	Estimated	Projected	Actual	Reprojection / Days to Completion	Updated Date / Updated By	All
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			7/23/2018 aangle@quandis.com	
Deed Recorded	Attorney Step	12/3/2018	8/19/2018				

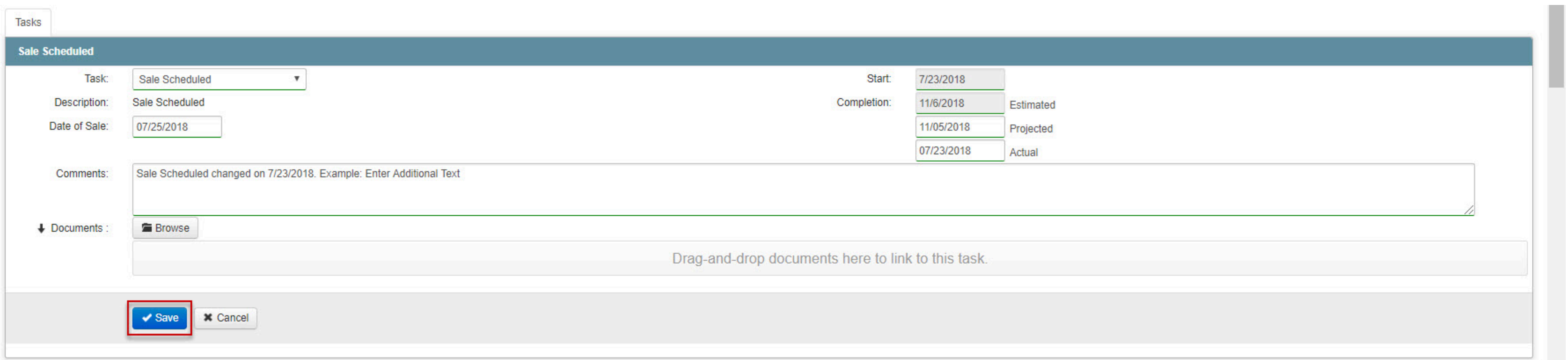
All 6 records shown. 25 rows per page (0.553 seconds)

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

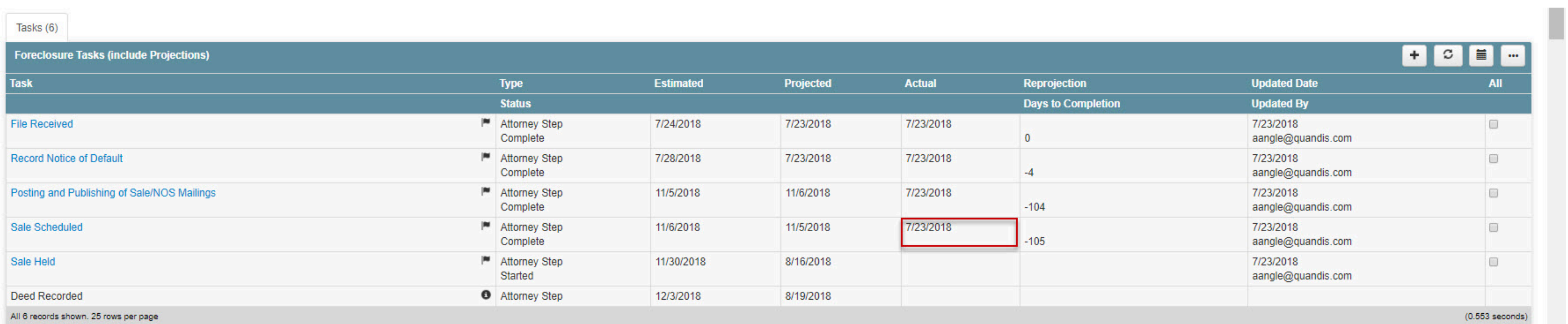
You can either delete this comment and enter a comment or you can append a comment to the default comment. In this example, the comment was appended.



6. Click Save.



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



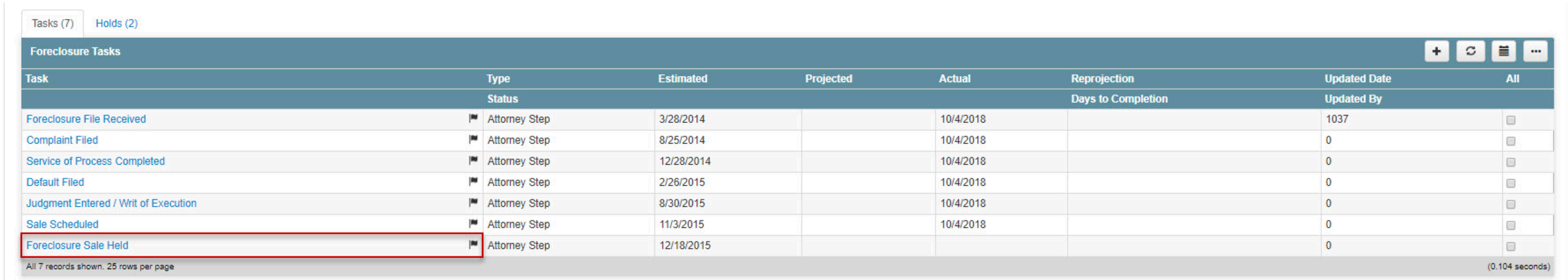
8. This view will list only those tasks that are due to be completed. You will not see all tasks associated with the foreclosure. To view all tasks, please refer to the Viewing All Tasks section of this document.

6.2 FORECLOSURE SALE HELD TASK

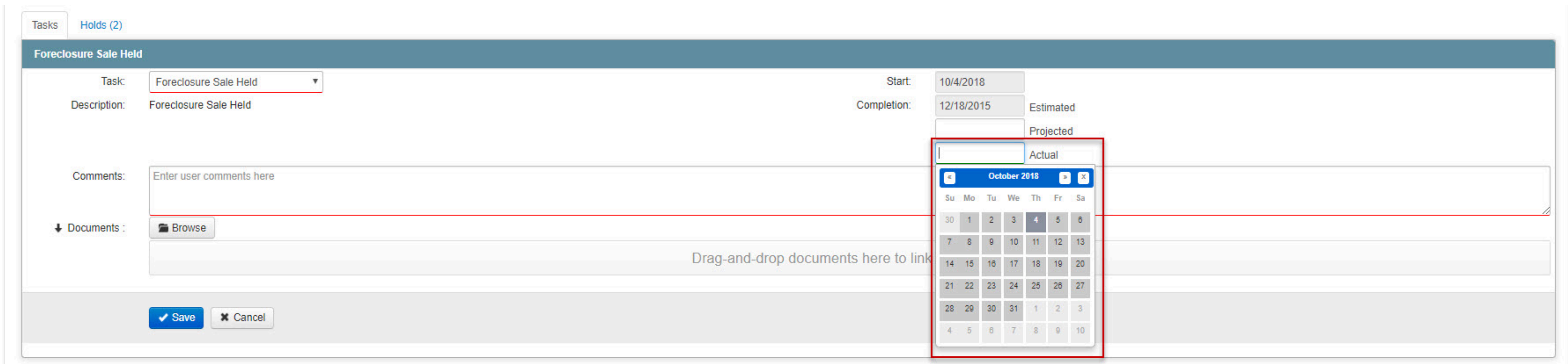
PLEASE NOTE: Your screens may slightly differ from what is below.

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

1. Click on the “Foreclosure Sale Held” hyperlink.



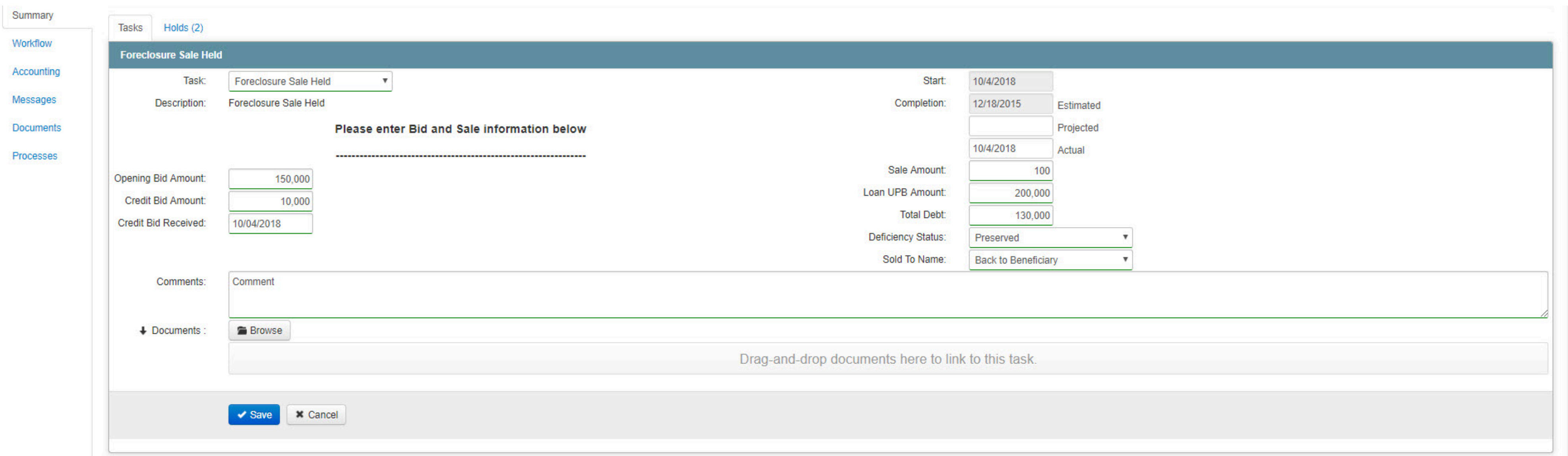
2. Enter the date the Foreclosure Sale was held in the Actual Date field. As with all other tasks, you cannot enter a future date in this field. This date cannot be prior to the completion date of the prior task.



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

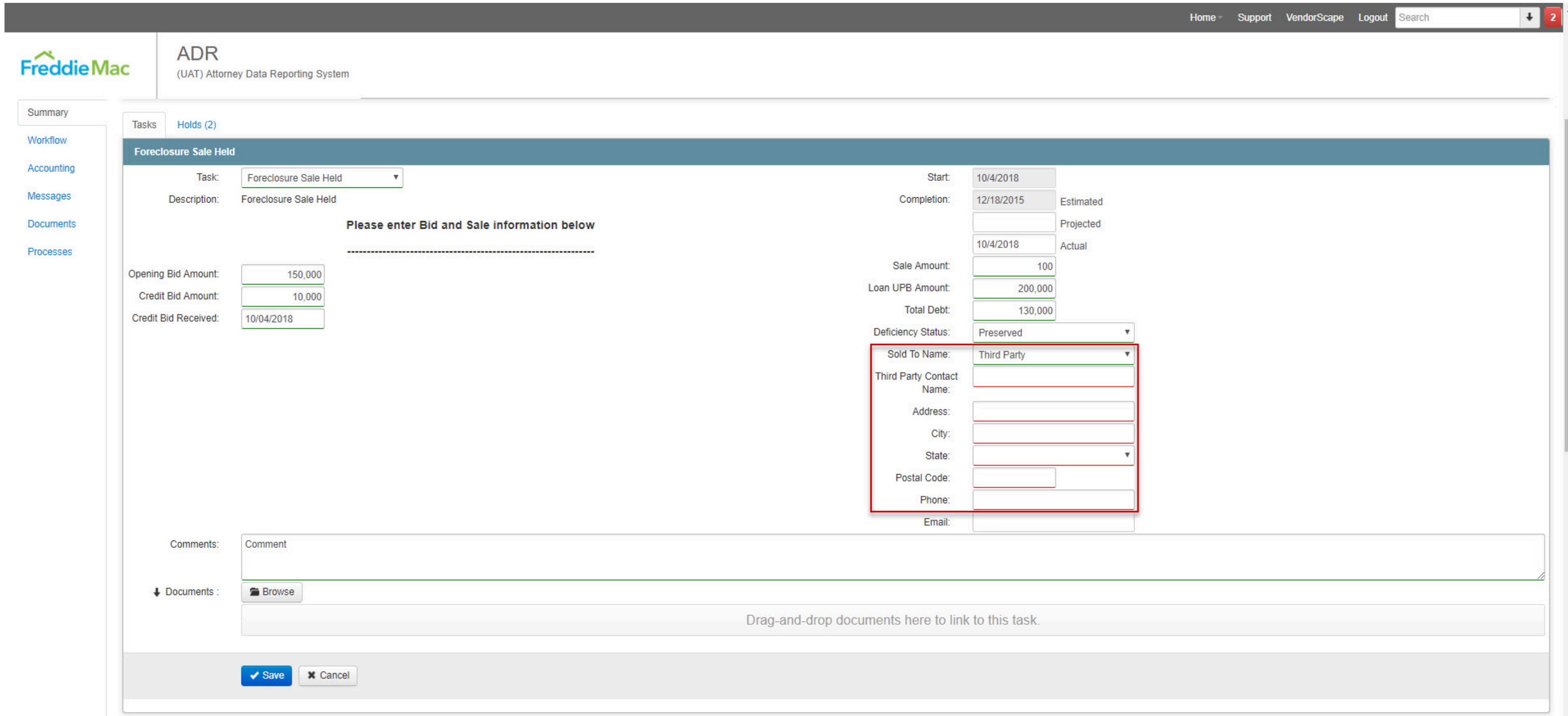
Field Name	Comments
Opening Bid Amount	Value must be greater than 0

Credit Bid Amount	Value must be greater than 0
Credit Bid Received	Date Received
Sale Amount	• 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	• Back to Beneficiary or Third Party • If 'Third Party' is selected additional fields are required

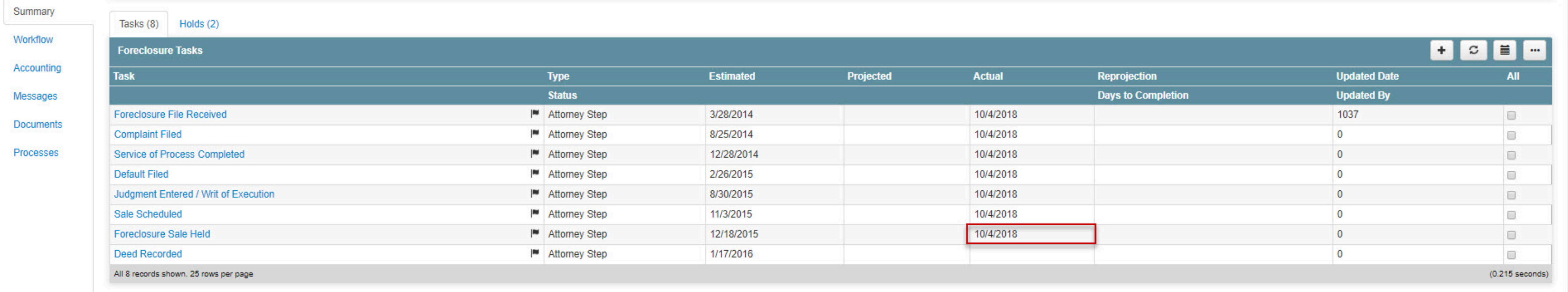


4. When Third Party is selected, Third Party Contact fields are displayed. The following fields are required:
   - Third Party Contact Name
   - Address

- City
- State
- Postal Code
- Phone

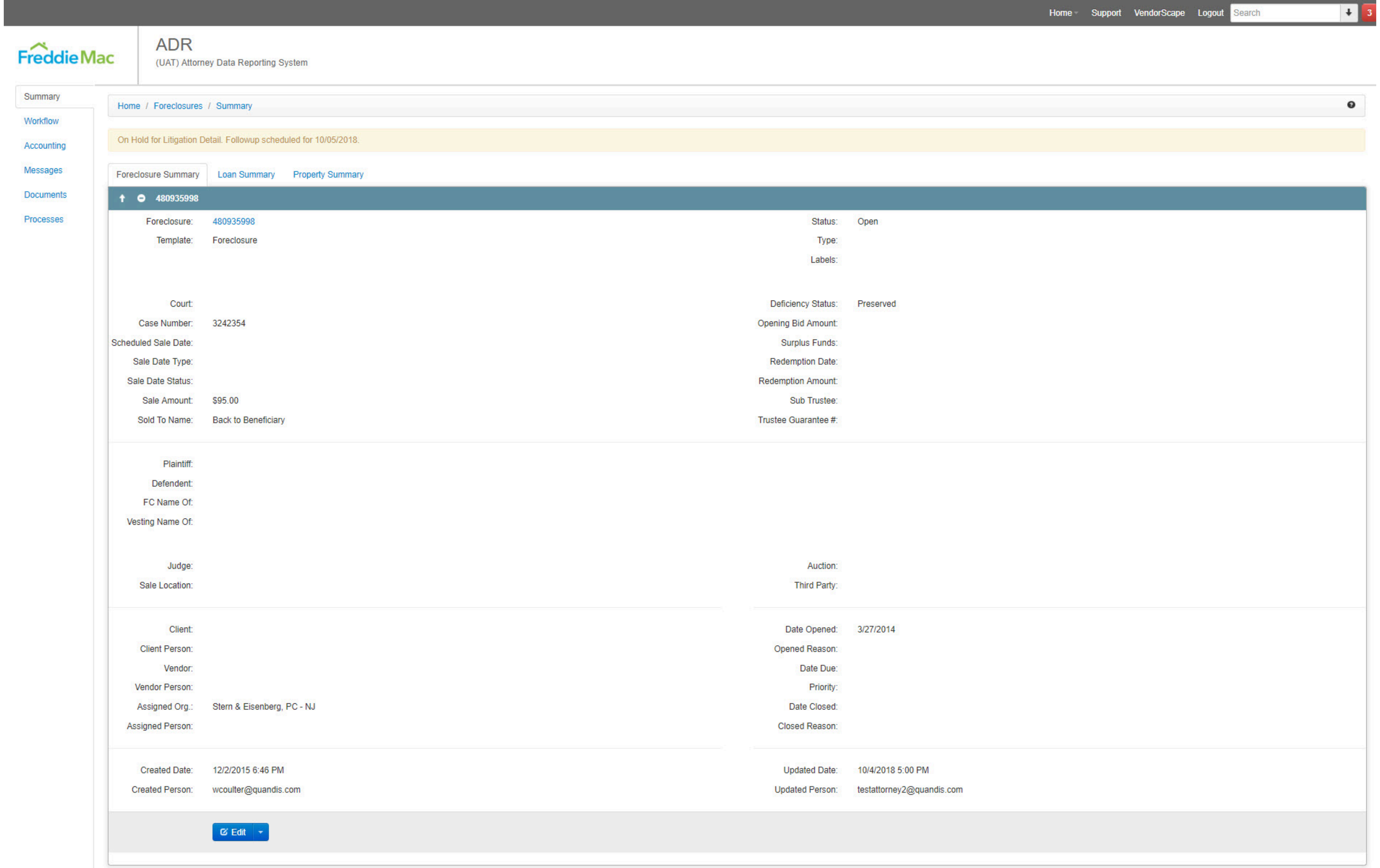


5. Once all data has been entered, click Save.
6. Actual Completion column is populated with the date entered in the Actual date field.



Task	Type / Status	Estimated	Projected	Actual	Reprojection / Days to Completion	Updated Date / Updated By	All
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				0	

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”.



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".

Home Support VendorScape Logout Search 3

FreddieMac

ADR

Attorney Data Reporting System

- Summary
- Workflow
- Accounting
- Messages
- Documents
- Processes

Home / Foreclosures / Summary

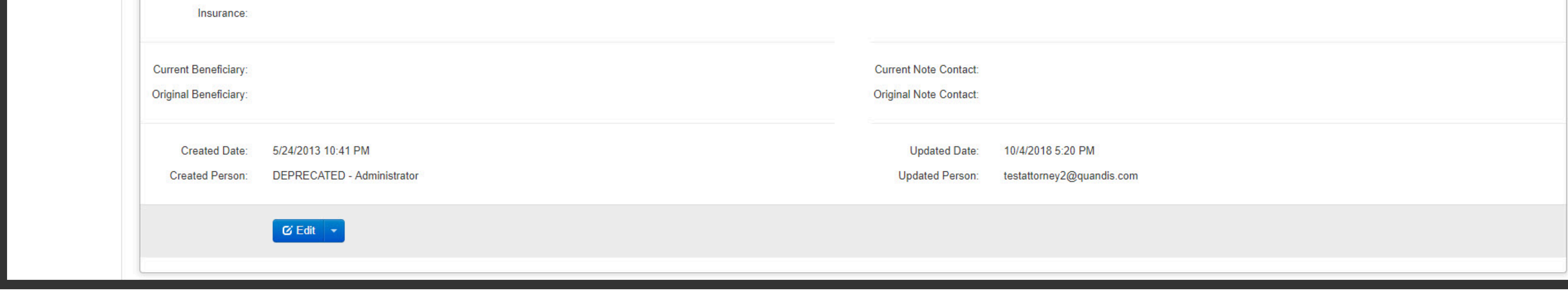
On Hold for Litigation Detail. Followup scheduled for 10/05/2018.

Foreclosure Summary | Loan Summary | Property Summary

480935998

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:	



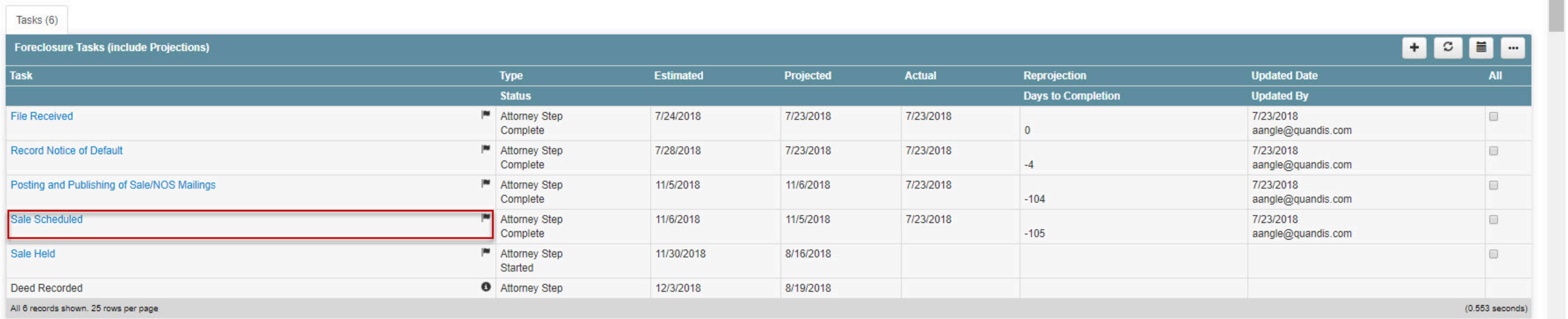
6.3 REPROJECTING A TASK

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

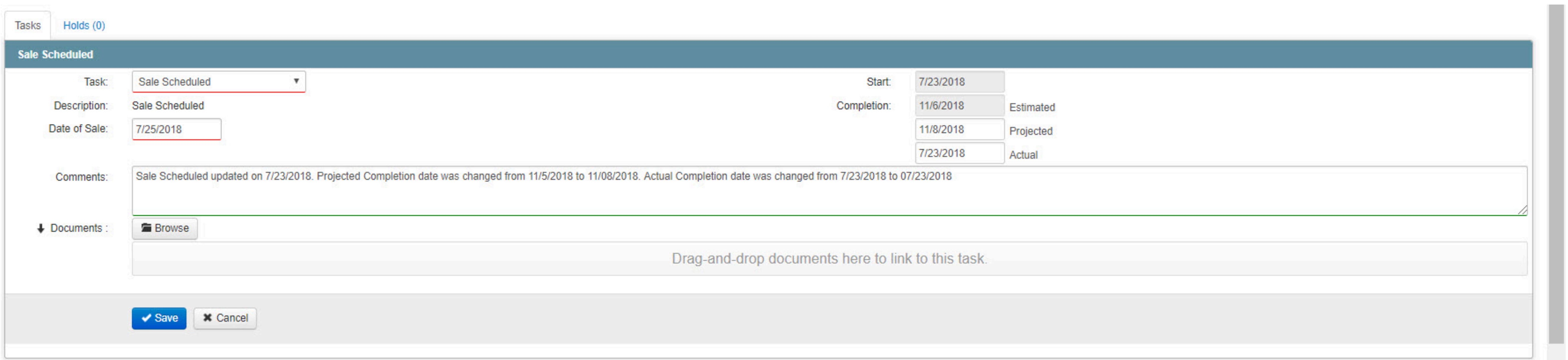
PLEASE NOTE: Your screens may slightly differ from what is below.

1. Click on task name hyperlink

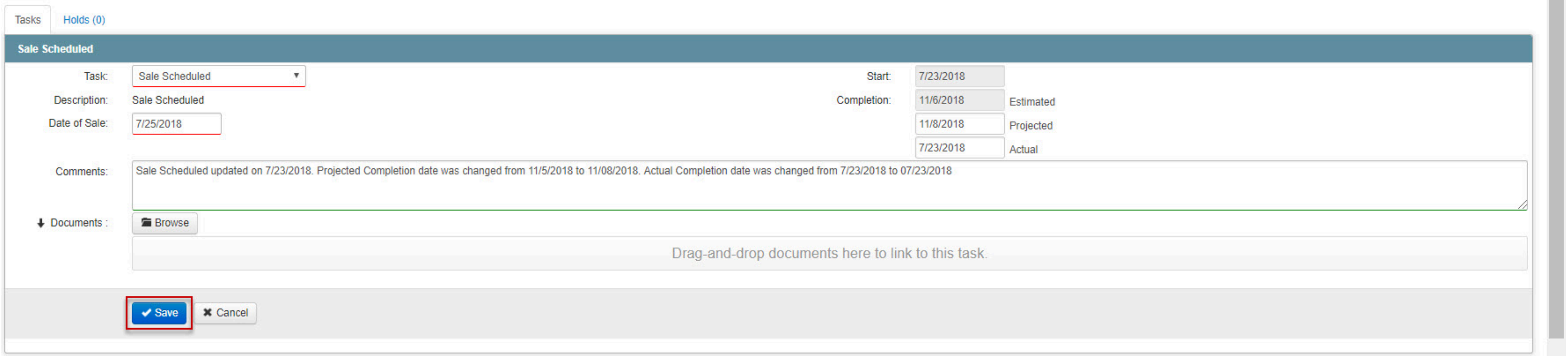


2. Task opens in Edit mode (your screen may slightly differ from below).

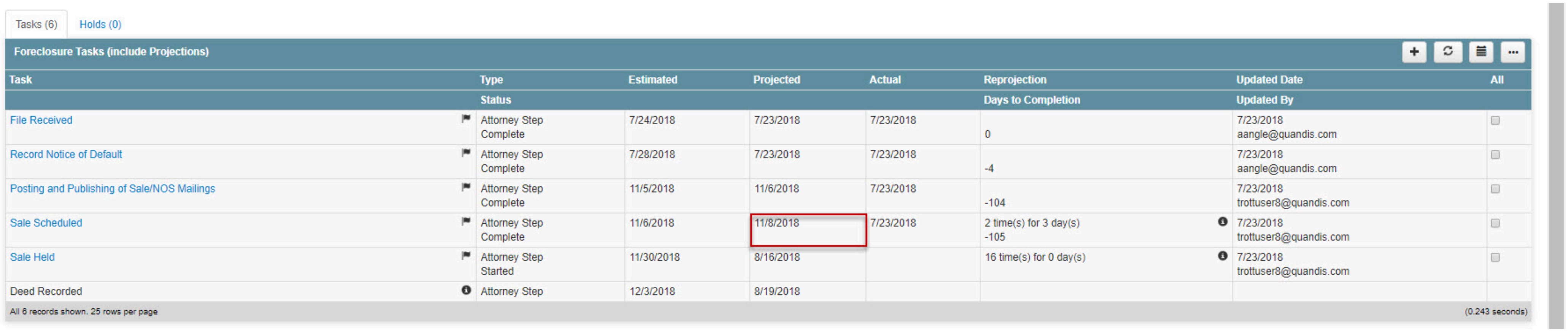
- Enter the date the task is expected to be completed in the Projected Date field.
- Enter commentary in the Body field.



3. Click Save.



4. The projected date has been updated.



Task	Type / Status	Estimated	Projected	Actual	Reprojection / Days to Completion	Updated Date / Updated By	All
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 trottuser8@quandis.com	
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	
Sale Held	Attorney Step Started	11/30/2018	8/16/2018		16 time(s) for 0 day(s)	7/23/2018 trottuser8@quandis.com	
Deed Recorded	Attorney Step	12/3/2018	8/19/2018				

All 6 records shown. 25 rows per page (0.243 seconds)

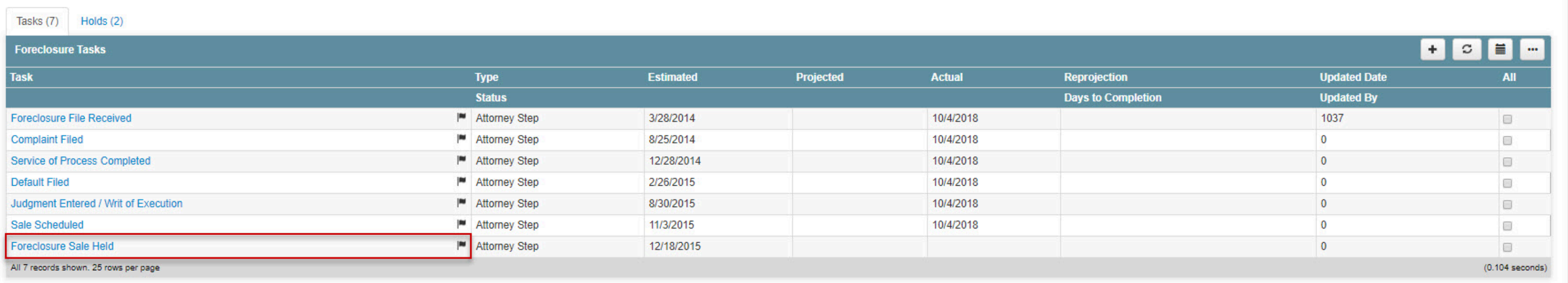
****Sale Scheduled date cannot be projected more than 360 days from the existing projected dated******

6.4 REPROJECTING FORECLOSURE SALE HELD TASK

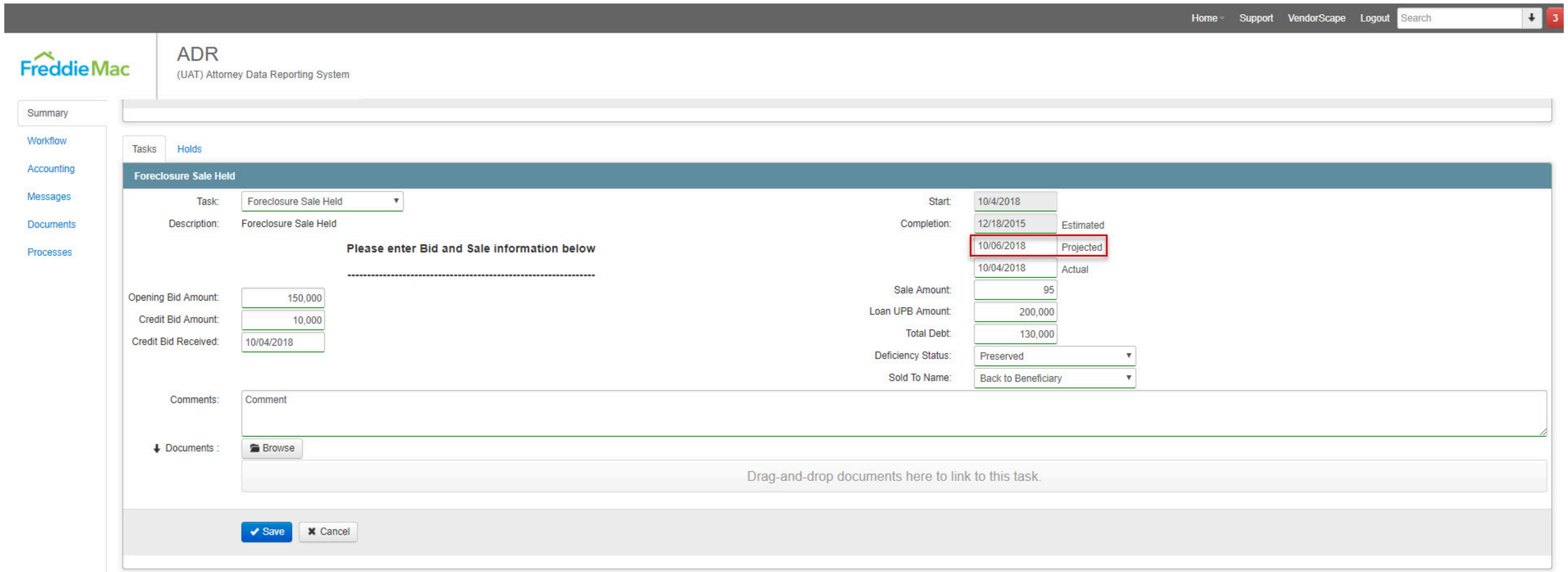
PLEASE NOTE: Your screens may slightly differ from what is below.

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

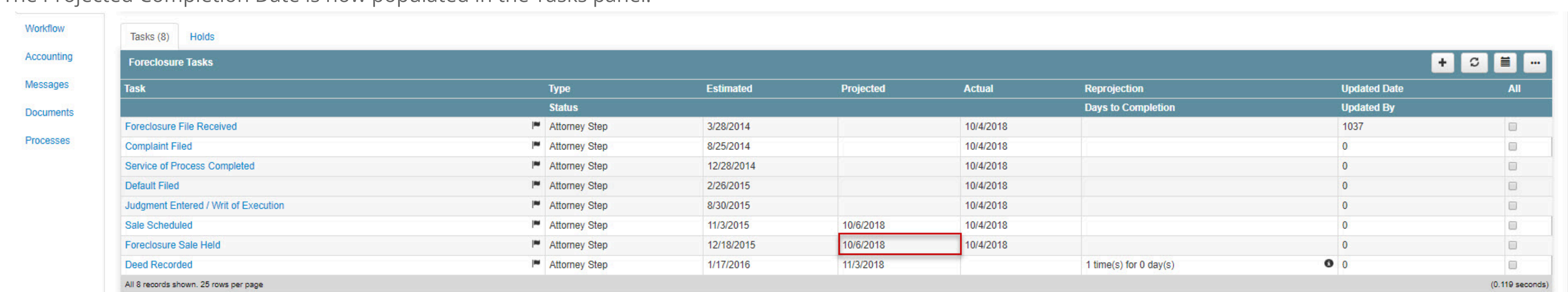
1. Click on the Foreclosure Sale Held hyperlink.



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.



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



6.5 BULK UPDATING TASKS

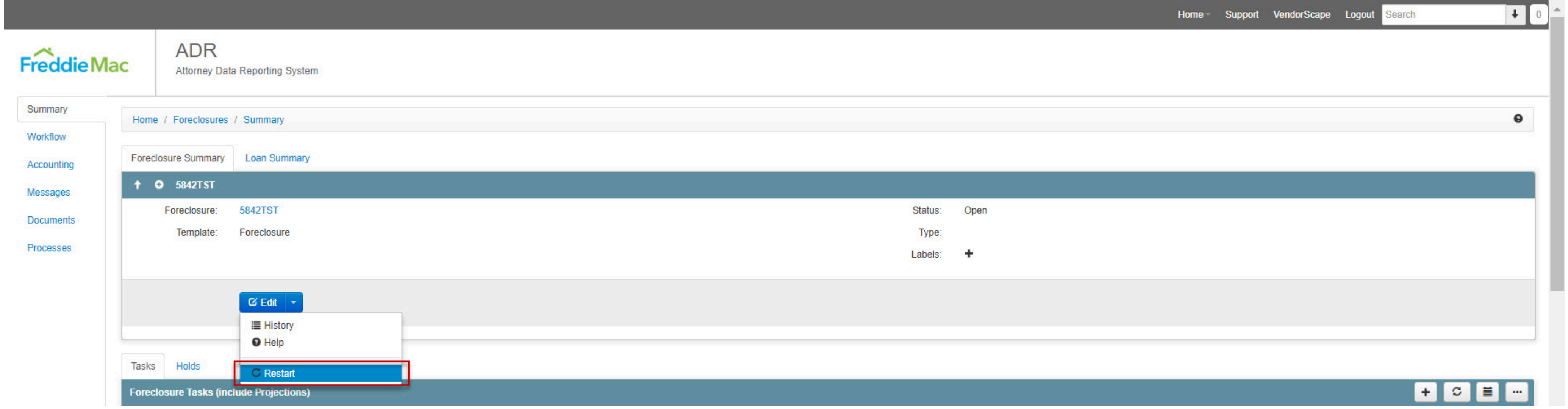
The ability to bulk update Tasks is now available in the production environment. These are the step-by-step instructions:

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] .
    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

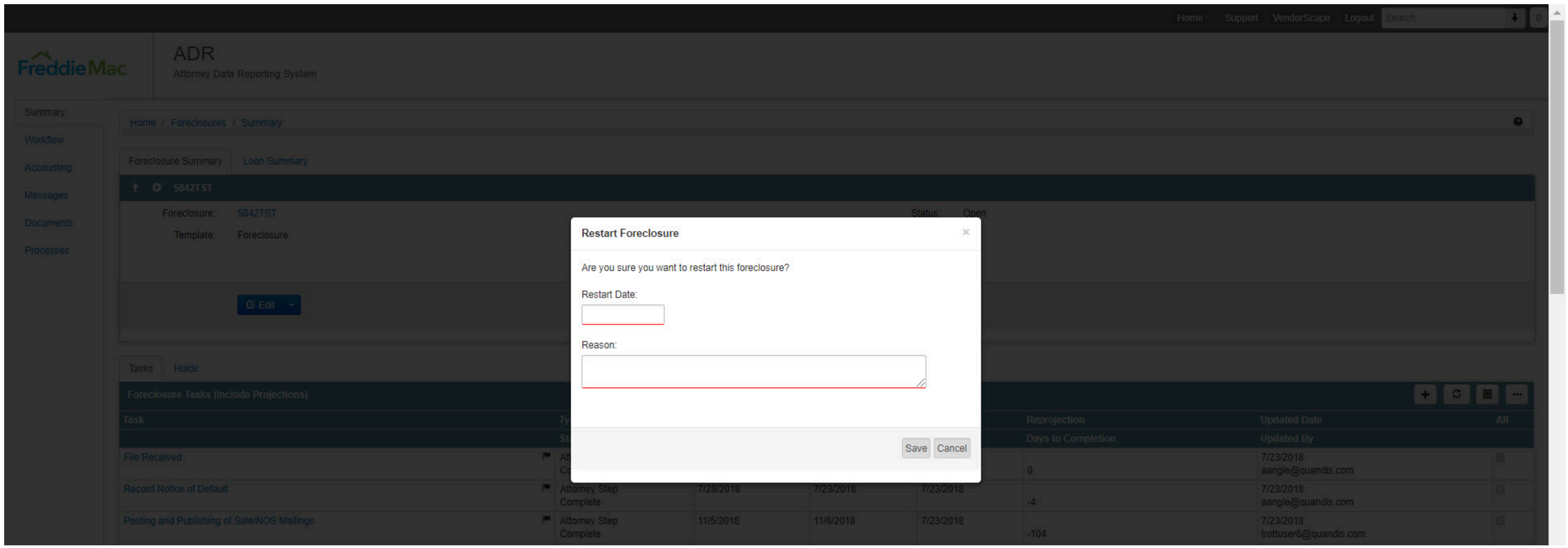
---

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.



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



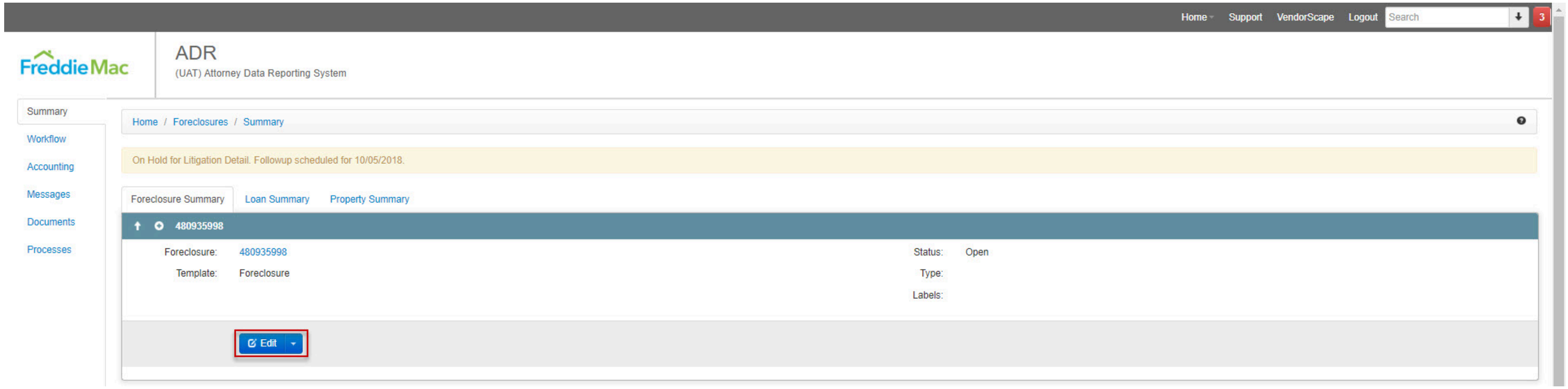
2. In the popup window, enter the new/correct Start Date in the Restart Date field, and provide the reason for the Restart, then click "Save".

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).



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

Home Support VendorScape Logout Search 3

FreddieMac

ADR

(UAT) Attorney Data Reporting System

- 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
Template: Foreclosure

Status: Closed
Type: --

Court: --
Case Number: 3242354
Scheduled Sale Date:
Sale Date Type: --
Sale Date Status: --
Sale Amount: $95.00
Sold To Name: Back to Beneficiary

Deficiency Status: Preserved
Opening Bid Amount:
Surplus Funds:
Redemption Date:
Redemption Amount:
Sub Trustee: --
Trustee Guarantee #:

Plaintiff:
Defendent:
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

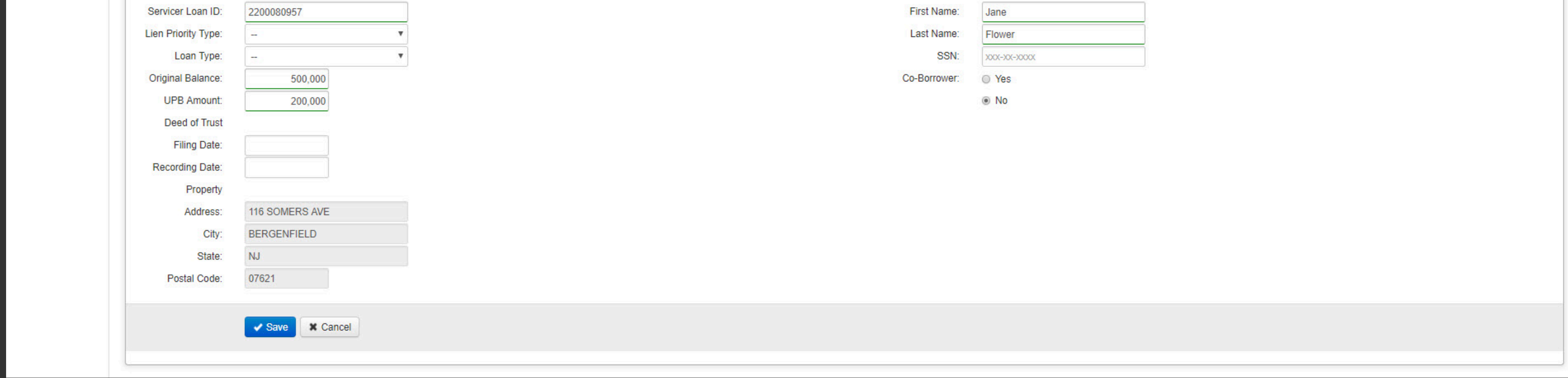
Third Party: Name, Address, City, --, ZIP Code, Phone, Email

Assigned Org.: Stern & Eisenberg, PC - NJ
Assigned Person: --

Date Opened: 03/27/2014
Opened Reason: --
Date Due:
Priority:
Date Closed: 10/04/2018
Closed Reason: Opened In Error

Servicer: VPC OCWEN LOAN SERVICING (D

Borrower



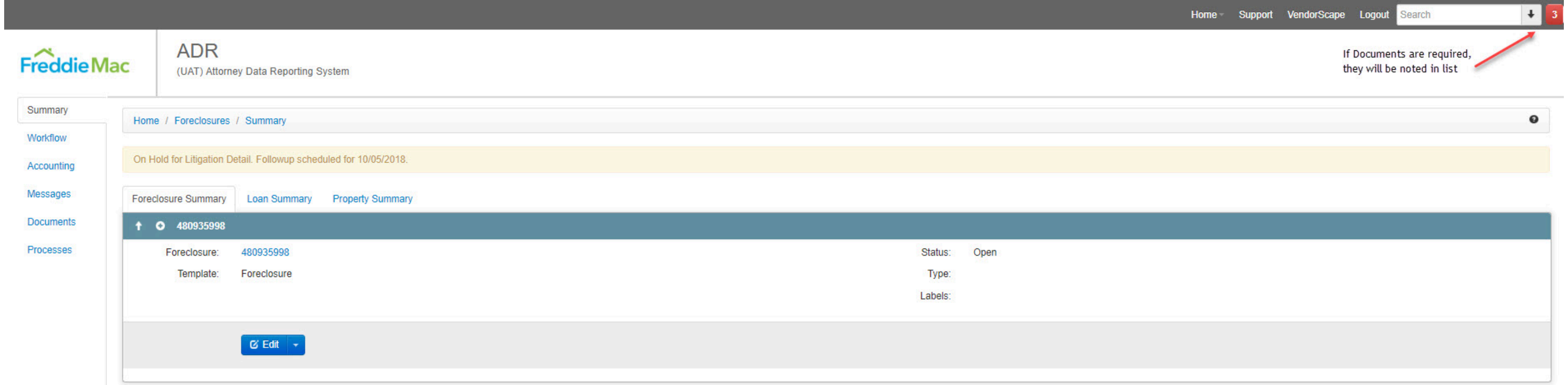
2. The Status will need to be set to “Closed”, and a “Closed Date” and a “Closed Reason” will need to be chosen.

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.



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.

FreddieMac

ADR

(UAT) Attorney Data Reporting System

Borrowers (2) | Loan Data | Related Loans (0)

Borrowers

Borrower / SSN		Loan Number	Property Address / City State Postal Code	Mailing Address / City State Postal Code	Phone / Email	Type / Status	Labels	All
Donna Schmidt XXX-XX-8639		483411981	403 RT 47 S GREEN CREEK, NJ 08219	403 Route 47 South Green Creek, NJ 08219		Primary		
Donna L Schmidt XXX-XX-8639		483411981	403 RT 47 S GREEN CREEK, NJ 08219	403 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
Template: Foreclosure
Status: Closed
Type: --

Court: --
Case Number: F-000902-14
Scheduled Sale Date:
Sale Date Type: --
Sale Date Status: --
Sale Amount:
Sold To Name: --

Deficiency Status: --
Opening Bid Amount:
Surplus Funds:
Redemption Date:
Redemption Amount:
Sub Trustee: --
Trustee Guarantee #:

Plaintiff:

Defendent:

FC The Name Of:

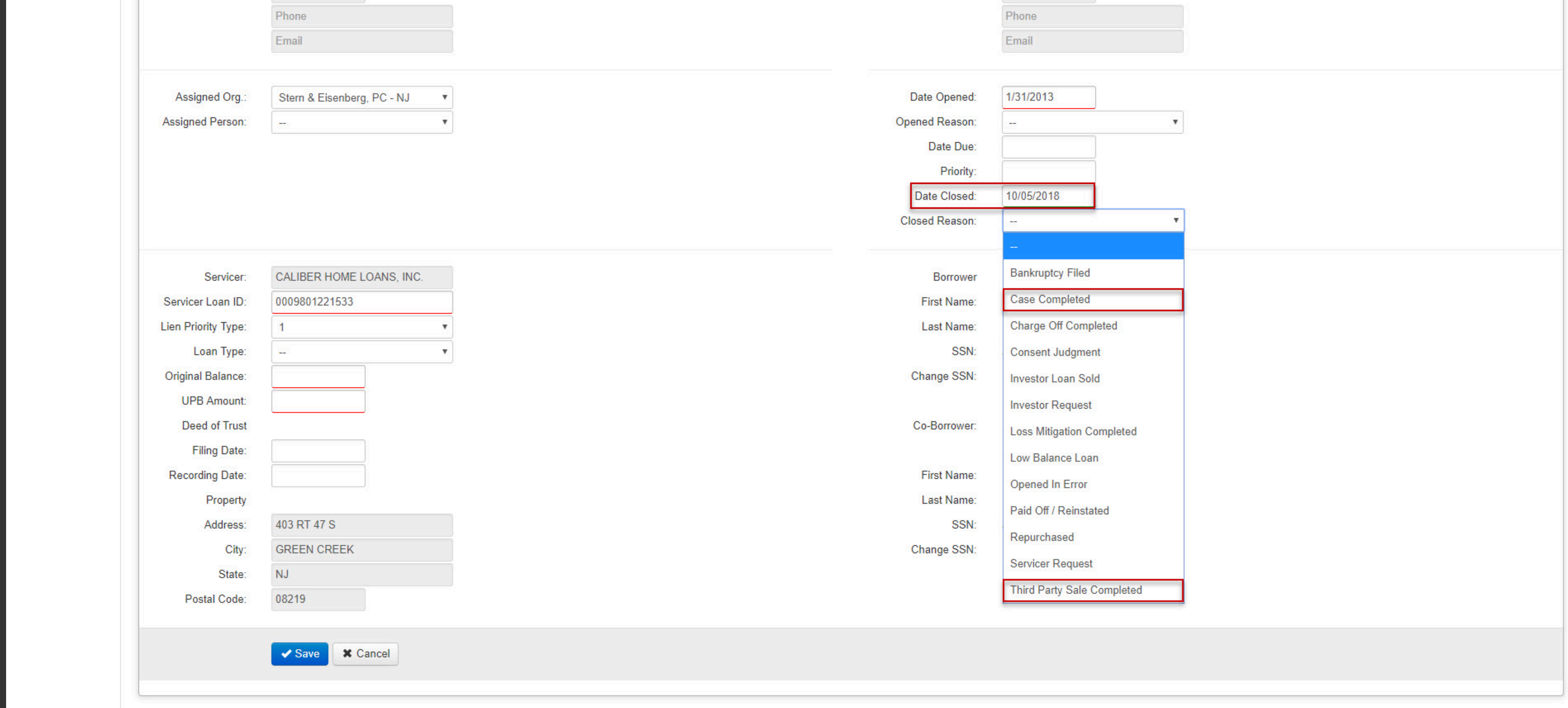
Vesting Name Of:

Judge: Name / Address / City / -- / ZIP Code / Phone / Email

Auction: Name / Address / City / -- / ZIP Code / Phone / Email

Sale Location: Name / Address / City / -- / ZIP Code

Third Party: Name / Address / City / -- / ZIP Code


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

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

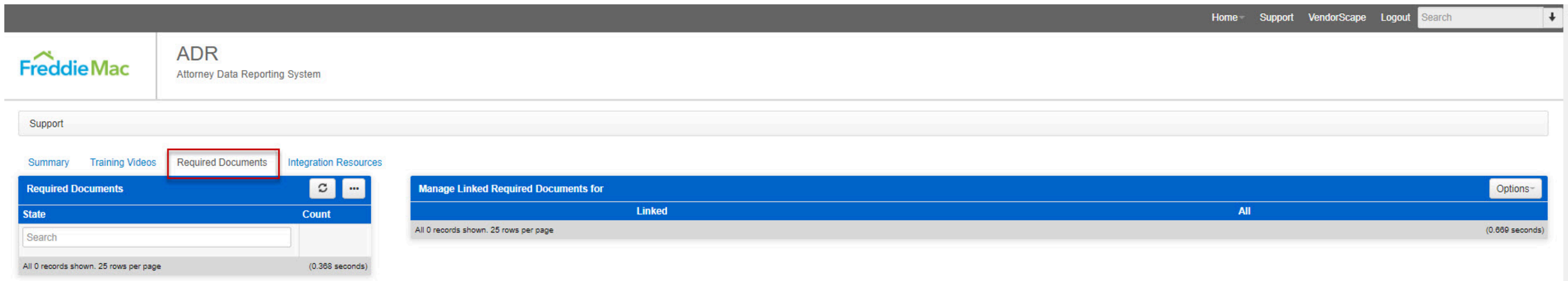
8.2 ADDING REQUIRED DOCUMENTS

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”.

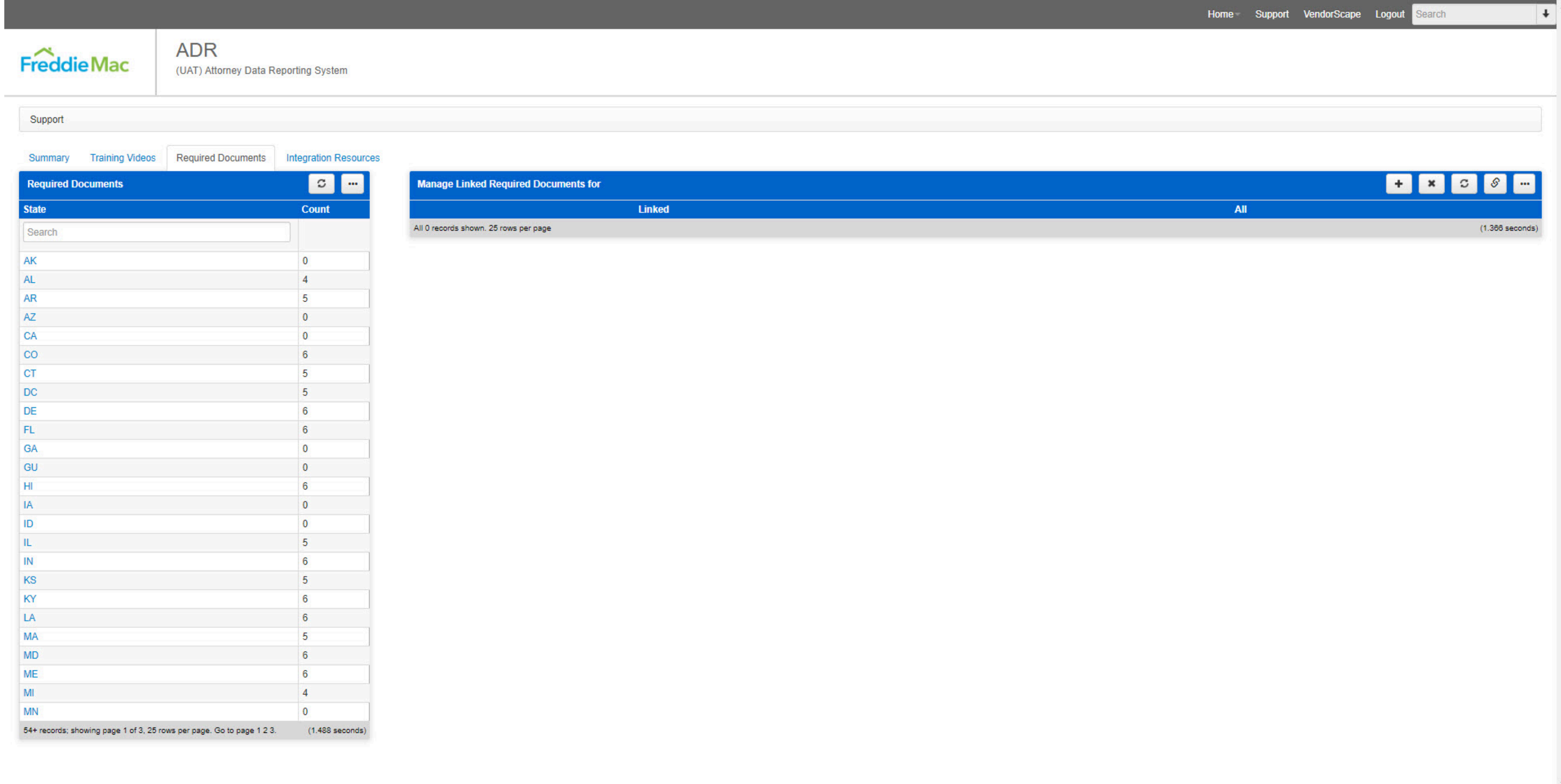
8.2.1 REQUIRED DOCUMENT LIST

1. Click on Support.

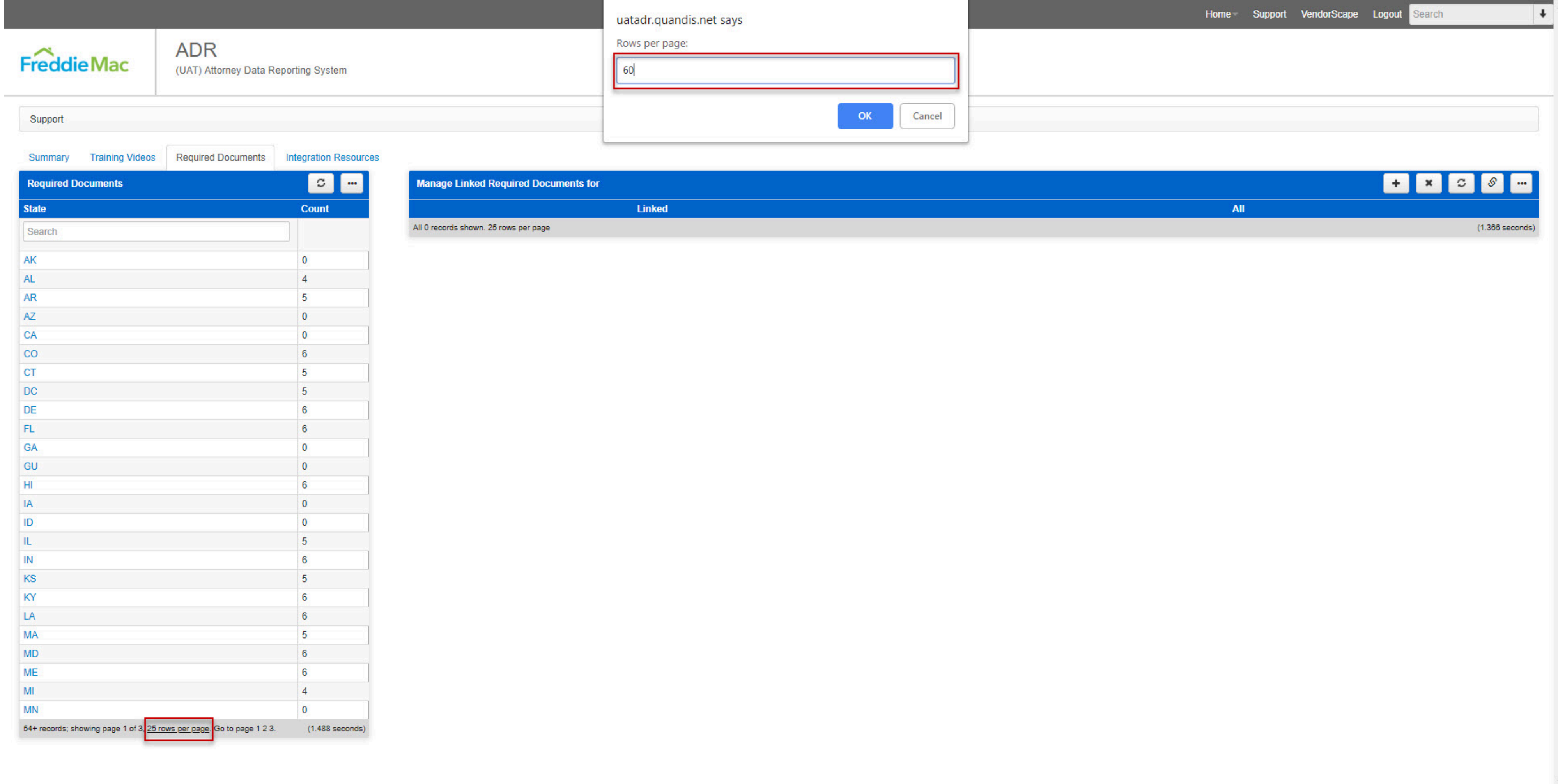
2. Click on the Required Documents tab.



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

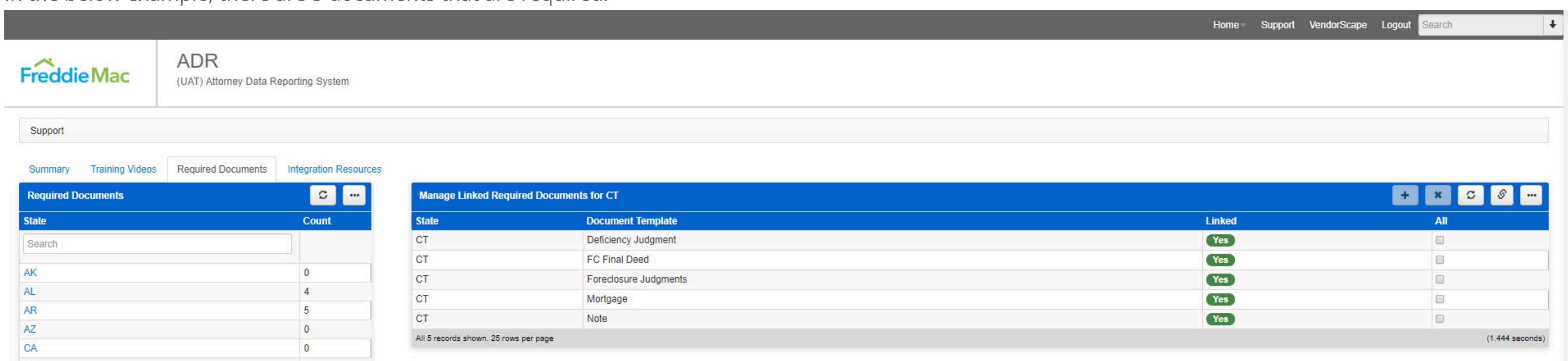


4. Expand list of states by selecting ’25 rows per page’ and updating the row count in the form.

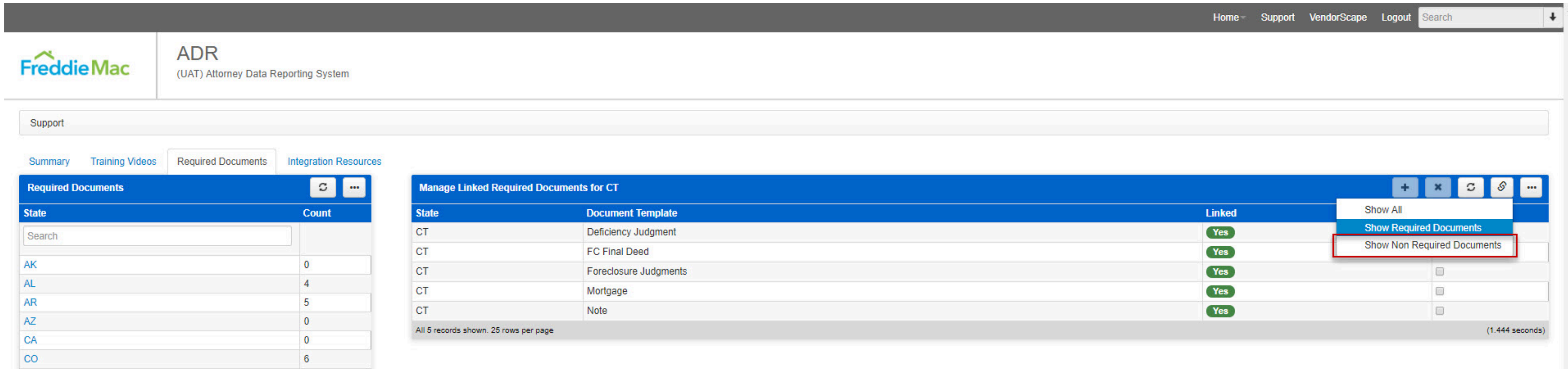


5. Once you have located your state, click on the state hyperlink. In this example, Connecticut was selected.

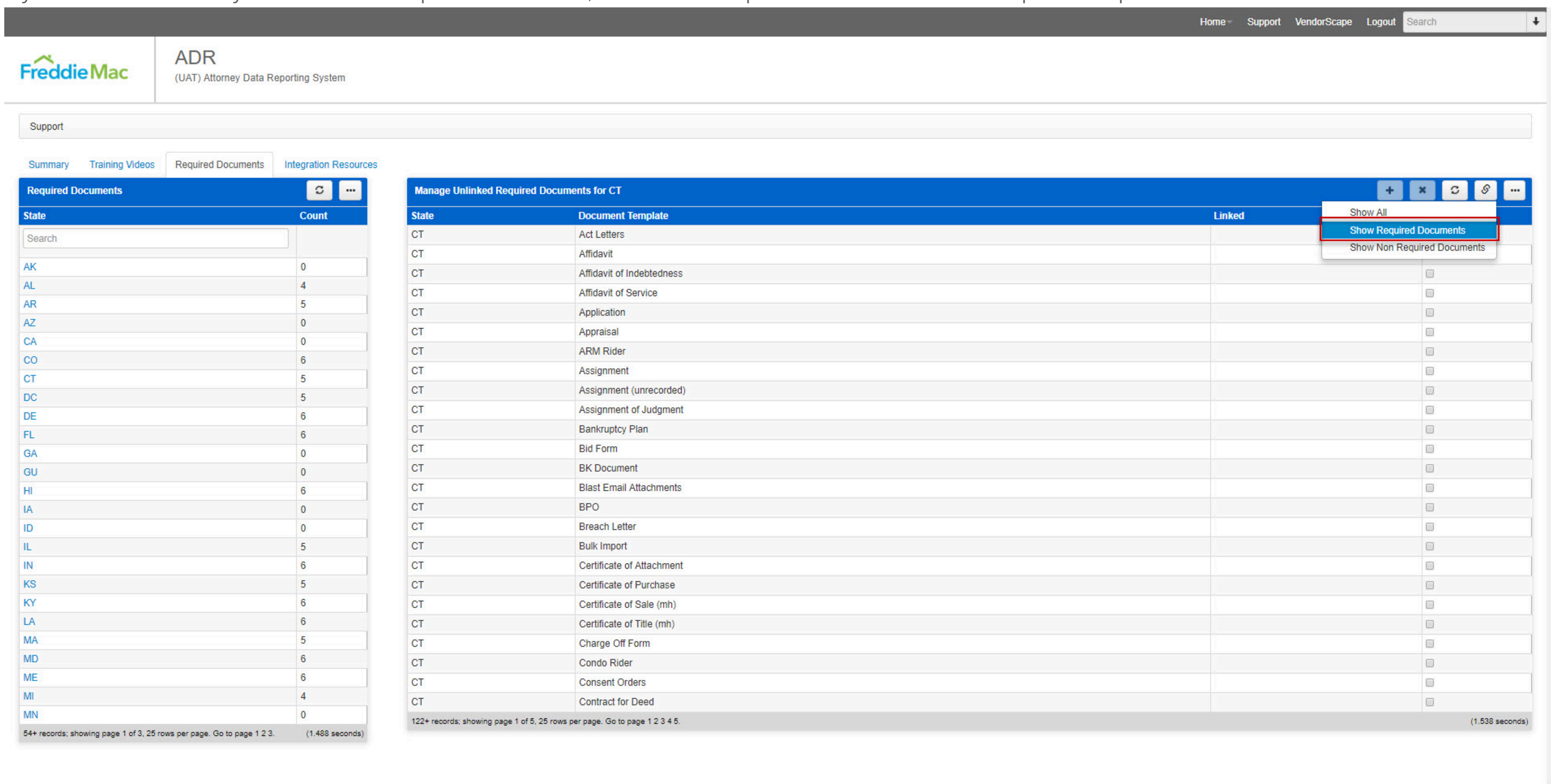
6. In the below example, there are 5 documents that are required.



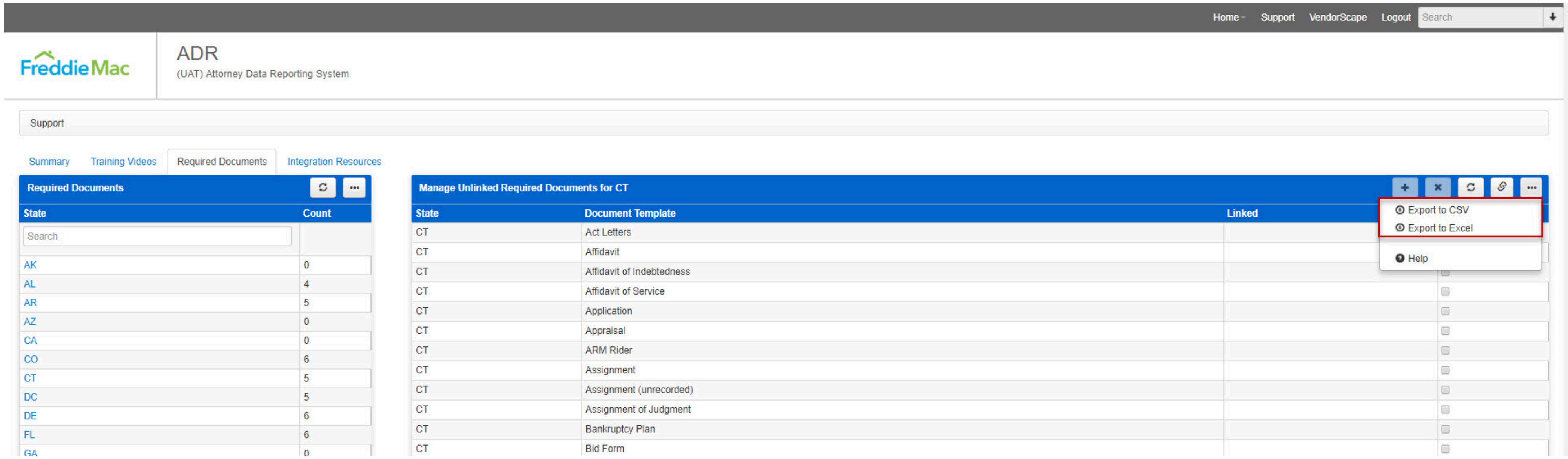
7. If you would like to view all possible documents that can be uploaded, but are not required, select Show Non Required documents from the 'Options' Drop-down.



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



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



10. The spreadsheet will be formatted as follows

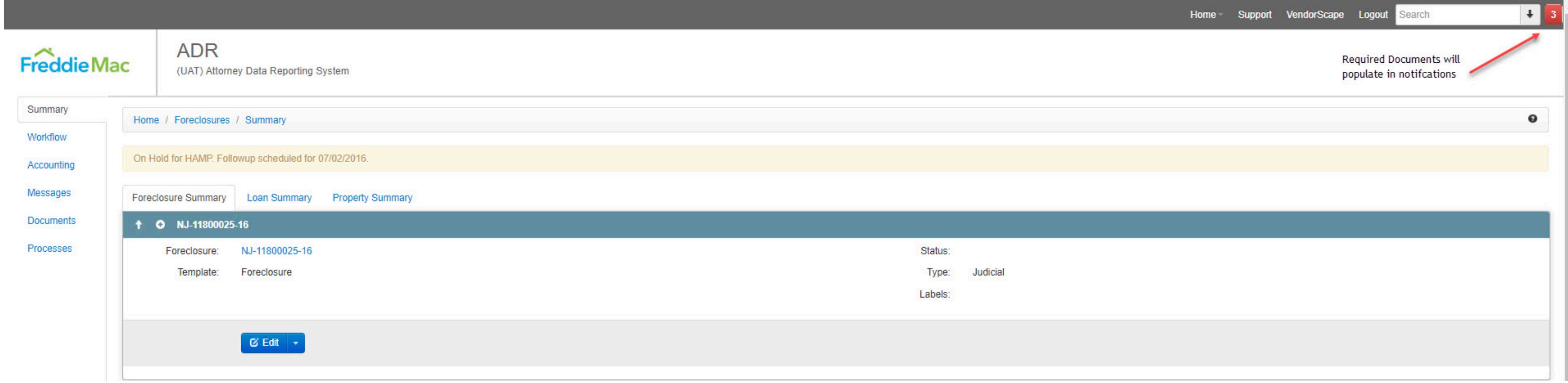
	A	B	C	D	E	F	G	H	I
1	PrimaryObjectID	PrimaryObject	PrimaryObjectLabel	LinkedObject	LinkedObjectID	LinkedObjectLabel	ObjectLinkID	RecordCount	
2	7	State	CT	AttachmentTemplate	1	Act Letters		122	
3	7	State	CT	AttachmentTemplate	2	Affidavit		122	
4	7	State	CT	AttachmentTemplate	130	Affidavit of Indebtedness		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:

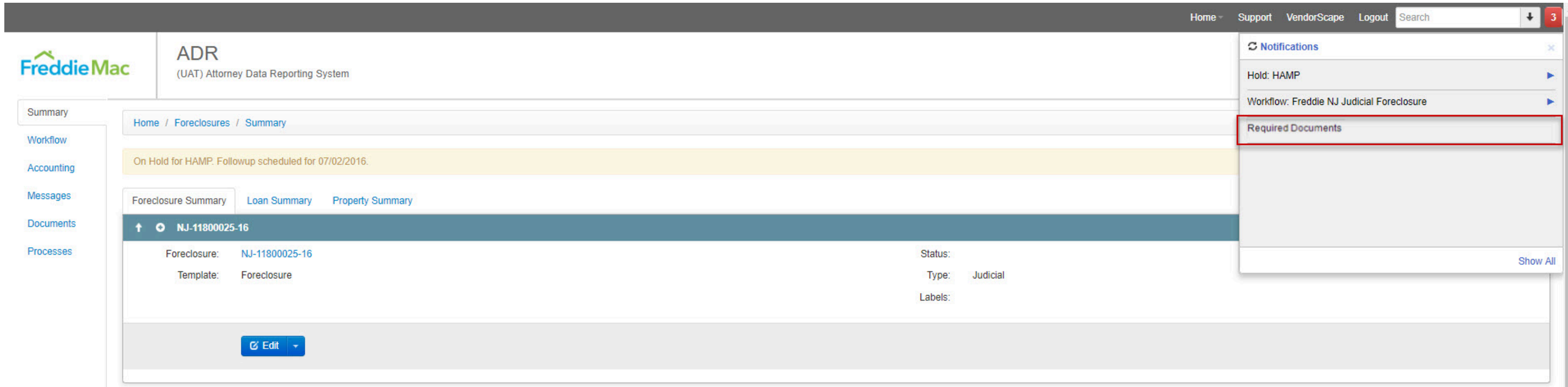
Required documents must be uploaded prior to closing process ×

8.3 PRIORITY MESSAGE

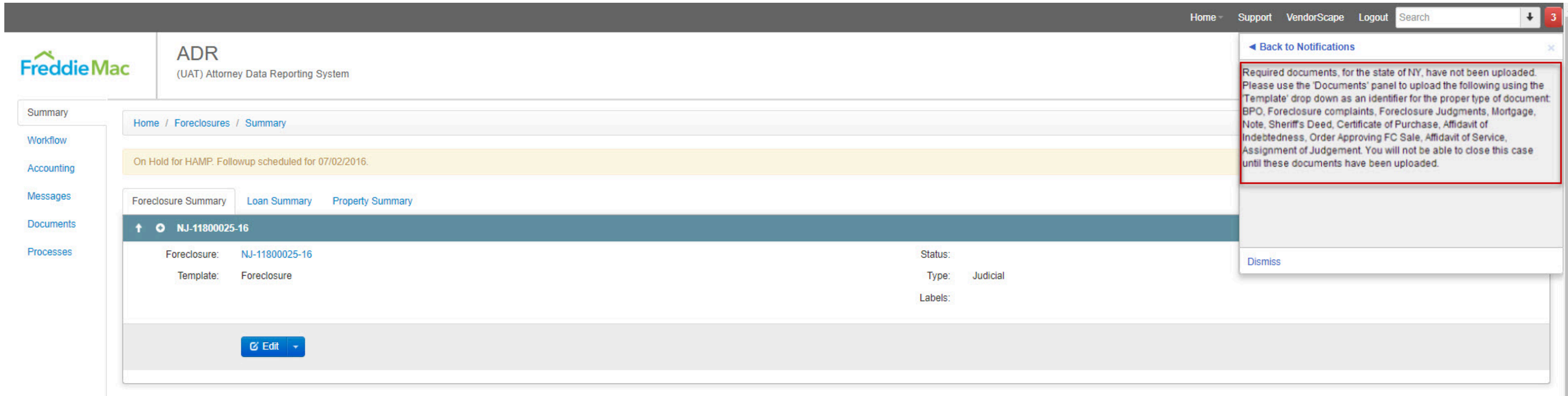
1. You can view the documents required on a per loan basis by reviewing the Priority Message.
2. Click on the Priority Message icon at the top right of the Foreclosure Summary page.



3. Click on Required Documents



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



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.

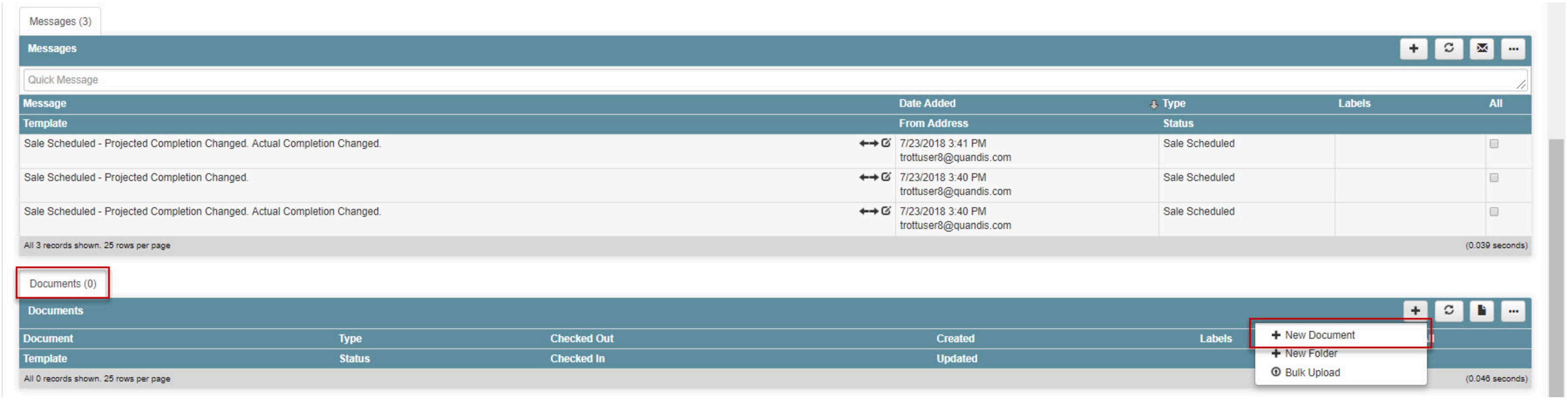
****IF YOU ARE USING IE10, CHROME OR ANY OTHER HTML5 COMPLIANT BROWERS, THE DOCUMENT SIZE IS NOT LIMITED****

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

8.4 UPLOADING A DOCUMENT

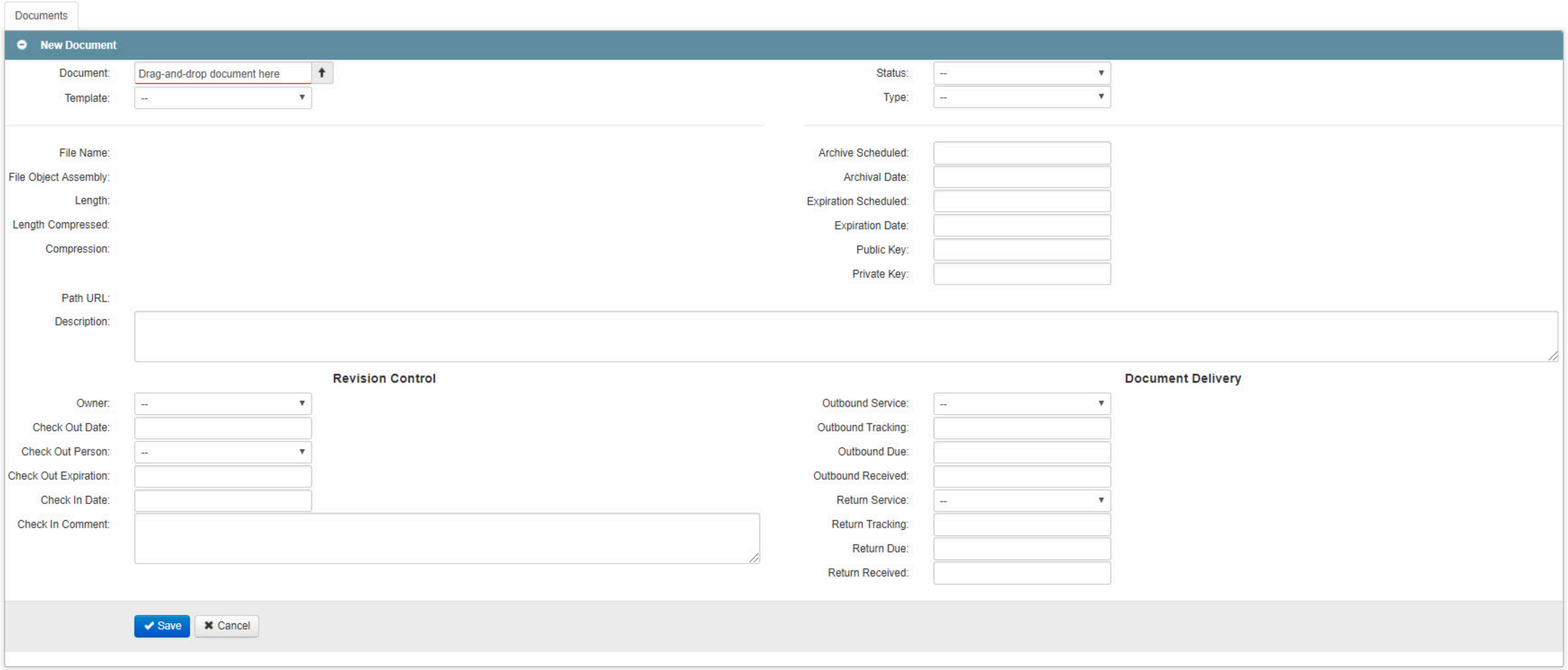
1. Click on the documents tab and then click on the "+" icon on the right, followed by "**+New Document**"

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.



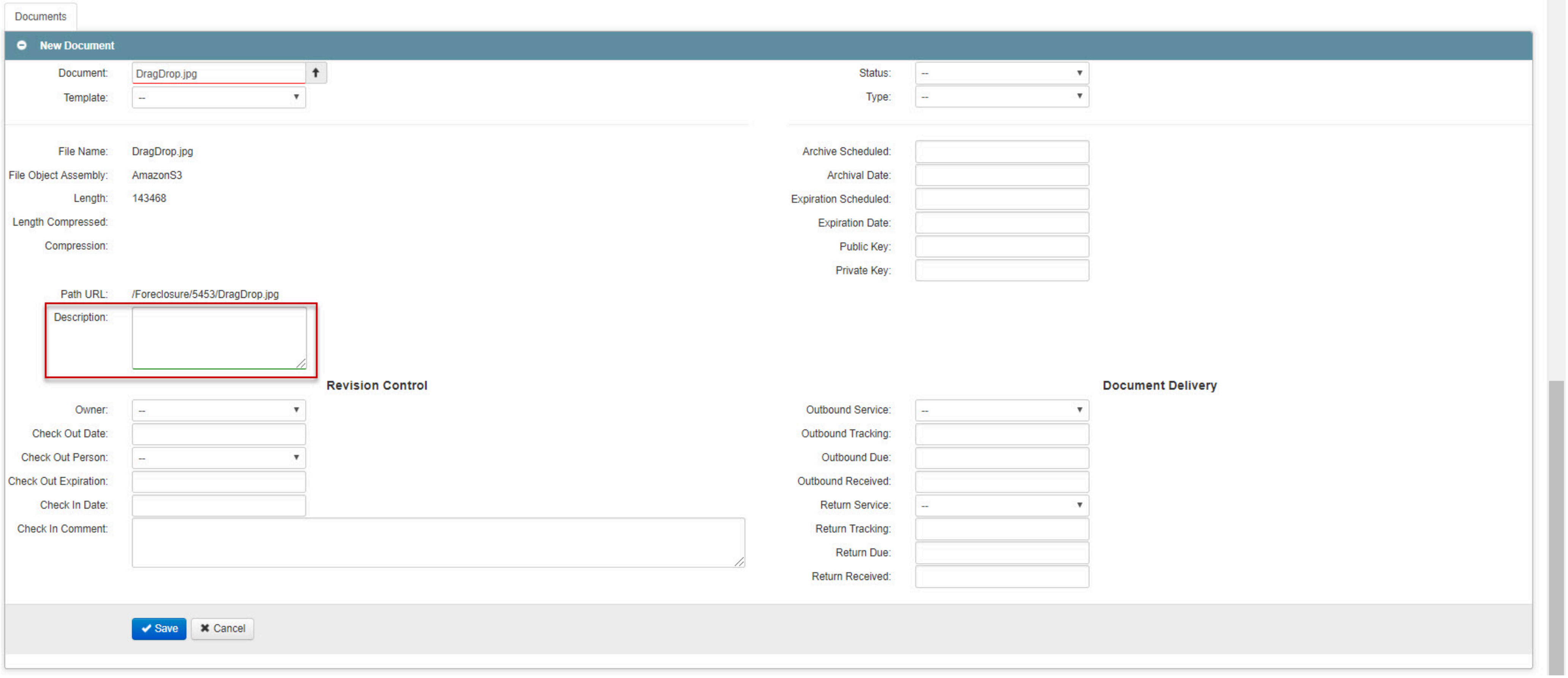
2. Click the arrow icon or Drag-and-Drop to upload your document. Be sure to select the Template that matches what is being asked of the Required Documents section, as the Template is most important in letting the system know that you have uploaded what is needed.

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



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.



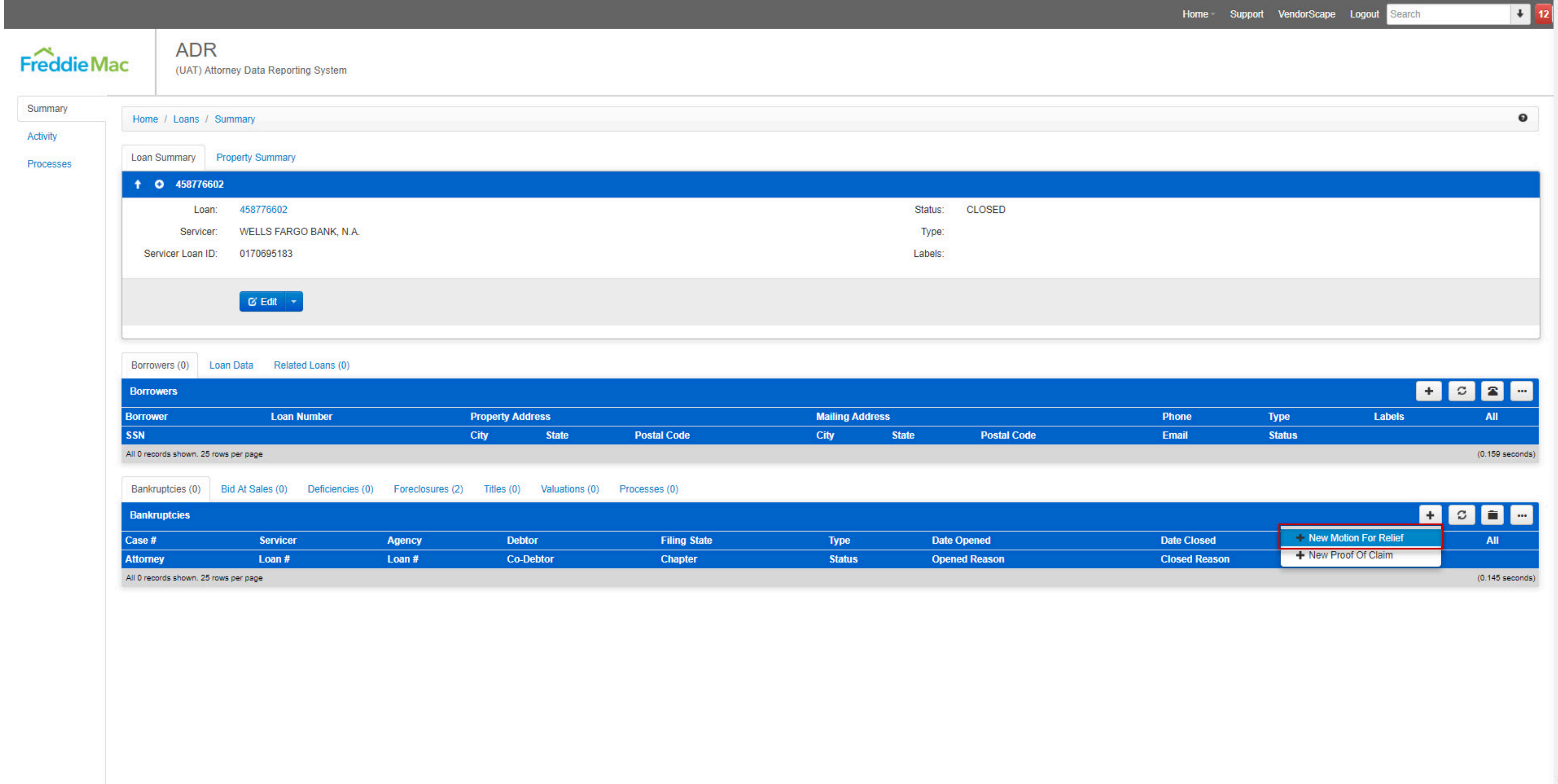
9 OPENING A BANKRUPTCY

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.

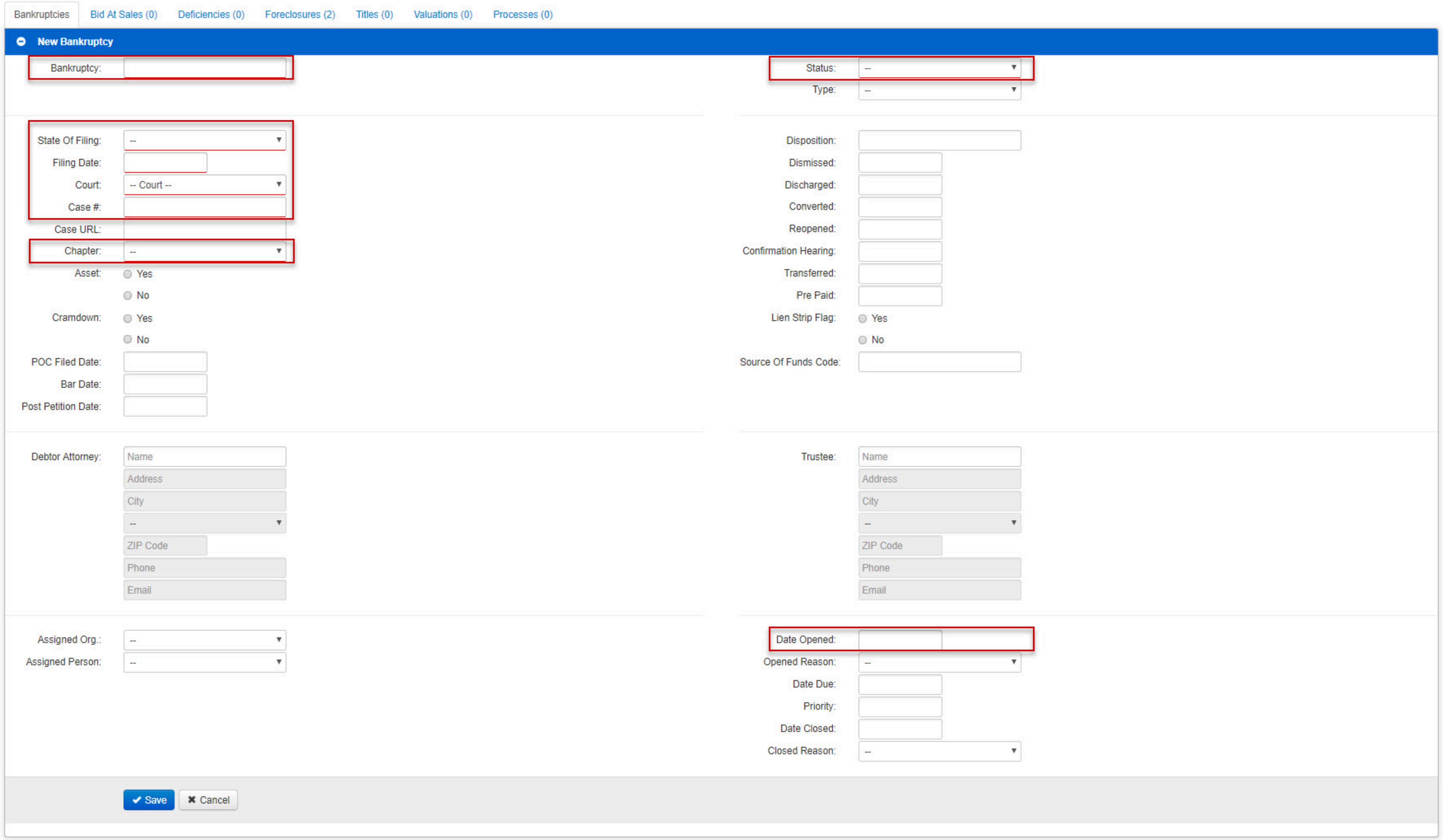
9.1 OPENING A MOTION FOR RELIEF (MRF) AND A PROOF OF CLAIM

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.



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

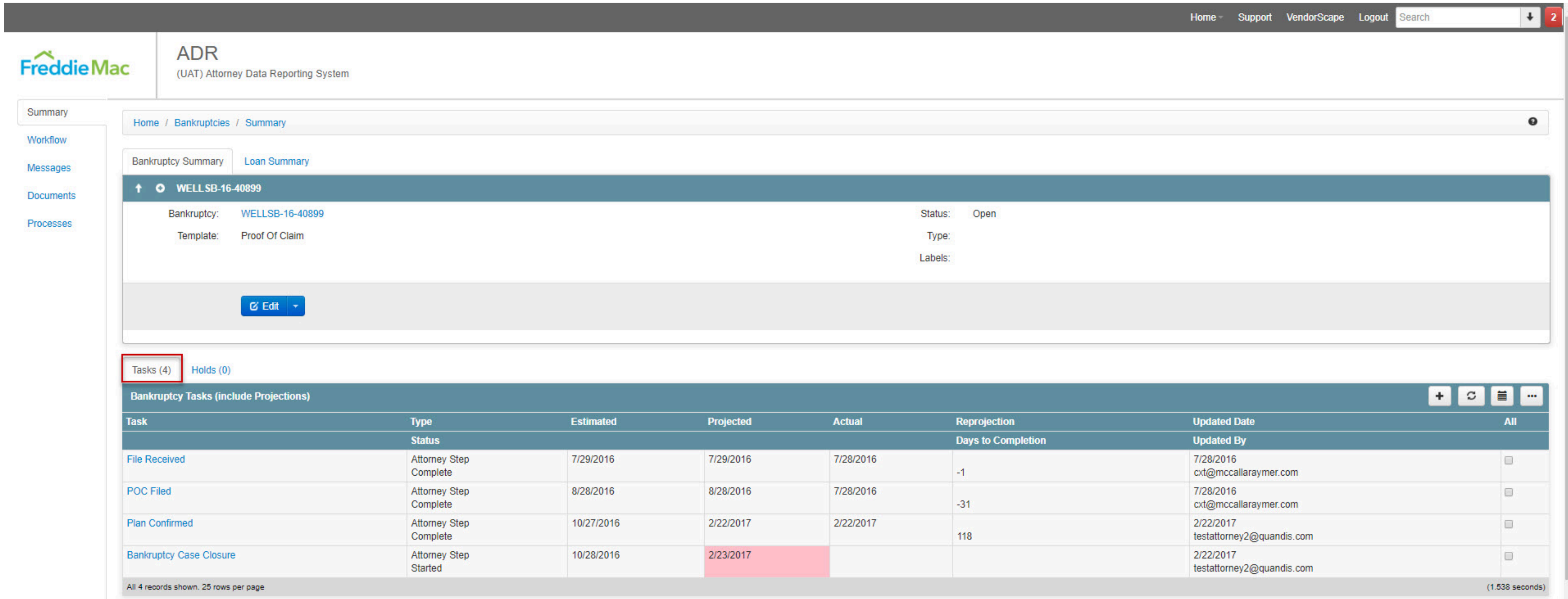


These fields listed above are required, however, please be sure to fill out any additional section that may apply, or if you have that information that can be entered such as the Atty Case # and your Firm Name, both of which can be found on the top right hand side.

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

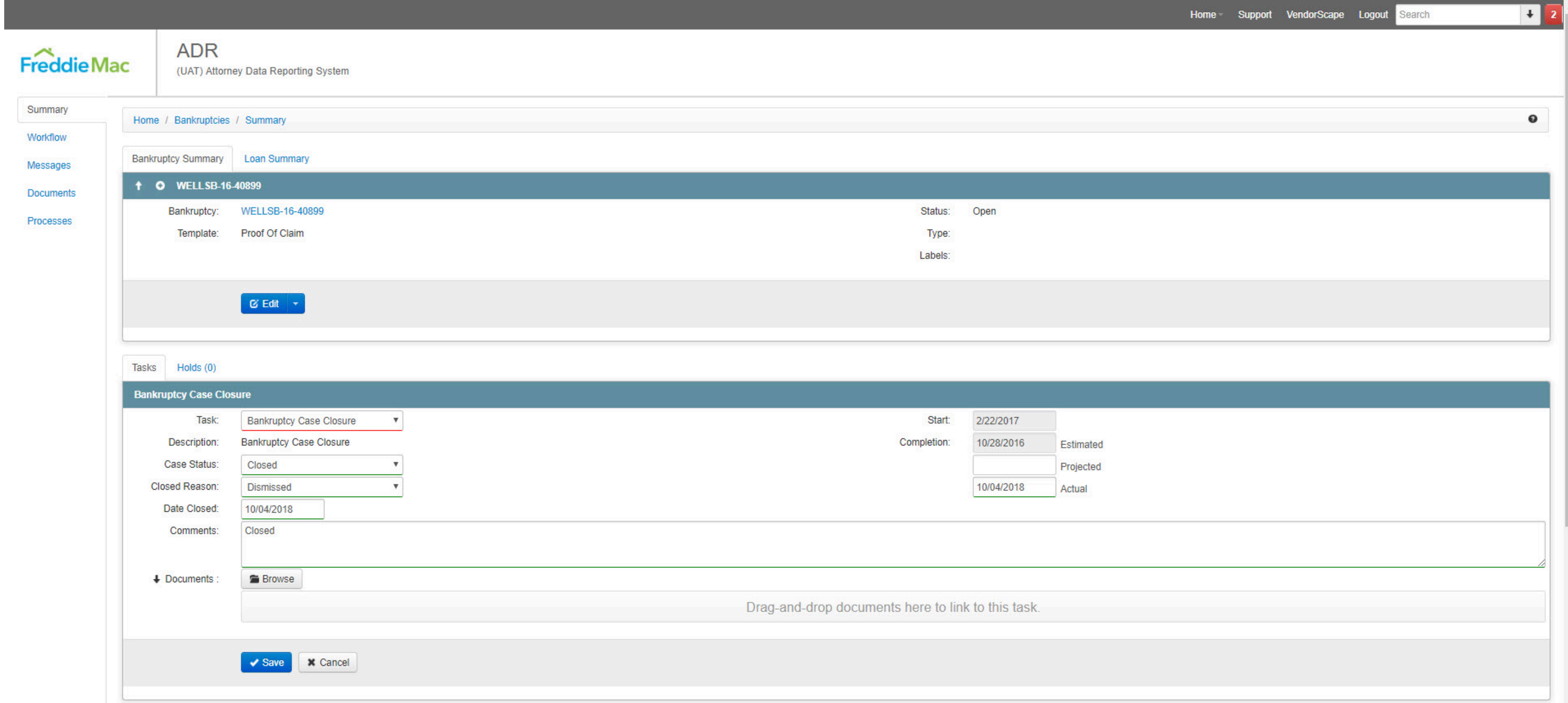
The due date for the first task is based on the start date entered when the bankruptcy was opened. If an error was made in entering the start date, you will need to close the bankruptcy and open a new one. Please refer to the Closing the Bankruptcy [#closing-a-bankruptcy] section for instructions on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



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.



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

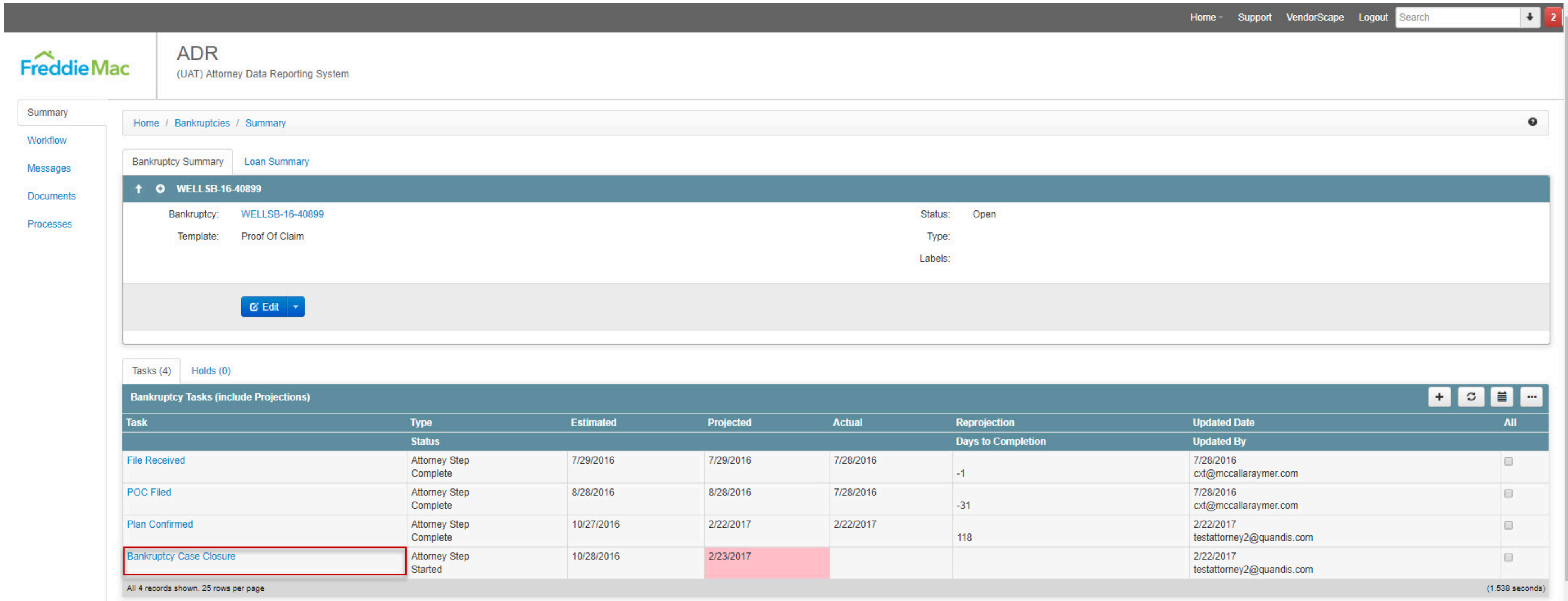
1. By default, all tasks will be visible to you when working on a bankruptcy file.

10.2 REPROJECTING A TASK

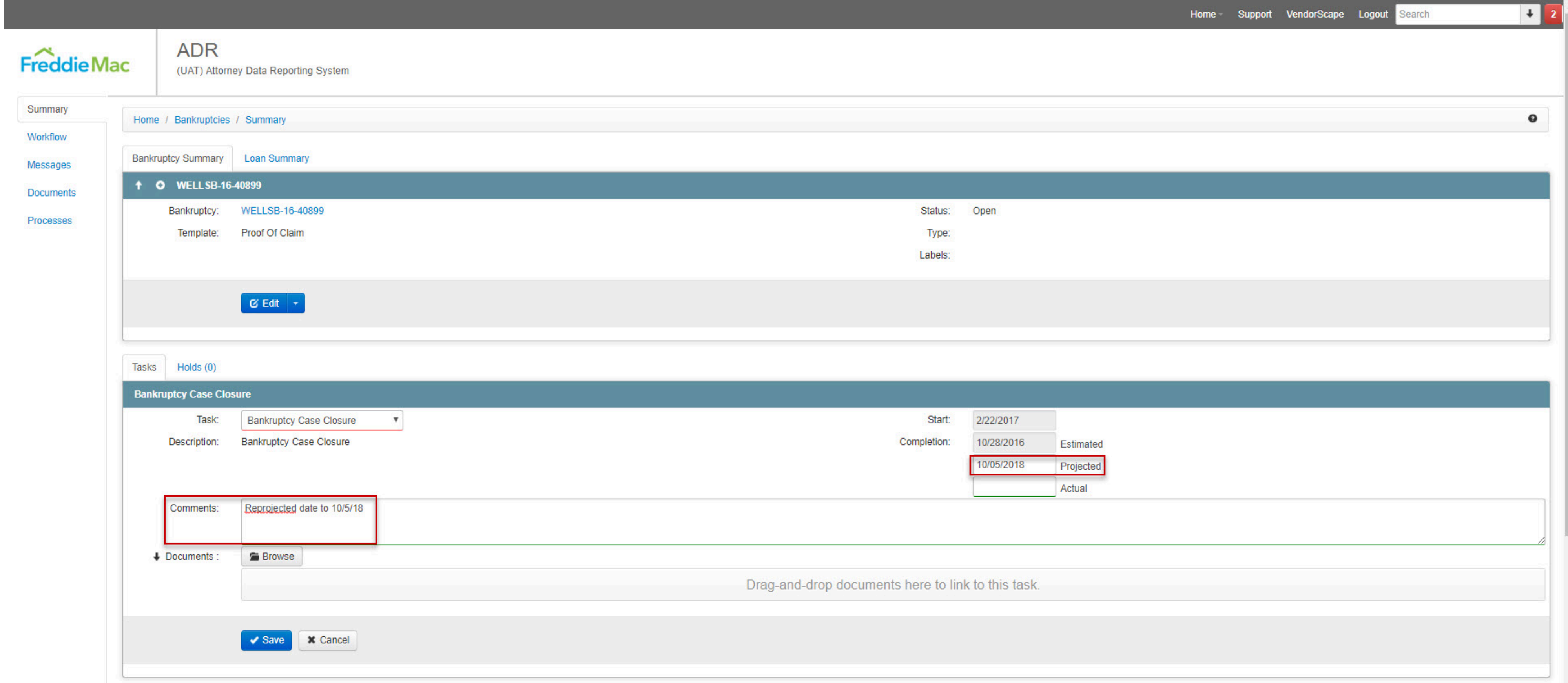
Tasks cannot be reprojected to a past date. For example, the current date is October 1, 2018; the Projected Date must be greater than October 1, 2018. If you enter a date that is less than the current date, you will receive the following error message:

Tasks cannot be reprojected to a past date

1. Click on task name hyperlink

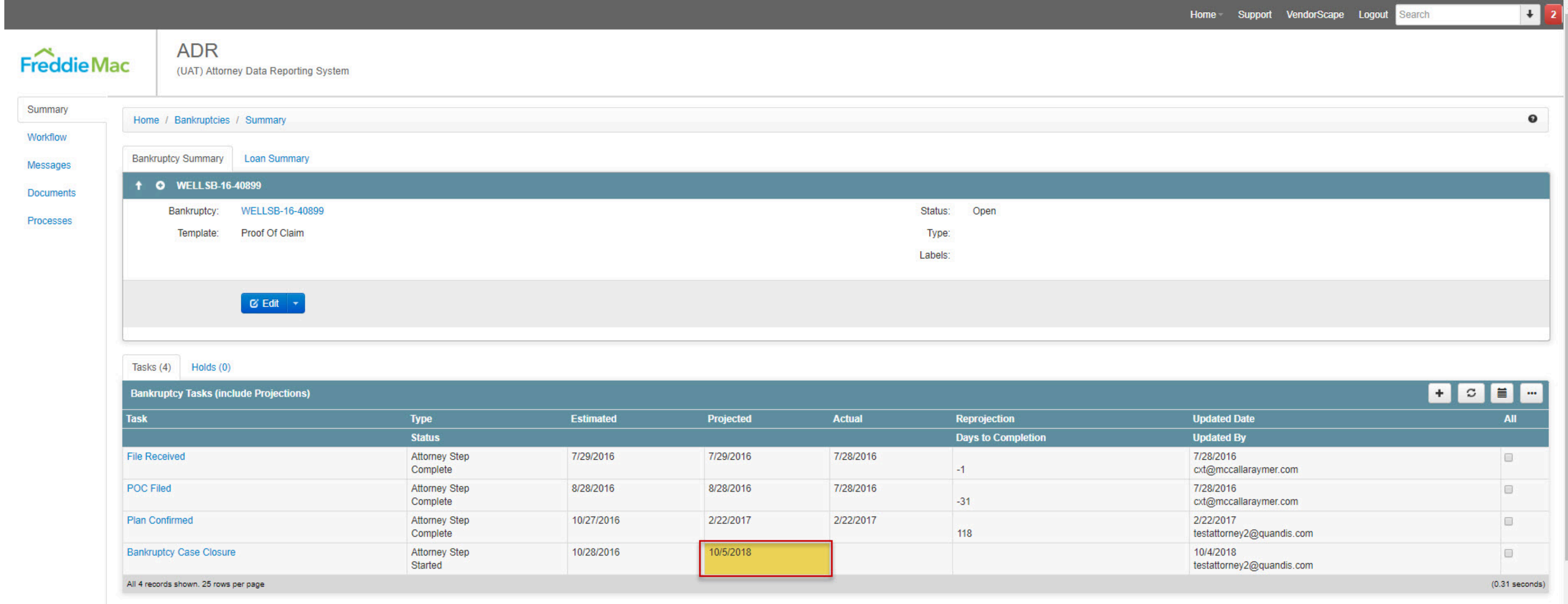


2. Enter future date in the Projected Date field and commentary as necessary



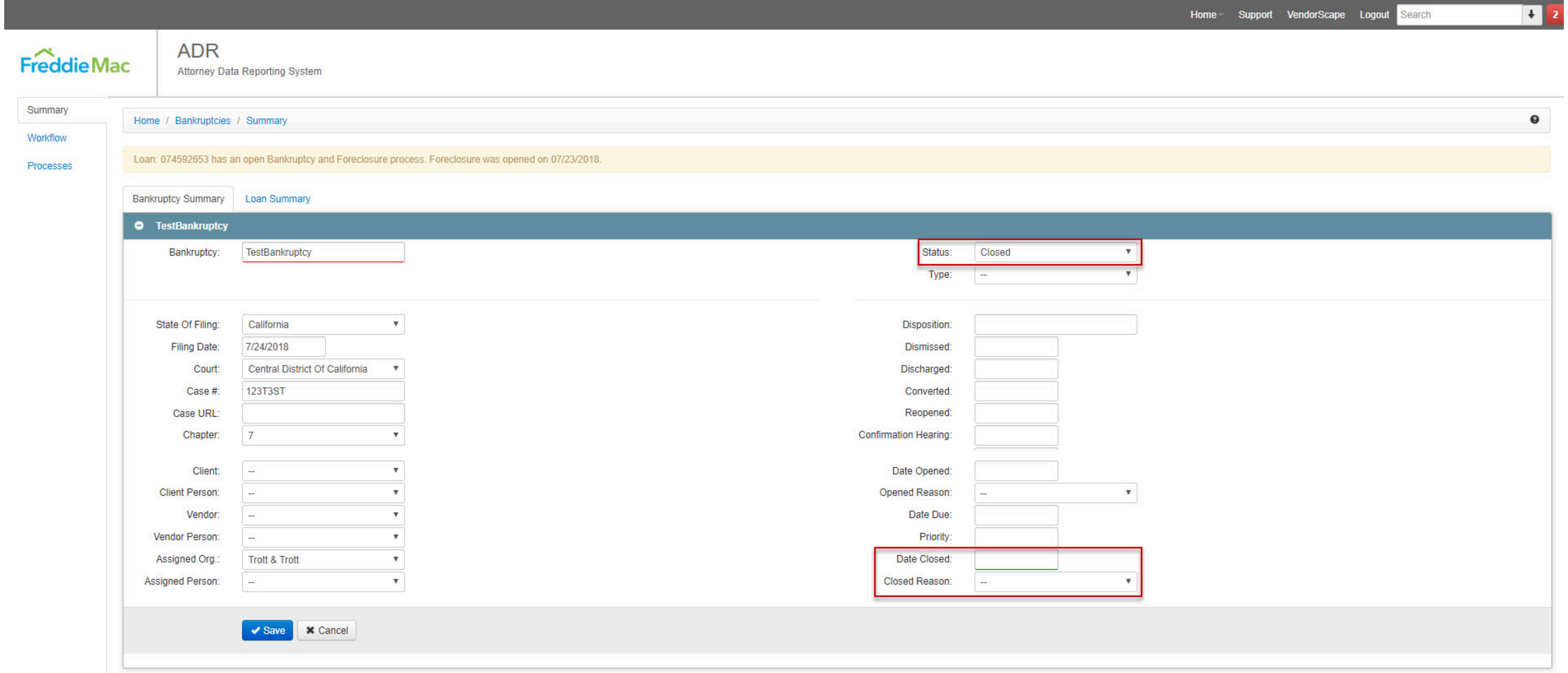
3. Click Save.

4. The projected date has been updated



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).



12 TITLE HOME

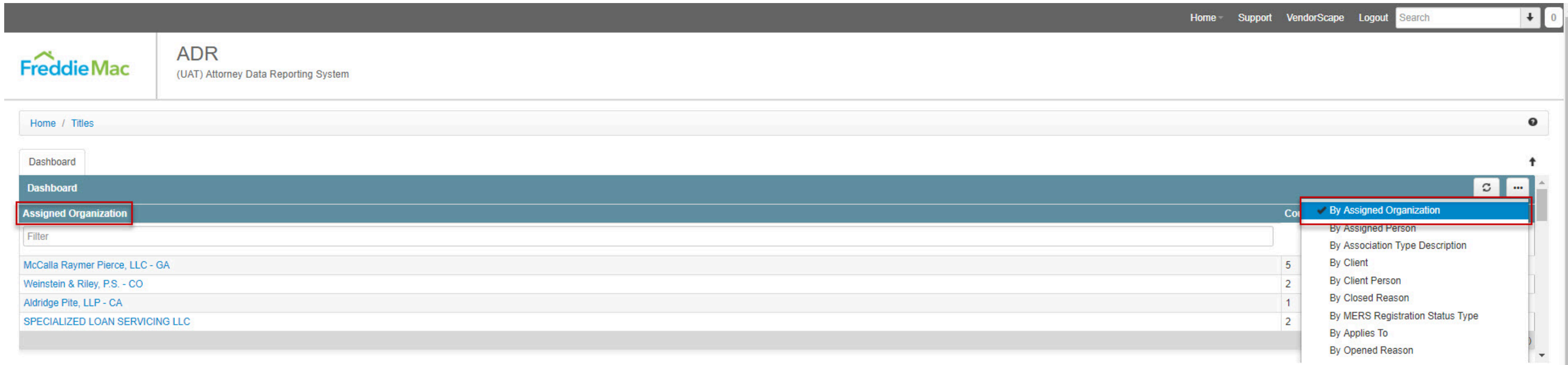
Attorneys can navigate to Home > Titles to perform the following functions:

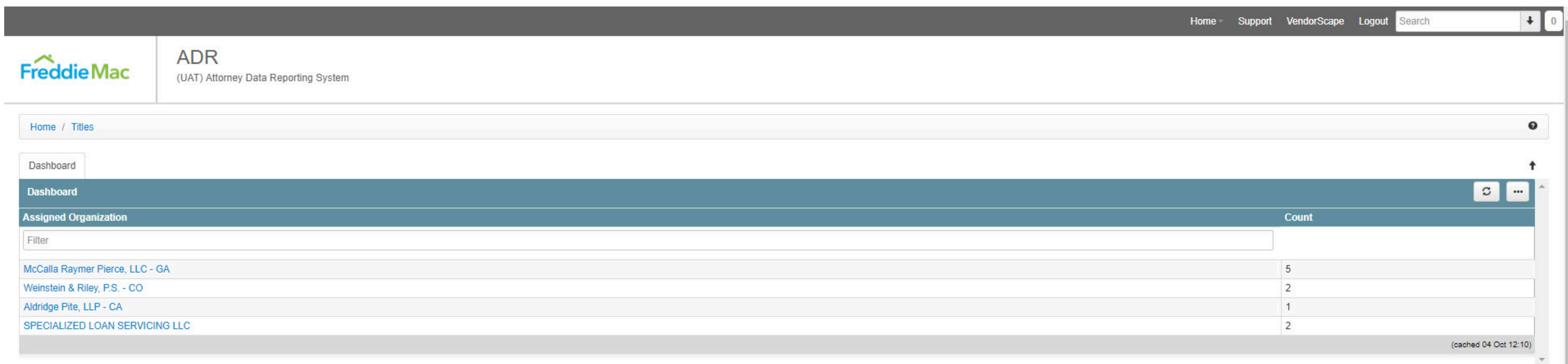
1. Title Dashboard View [#dashboard]
2. Title List View [#list]
3. Title Order Cancellation [#cancel]
4. Title Summary [#summary]
5. Title Product Retrieval [#product]
6. Title Update Requests [#titleupdate]
7. Title Order Inquiries [#titleinquiries]

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

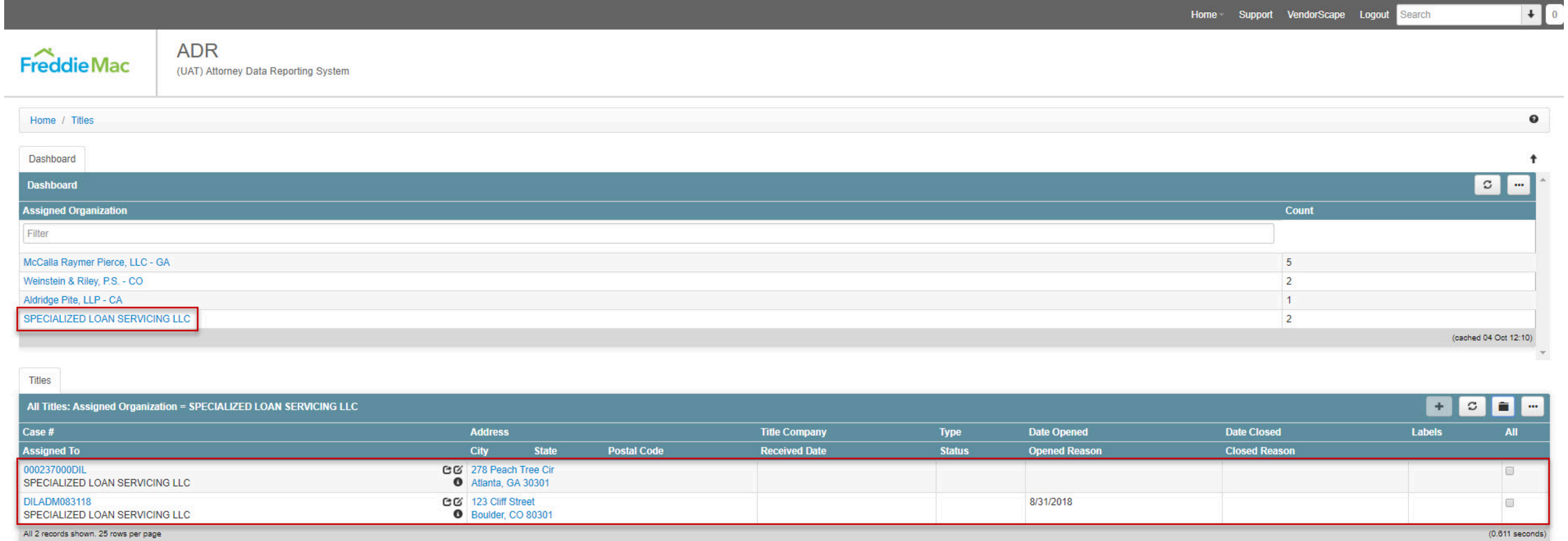
   Note: Select the ellipsis symbol on the right of the dashboard to filter criteria; In this example the Dashboard is filtered by "Assigned Organization"





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).

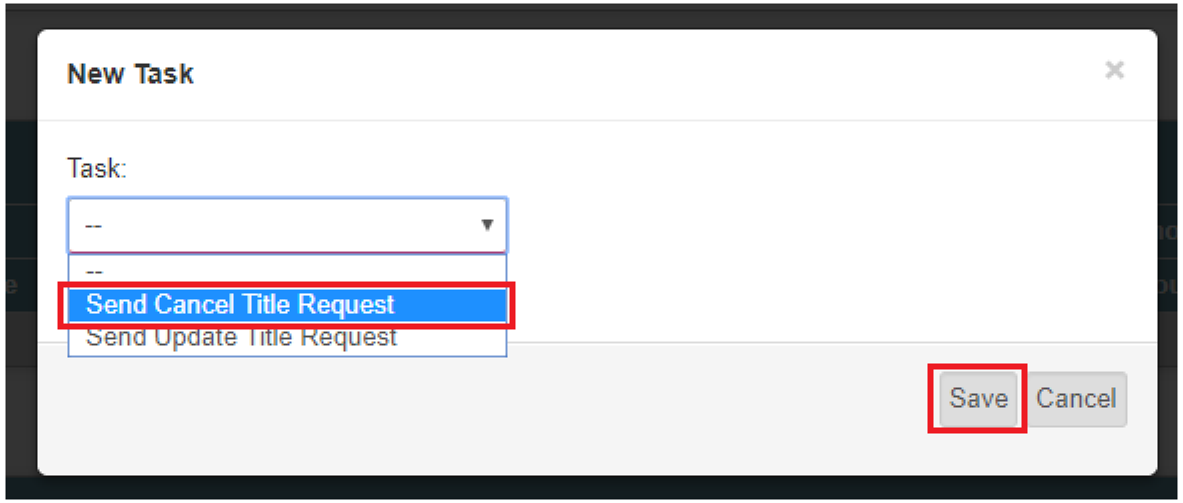


12.3 TITLE ORDER CANCELLATION

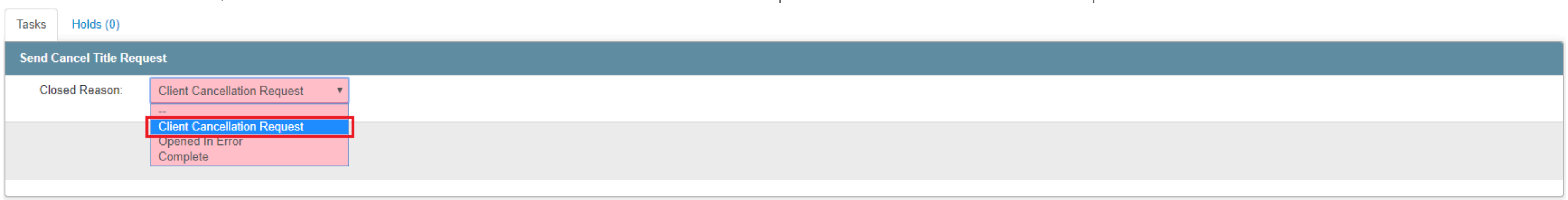
Servicer can cancel a title order as outlined below:

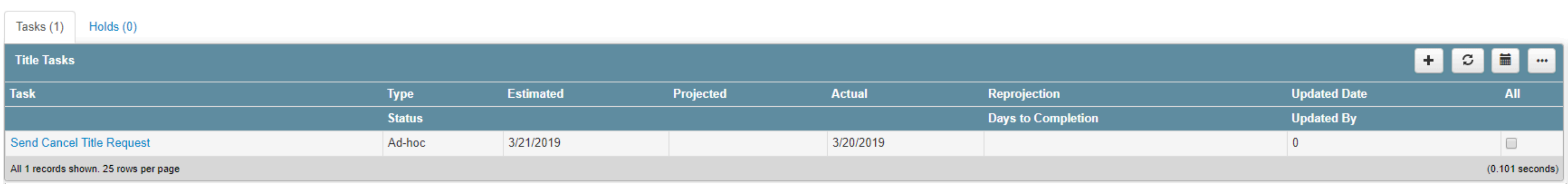
1. Navigate to the **Summary Page** for the **Title** that needs to be cancelled
2. Scroll to the **Tasks** panel and select "+ New Task"

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

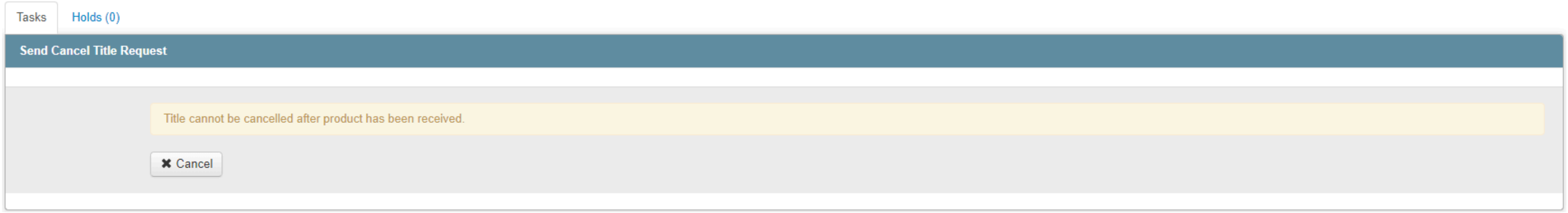


4. You will be presented with a **Task Edit** screen, where you will need to choose a Closed Reason, and click "Save". If it is determined the Cancellation request should not be sent at this time, click "Cancel". The Task can be accessed at a later time to proceed with the Cancellation request.





*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".



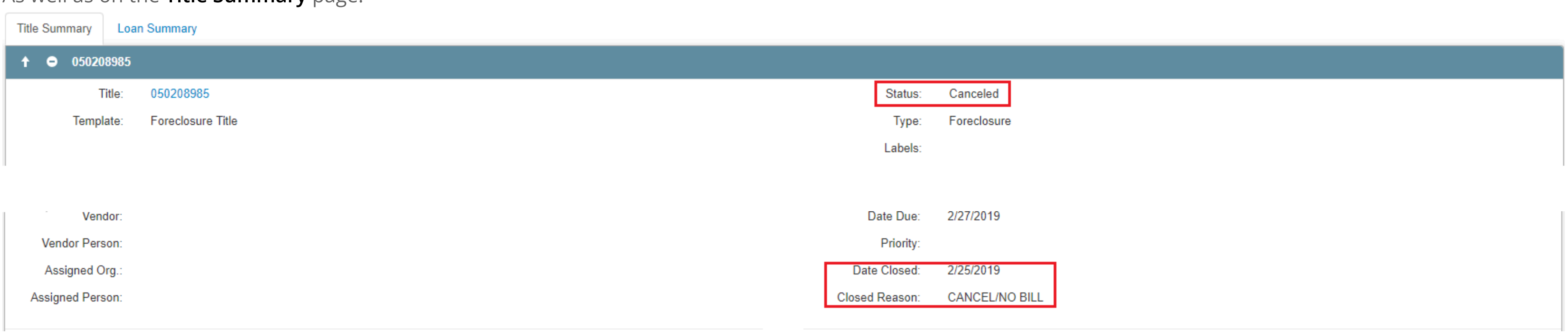
5. Once saved, the Cancellation request will be sent to the Title Vendor, where a decision will be made to allow the Cancellation, and whether or not a charge will be assessed. Please contact the Title Vendors directly for billing questions and to obtain their allowable cancellation time frames.

12.3.1 VERIFY CANCELLATION OF TITLE ORDER

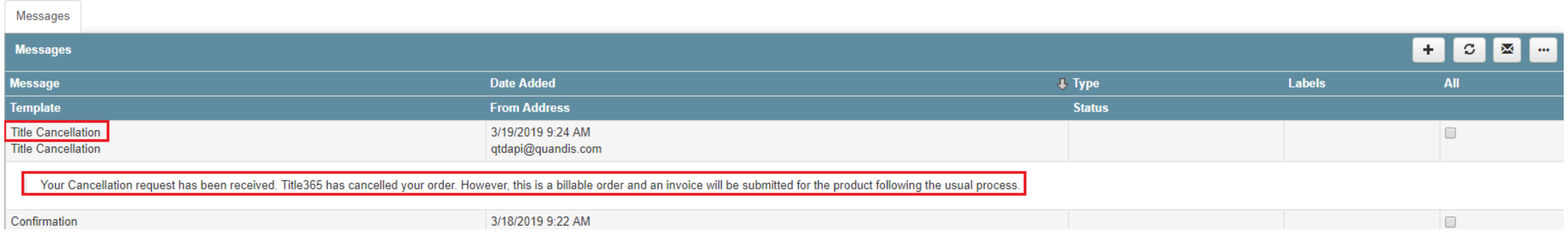
Cancellations may take up to a day for the Title Vendors to process. Please contact the Title Vendor directly for an update if a response is not received within 24 hours of the Request being sent. Servicers can verify the cancellation of the Title Order using the following steps:

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:

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



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.



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 s to CSV or Excel

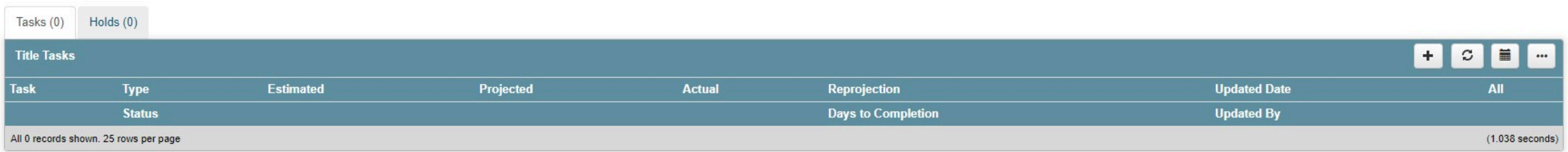
3. View Workflow Panel and perform the following functions for Tasks and Holds

: Add a new Task/Hold

: Refresh Task/Hold panel

: View Task/Hold by various filters

: Export details of Task/Hold to CSV or Excel



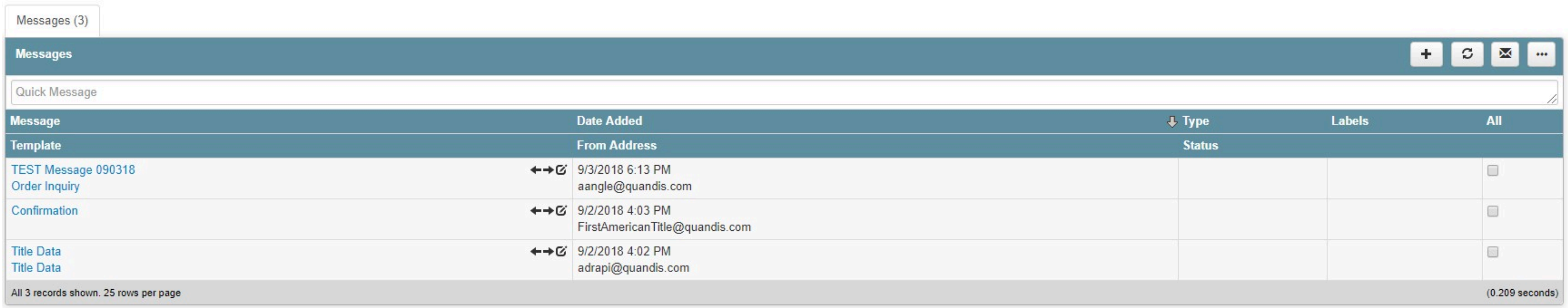
4. View Messages Panel and perform the following functions

: Add New Message

: Refresh Message panel

: View Messages by various filters

: Export details of Messages to CSV or Excel



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

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		
FC090318SL Foreclosure	 Open	 Tiffany & Bosco, P.A. - CA		9/3/2018		
000242594 Deed In Lieu						

All 3 records shown. 25 rows per page (0.41 seconds)

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		
GRADE SHEET WITH TITLE REPORT Title Product	GSTR		9/4/2018 9:24 AM by qtdapi 9/4/2018 9:24 AM by qtdapi		

All 2 records shown. 25 rows per page (0.29 seconds)

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:

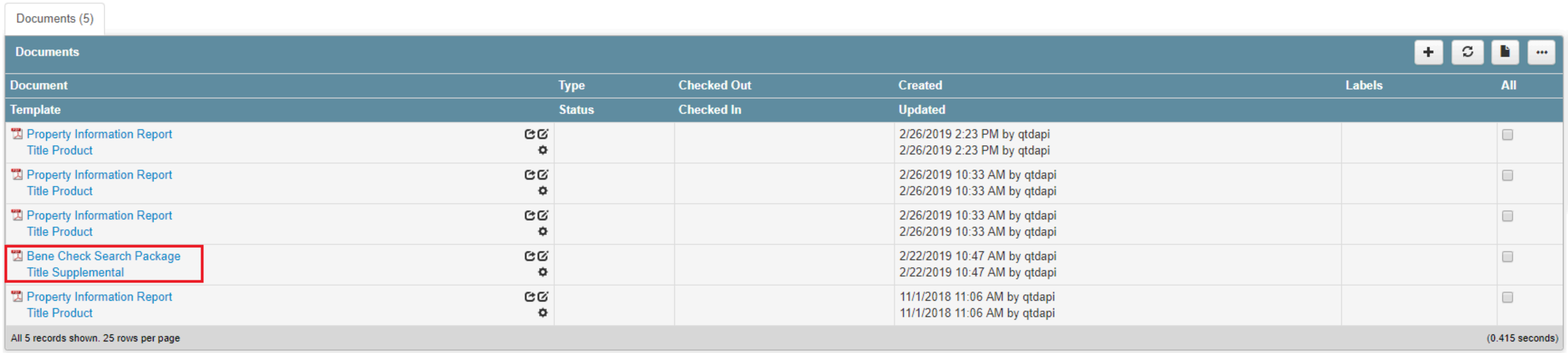
Contact Methods (1)

Contact Methods

Contact Method	Primary Method	Start Date	Verified Source	All
Description	**Status**	**End Date**	**Verified Date**	
primarycontact@firm.com Email	True			

All 1 records shown. 25 rows per page (0.112 seconds)

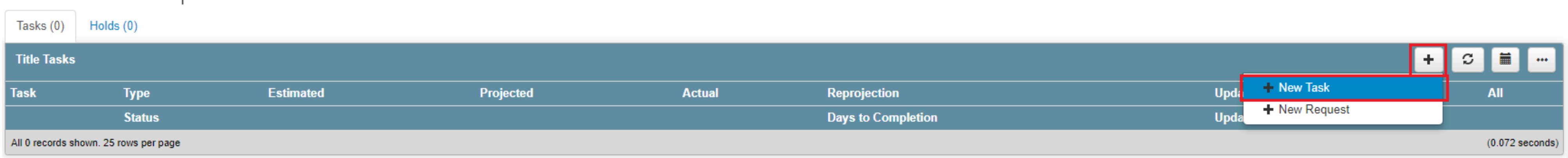
Otherwise, it will be sent to all active Security Administrators associated with your firm. The Bene-Check document can be found in the same location as the Product documents, and will be appropriately labeled (labeling may vary between Title Vendors).



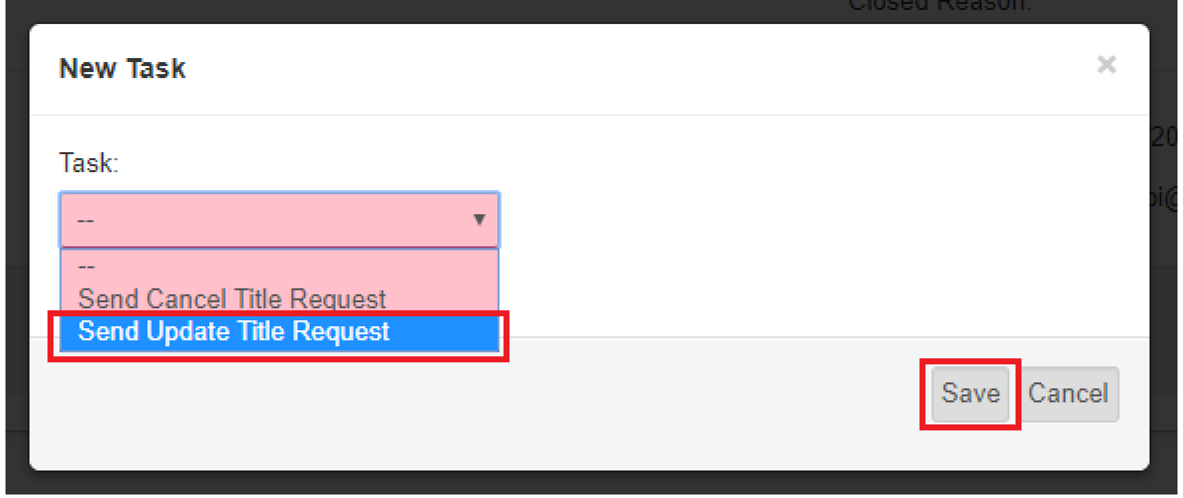
12.6 TITLE UPDATE REQUESTS

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

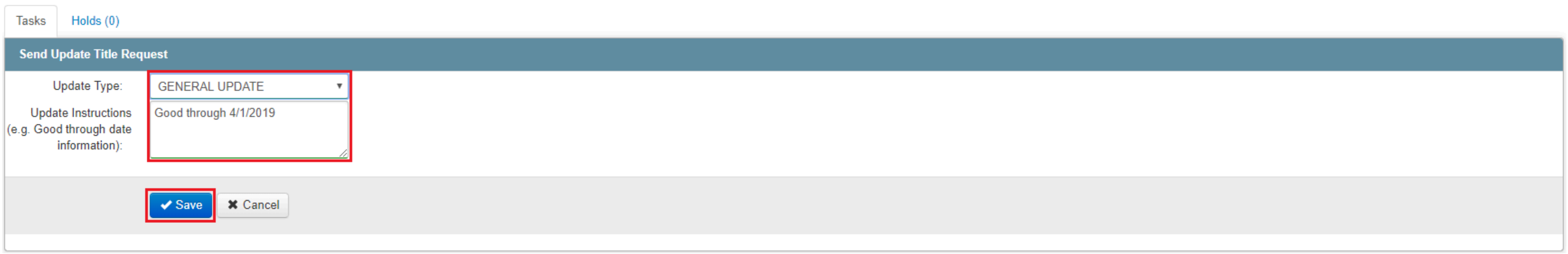
1. Navigate to the **Summary Page** for the **Title** requiring an update
2. Scroll to the **Tasks** panel and select “+ New Task”

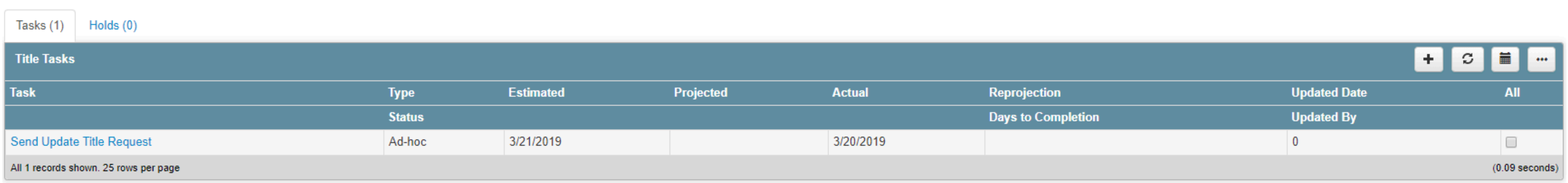


3. Within the popup that is presented, select “Send Update Title Request” from the Task dropdown menu and click “Save”

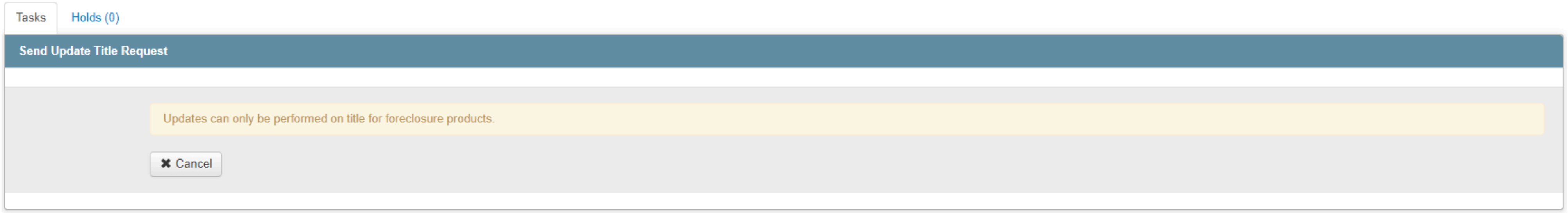


4. Select an Update Type from the dropdown menu, then enter the Instructions for this Update, including the Good Through Date, if applicable, then click "Save".
   *Note: the Update Type list will vary between Trustee Sale Guarantee (TSG) and non-TSG states





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.

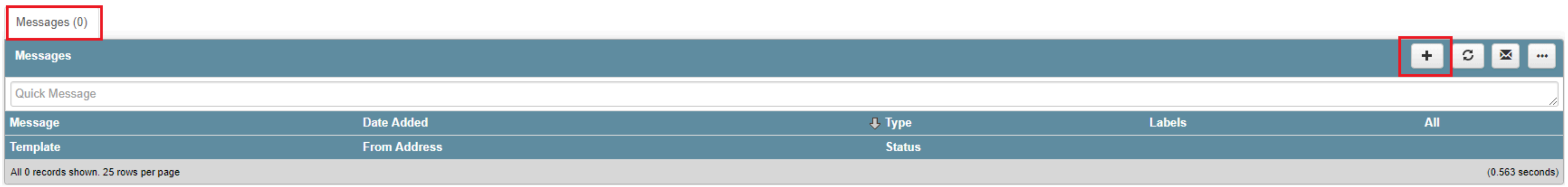


*Note: The length of time for delivery, and the Product produced for Title Updates will vary between each Vendor. Please contact the Title Vendors using the Messages Panel (see section 12.7) for delivery delay inquiries and Product questions.

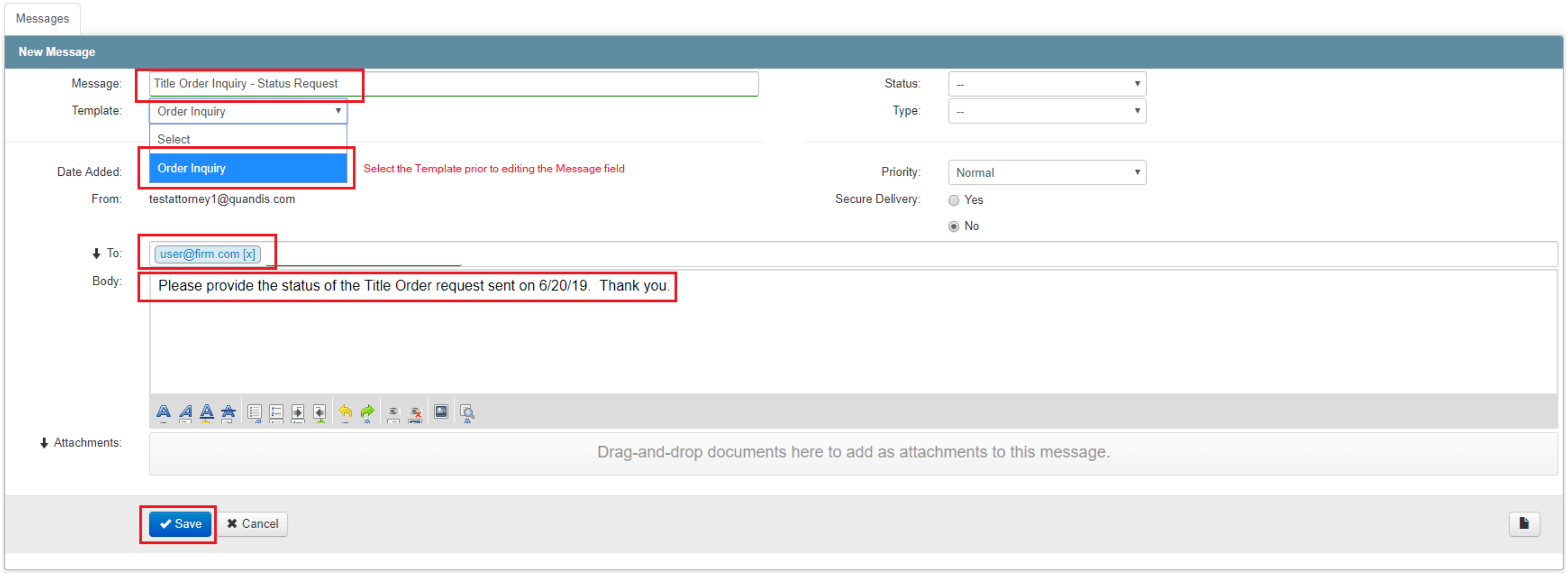
12.7 TITLE ORDER INQUIRIES

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.

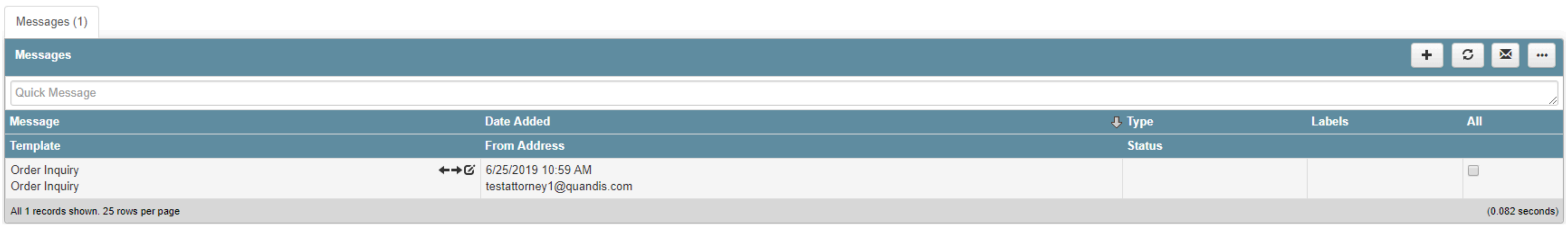
1. Locate the Messages Panel on the Title Order and click the “+” button to add a new message.



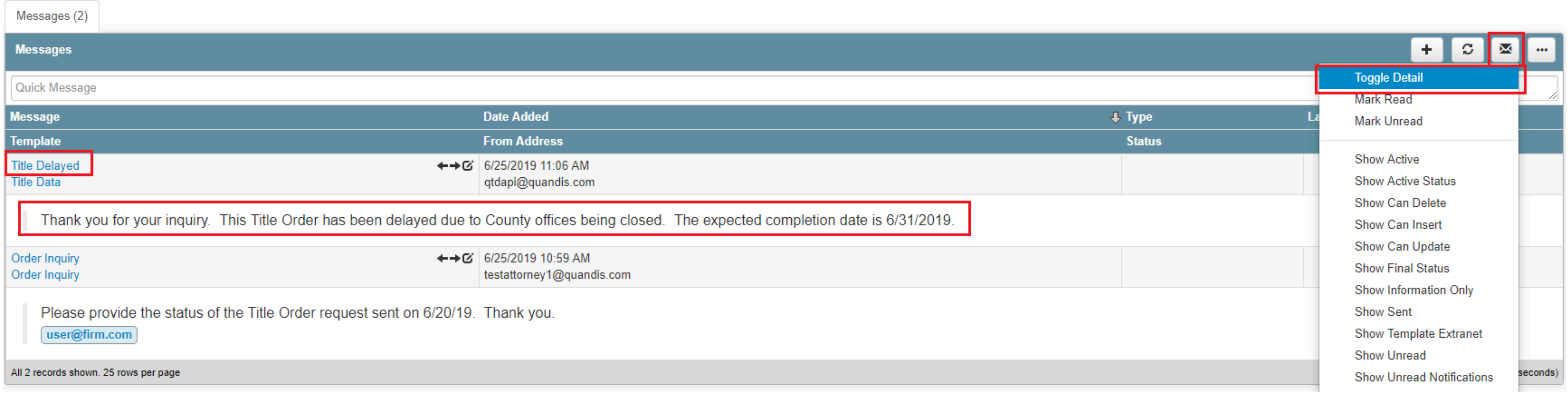
2. Select “Order Inquiry” from the Template dropdown, then enter/edit the Subject in the Message field. Enter the information you want sent to the Title Vendor in the Body field. You can opt to send the message as an email by entering recipient email addresses in the To field. Once all information is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



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



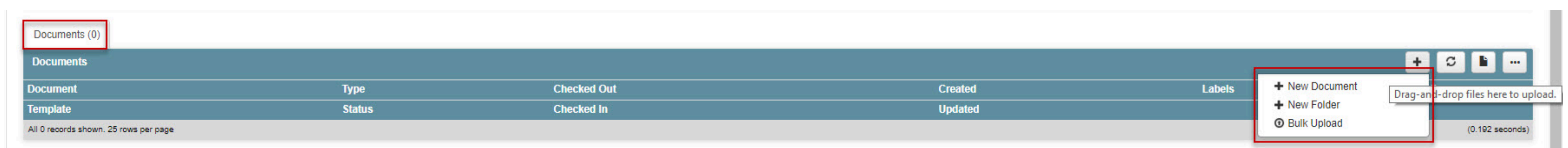
4. Responses sent by the Vendor will appear in the Messages Panel. The full Message can be reviewed by clicking “Toggle Detail” from the envelope icon options menu.



13 DOCUMENTS

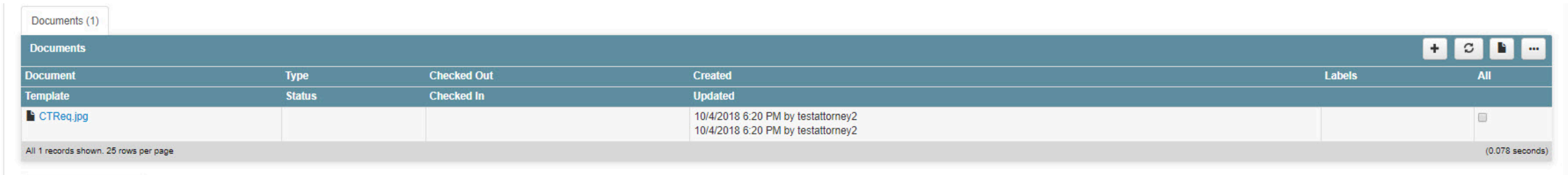
This section outlines how to upload documents

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



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

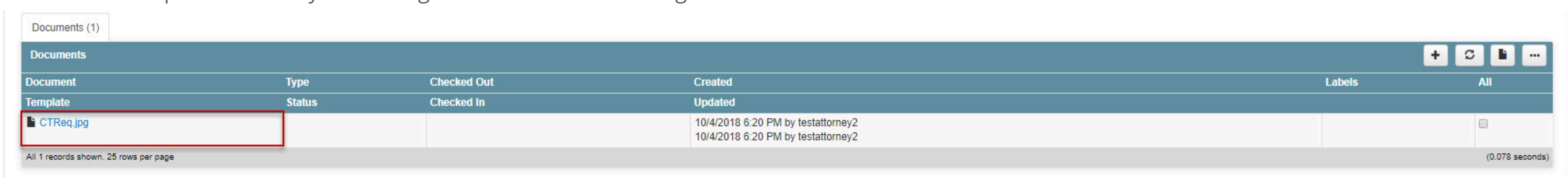
- User Upload
- Created Date
- Updated Date



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

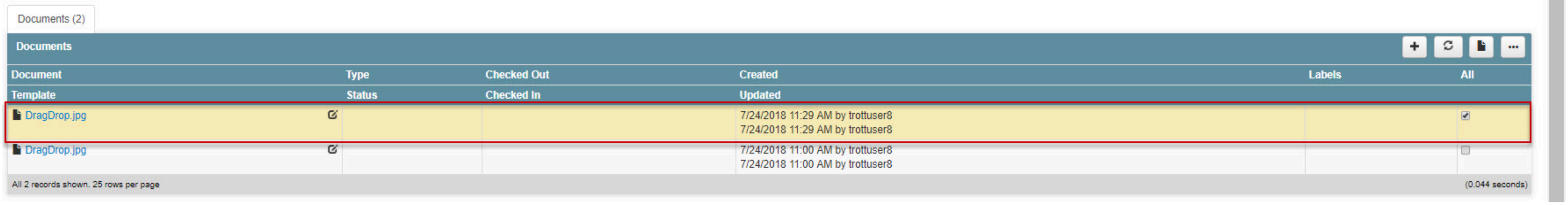
13.1 VIEWING A DOCUMENT

1. Click on the document name hyperlink.
   Note: The document will open based on your settings for the document being viewed.

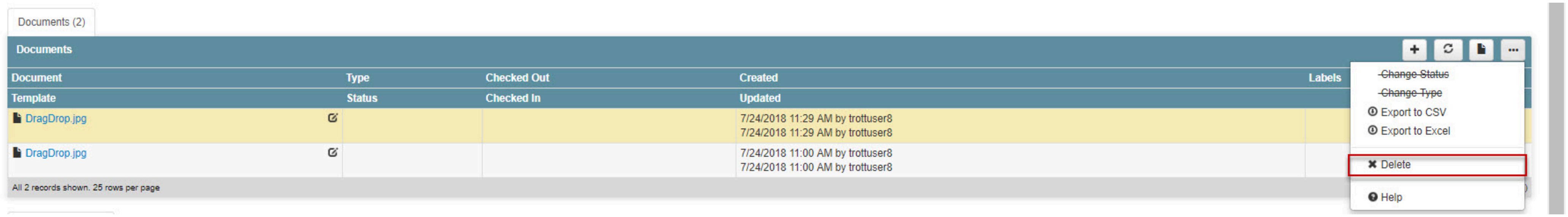


13.2 DELETING A DOCUMENT

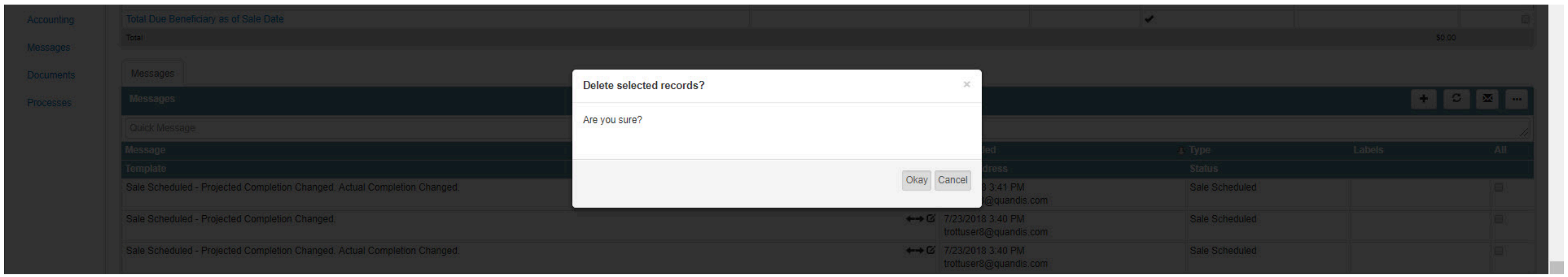
1. Click in the row of the document to be deleted.
   Note: Documents table within Foreclosure Summary page



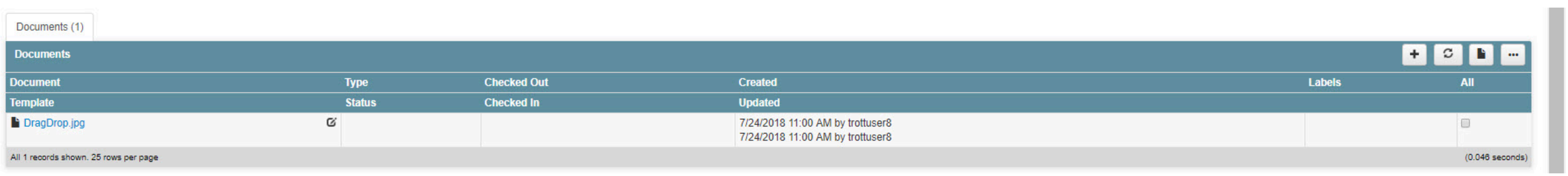
2. Select Delete from the Options drop-down menu.



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

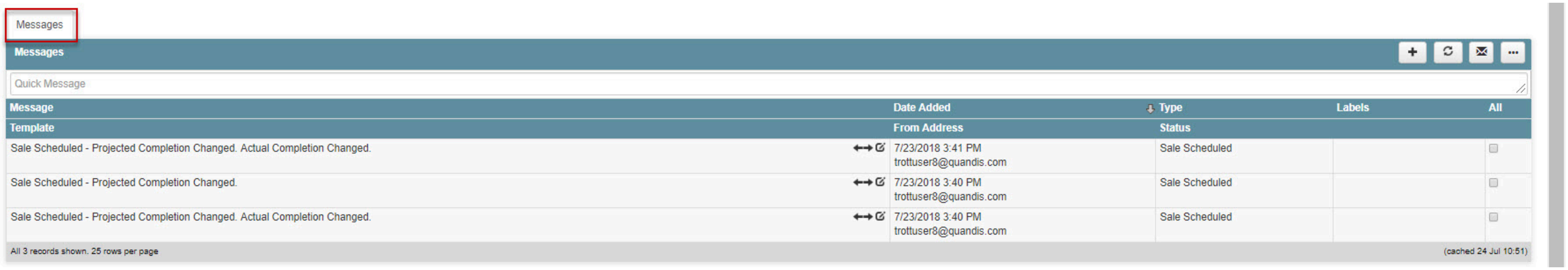


4. The document is deleted.

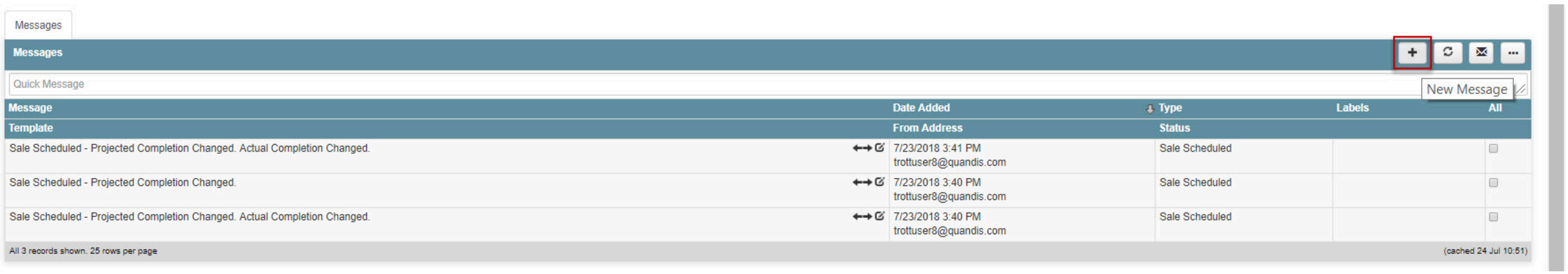


14 MESSAGES

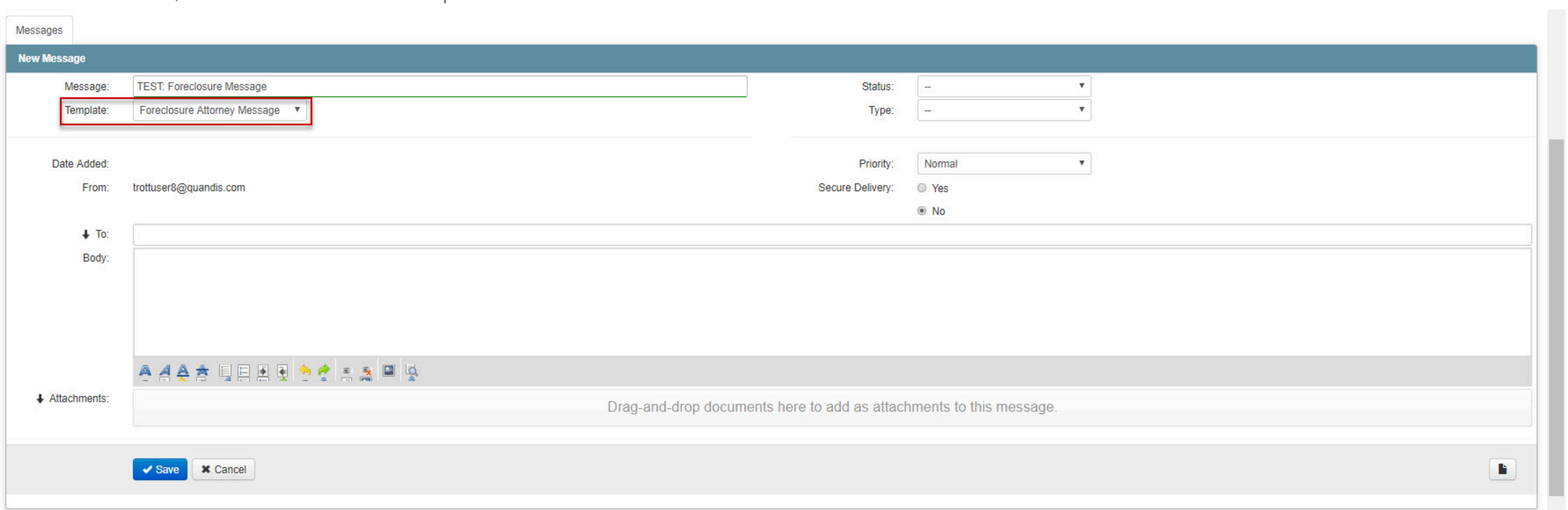
1. Click on the messages tab.



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



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.



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.

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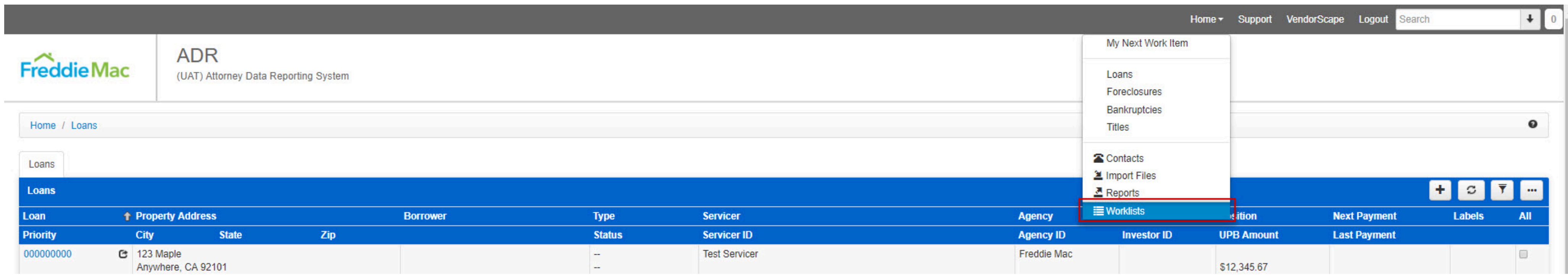
15 WORKLIST

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.

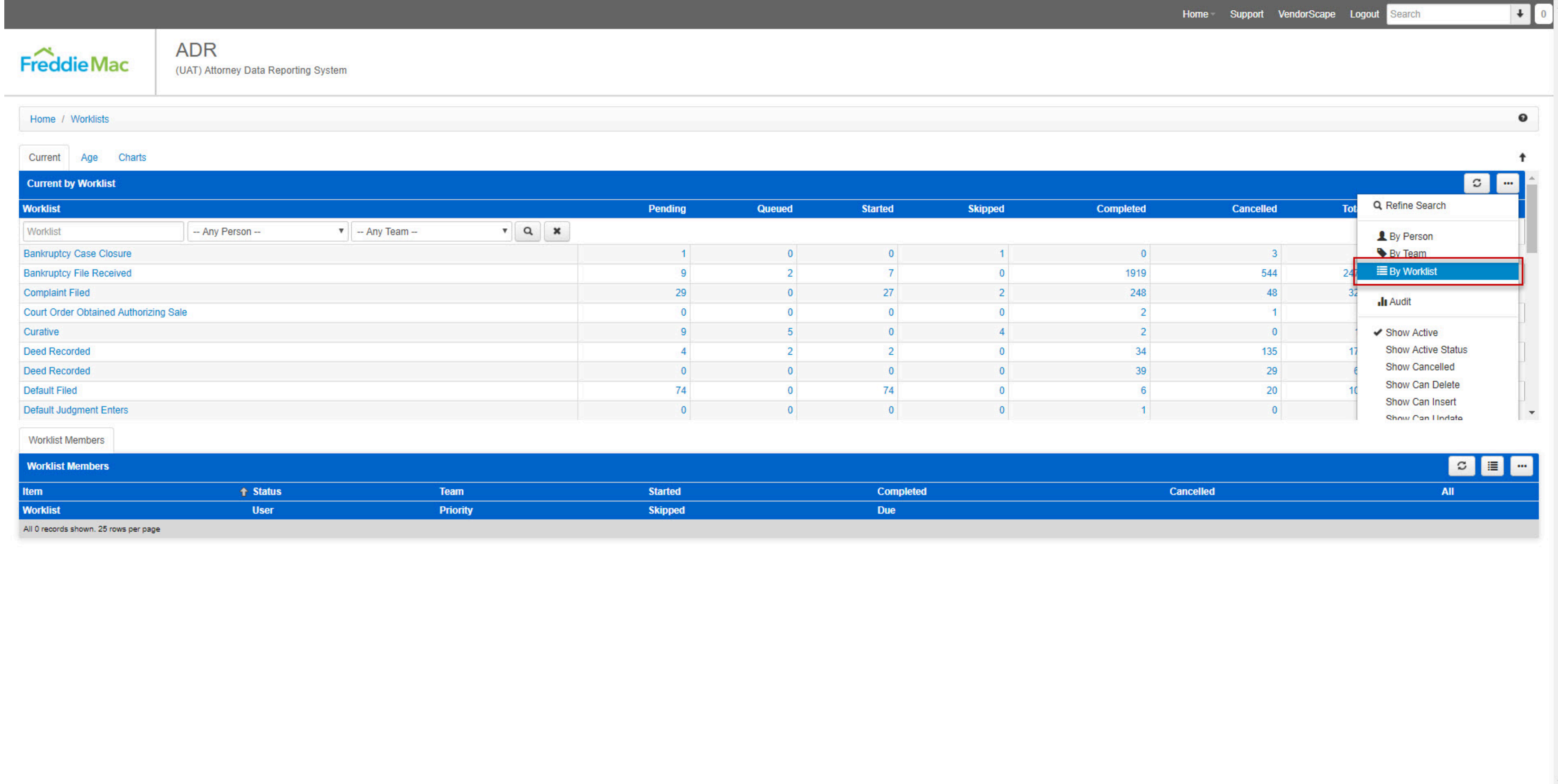
Access Worklists by choosing Home > Worklists



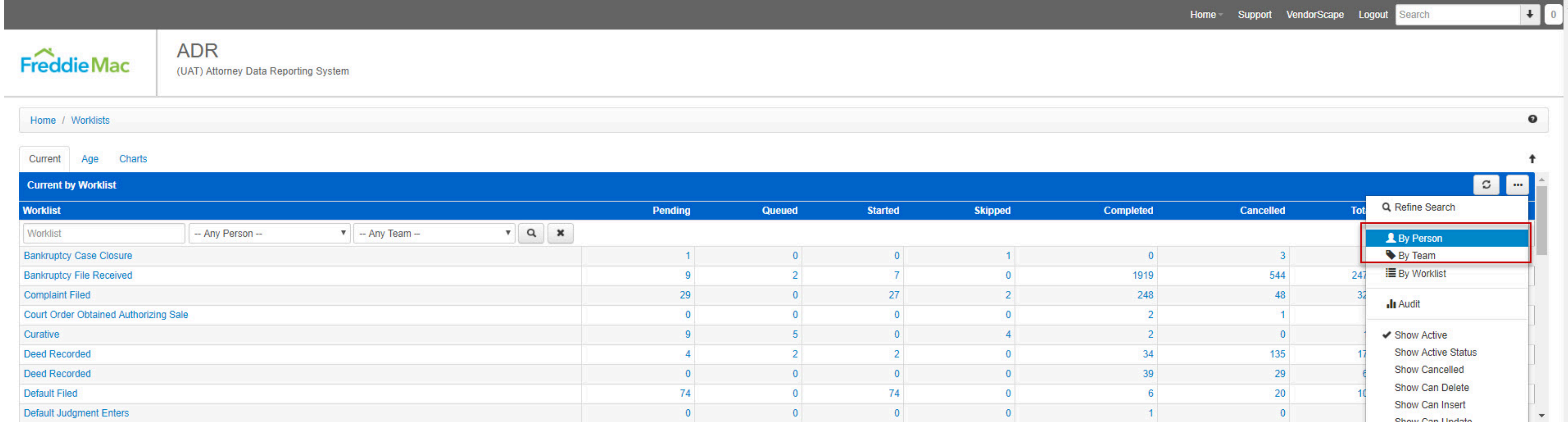
Note: Only users with the role of Manager can complete the below functions

15.1.1 VIEWING THE SMART WORKLIST TABLE

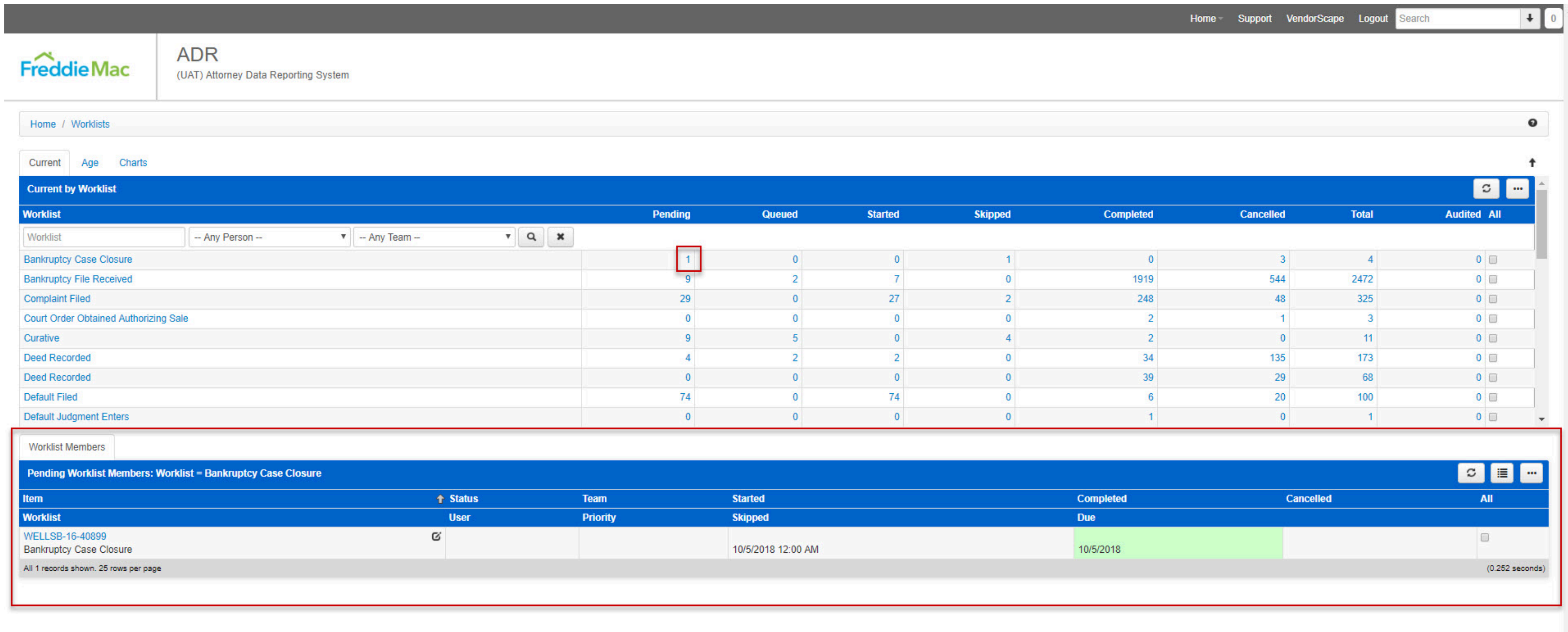
1. Select Home > Worklists.
2. To view the list of tasks available in the Smart Worklist, select "By Worklist" under the Options drop-down of the "Summary by Worklist" panel.



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

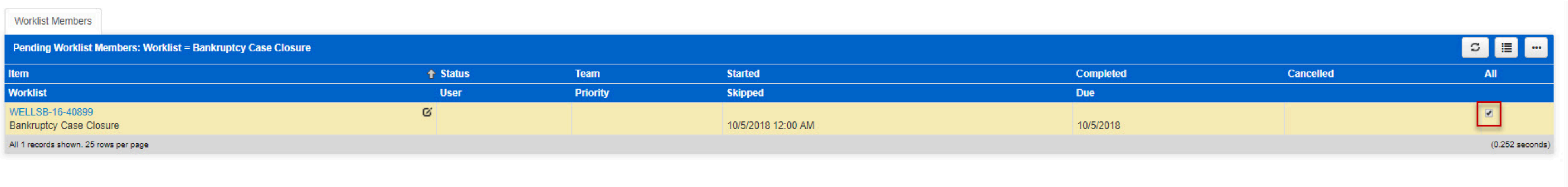


4. Selecting the name of the task or a number under a column (Items, Queued, Started, etc.) will open a 'Worklist Members' Panel.

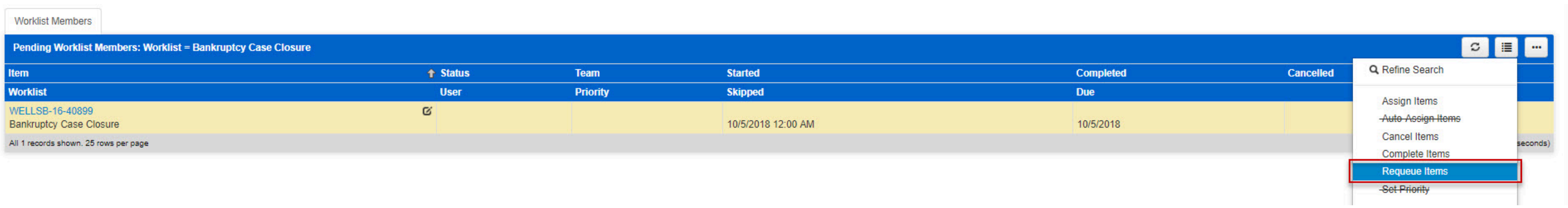


15.1.2 RE-QUEUE SMART WORKLIST ITEMS

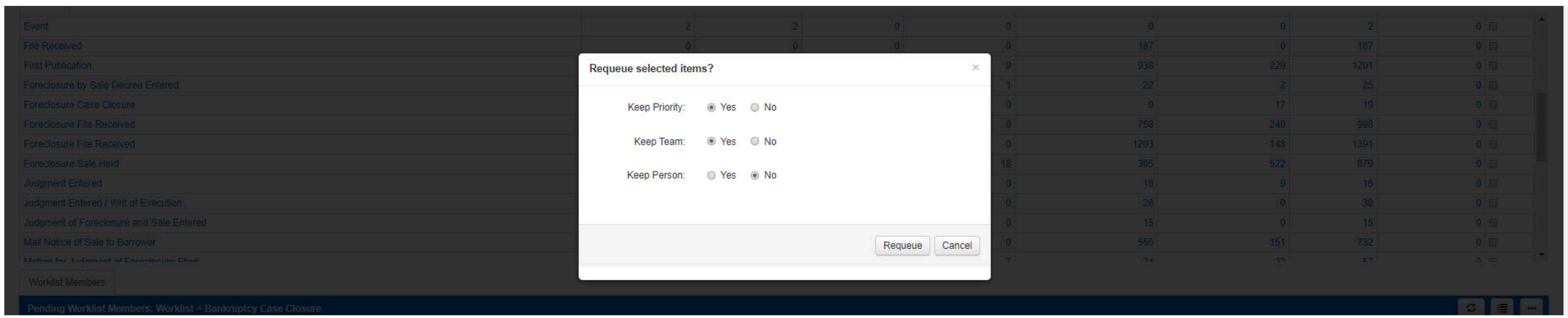
1. Re-queuing an item is to remove the “Completed” or “Cancelled” date from a task so that it may be moved into the worklist.
2. Select a task from the “Worklist” column in the “Summary by Worklist” panel.
3. In the “Items” panel, select the tasks that need to be re-queued by selecting the corresponding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



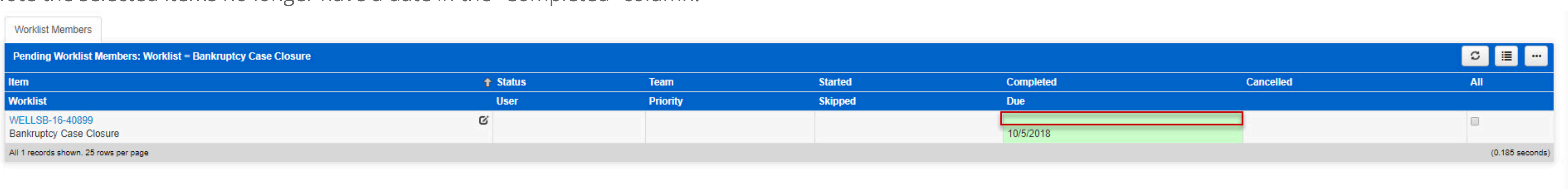
4. After the tasks have been selected, click “Requeue Items” from the Options drop-down.



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



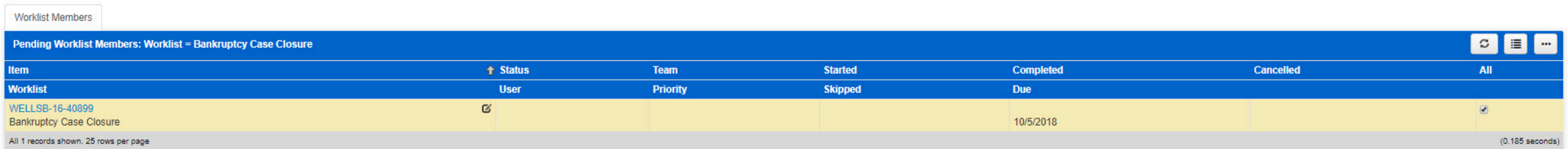
6. Note the selected items no longer have a date in the “Completed” column.



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

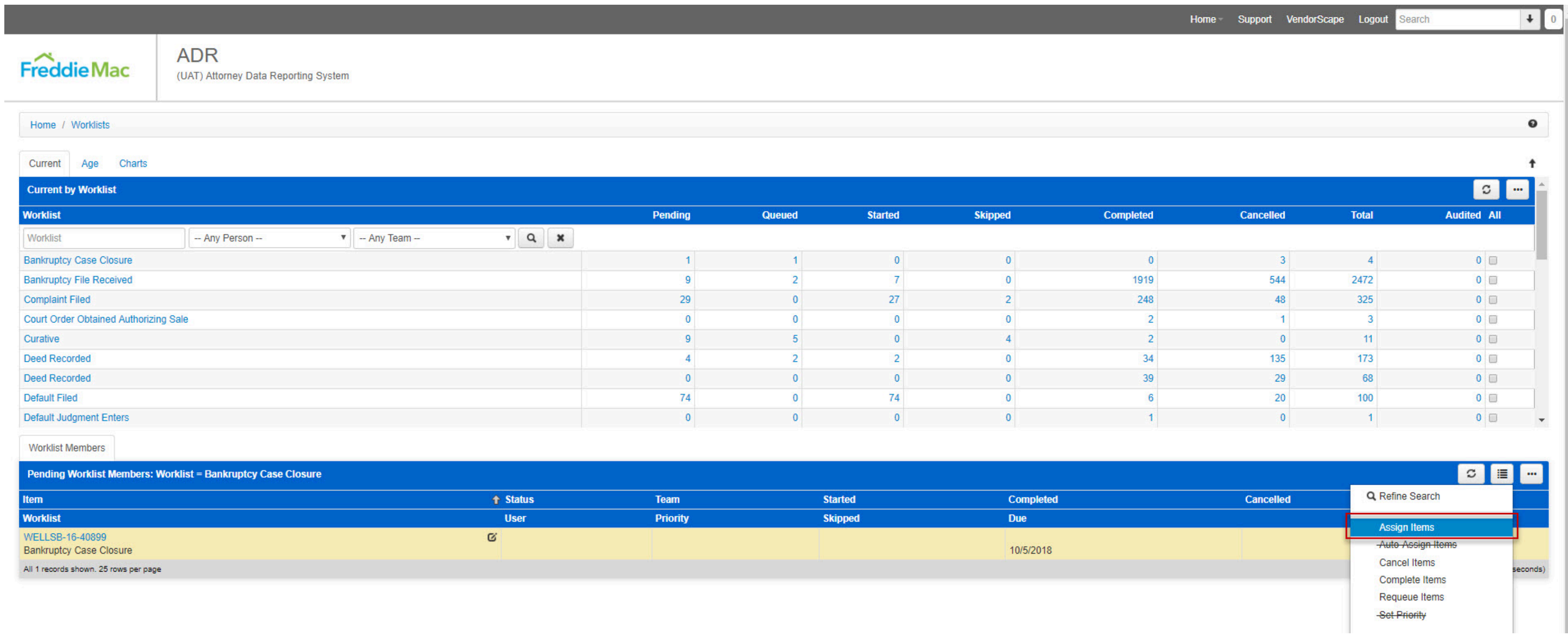
15.1.3 ASSIGN SMART WORKLIST ITEMS

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

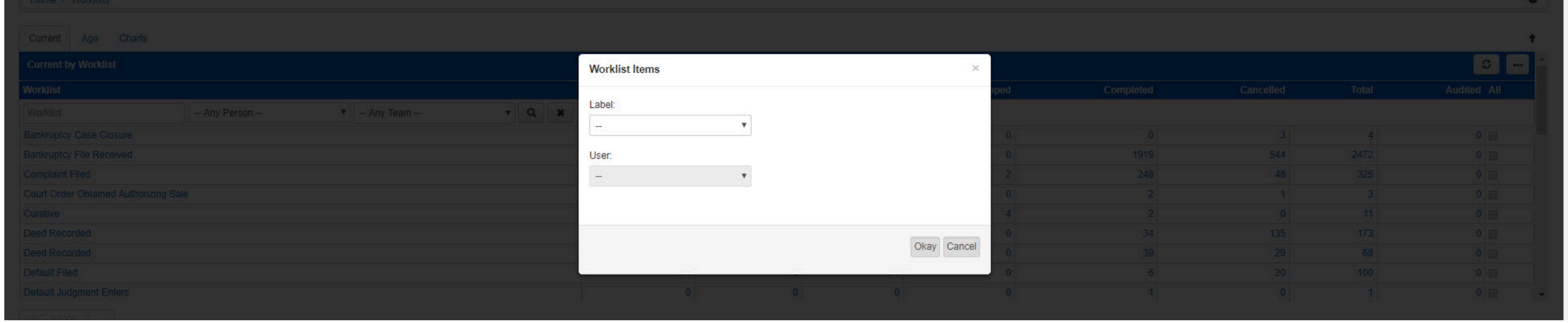


2. Select each task you wish to assign by selecting the checkbox to the corresponding task. Selecting "All" will select all tasks

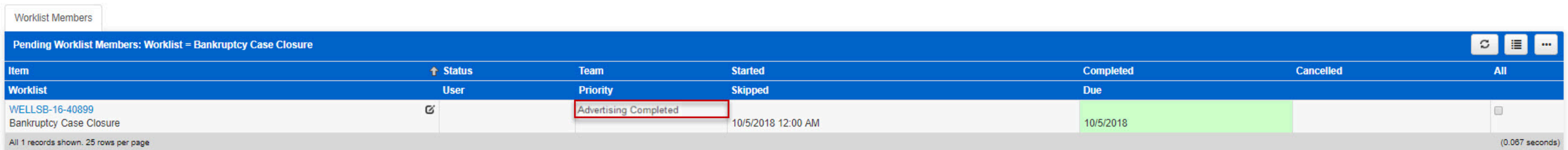
3. Once the proper tasks have been selected, click "Assign Items" from the Options drop-down.



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



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

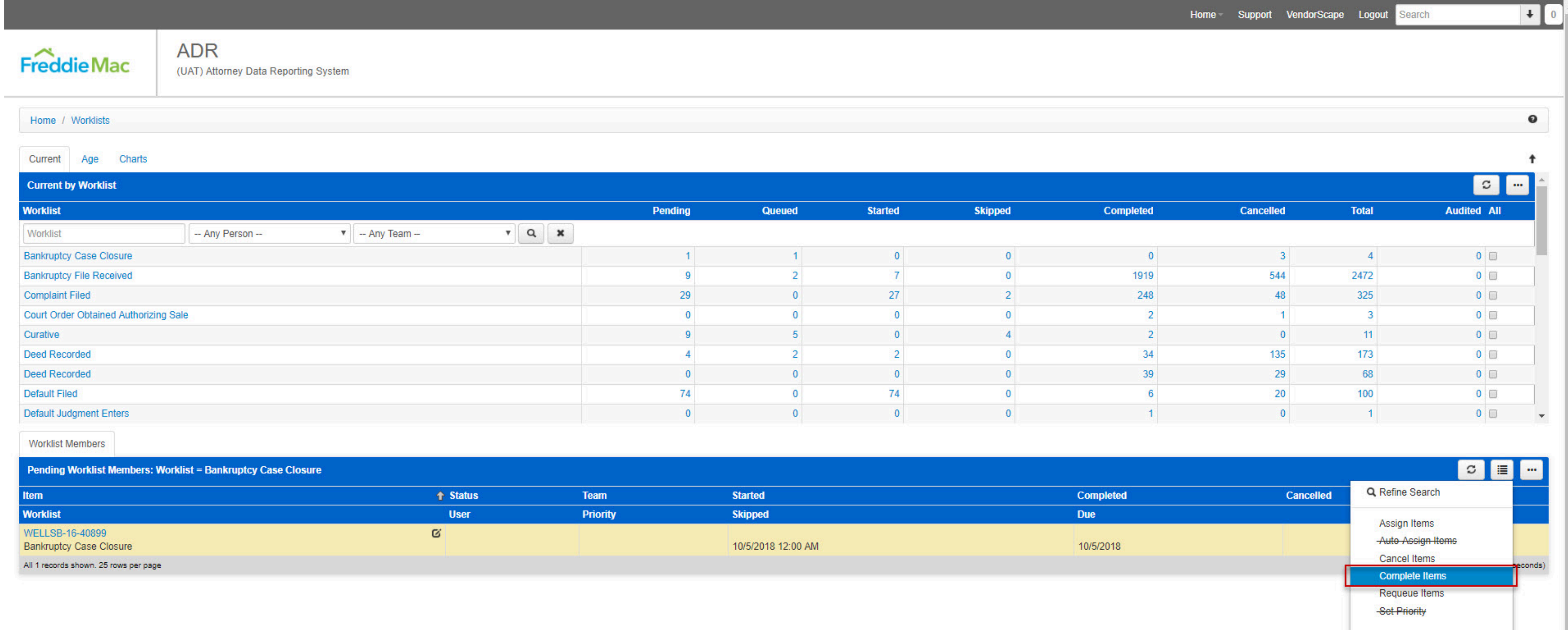


15.1.4 COMPLETE AN ITEM IN THE SMART WORKLIST

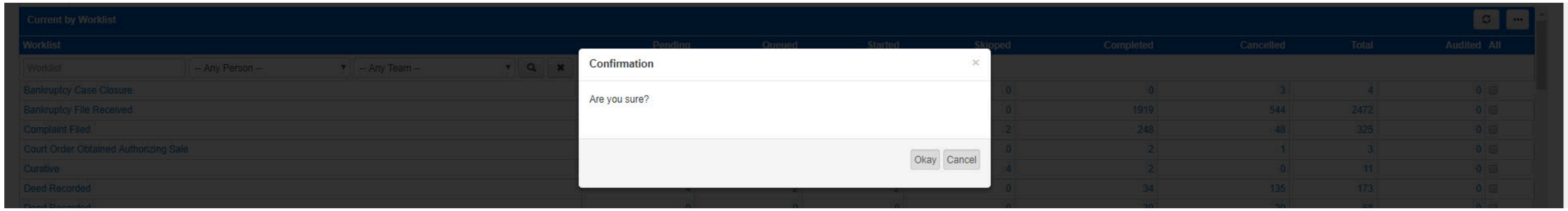
Note: Performing this function forces the worklist item into completion, it does not complete the underlying step tied to the task. This should only be done if any items are found in the worklist in error. For example, the Foreclosure case that the worklist item is tied to has been closed, but the item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



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.



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

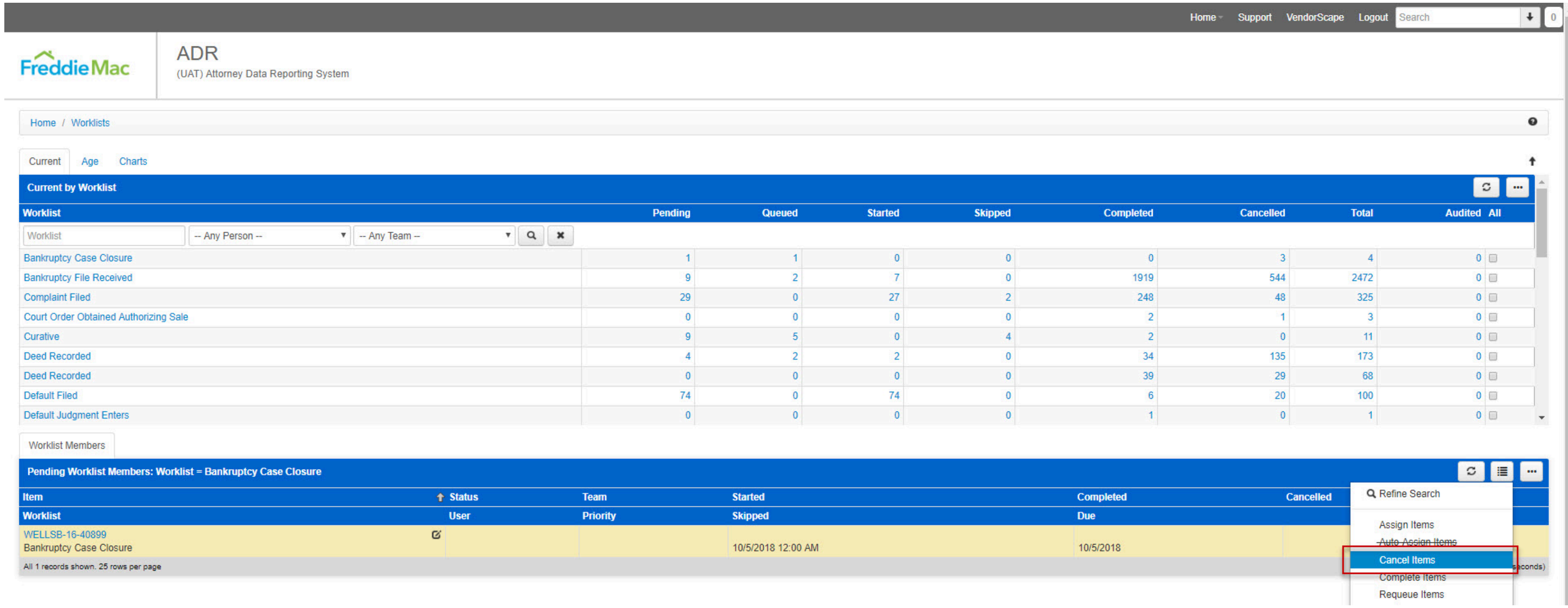
---

15.1.5 CANCEL AN ITEM IN THE SMART WOKLIST

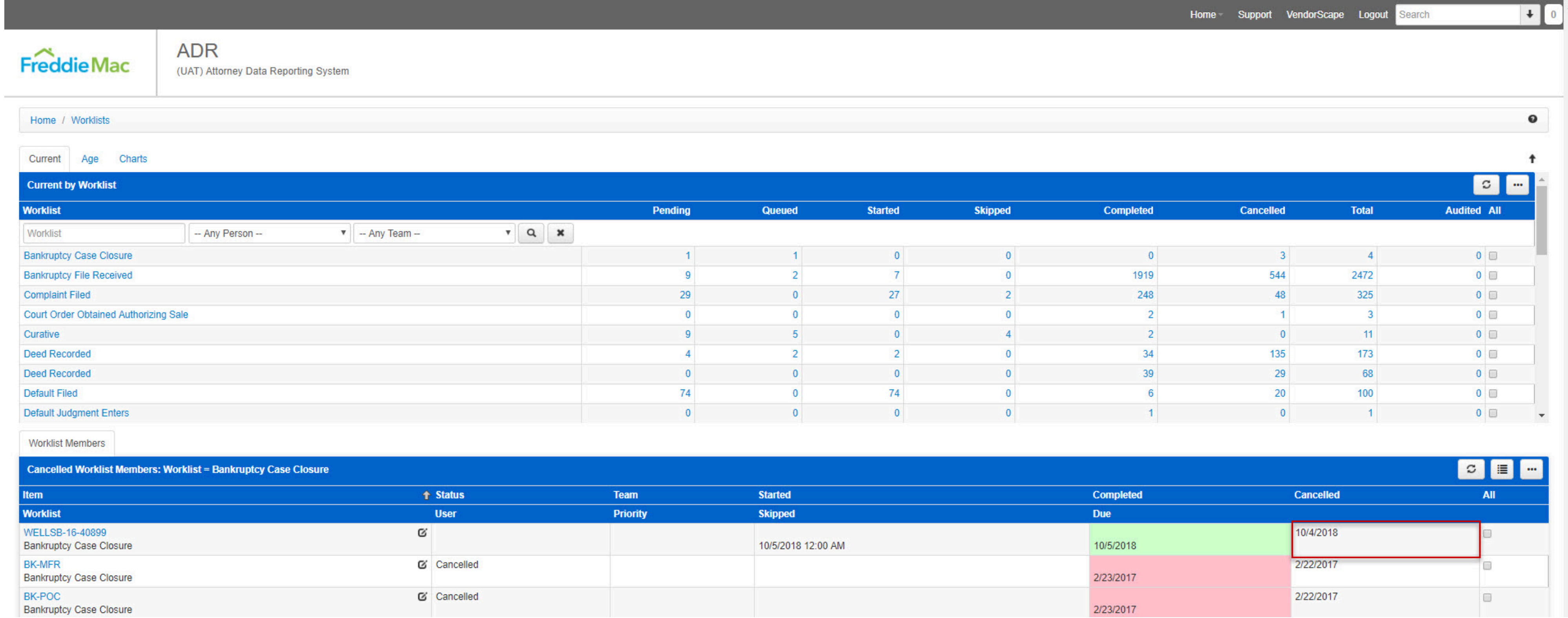
Note: Performing this function forces the worklist item into cancelation, it does not cancel the underlying step tied to the task. This should only be done if any items are found in the worklist in error. For example, the Foreclosure case that the worklist item is tied to has been closed, but the item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



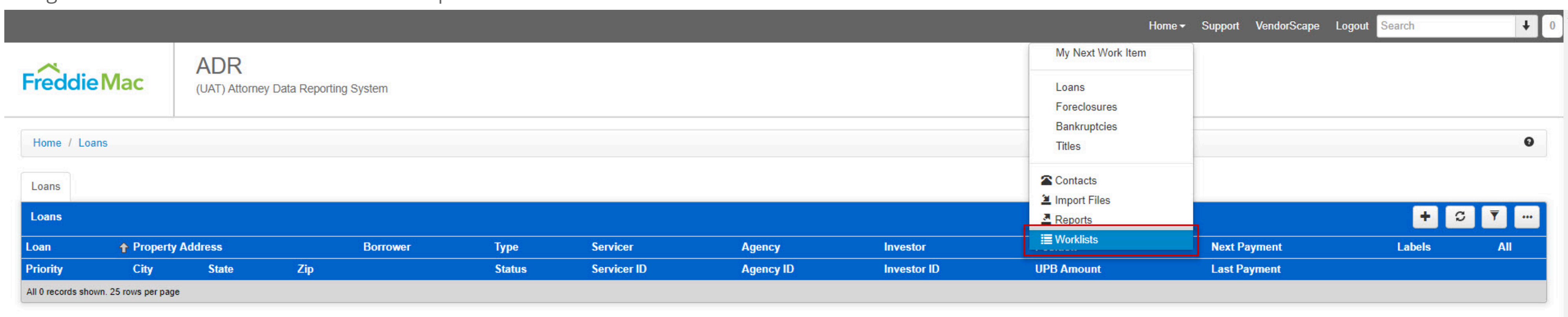
4. Once “Cancel Items” has been selected, the panel will automatically refresh and the task will have a “Cancelled” date.



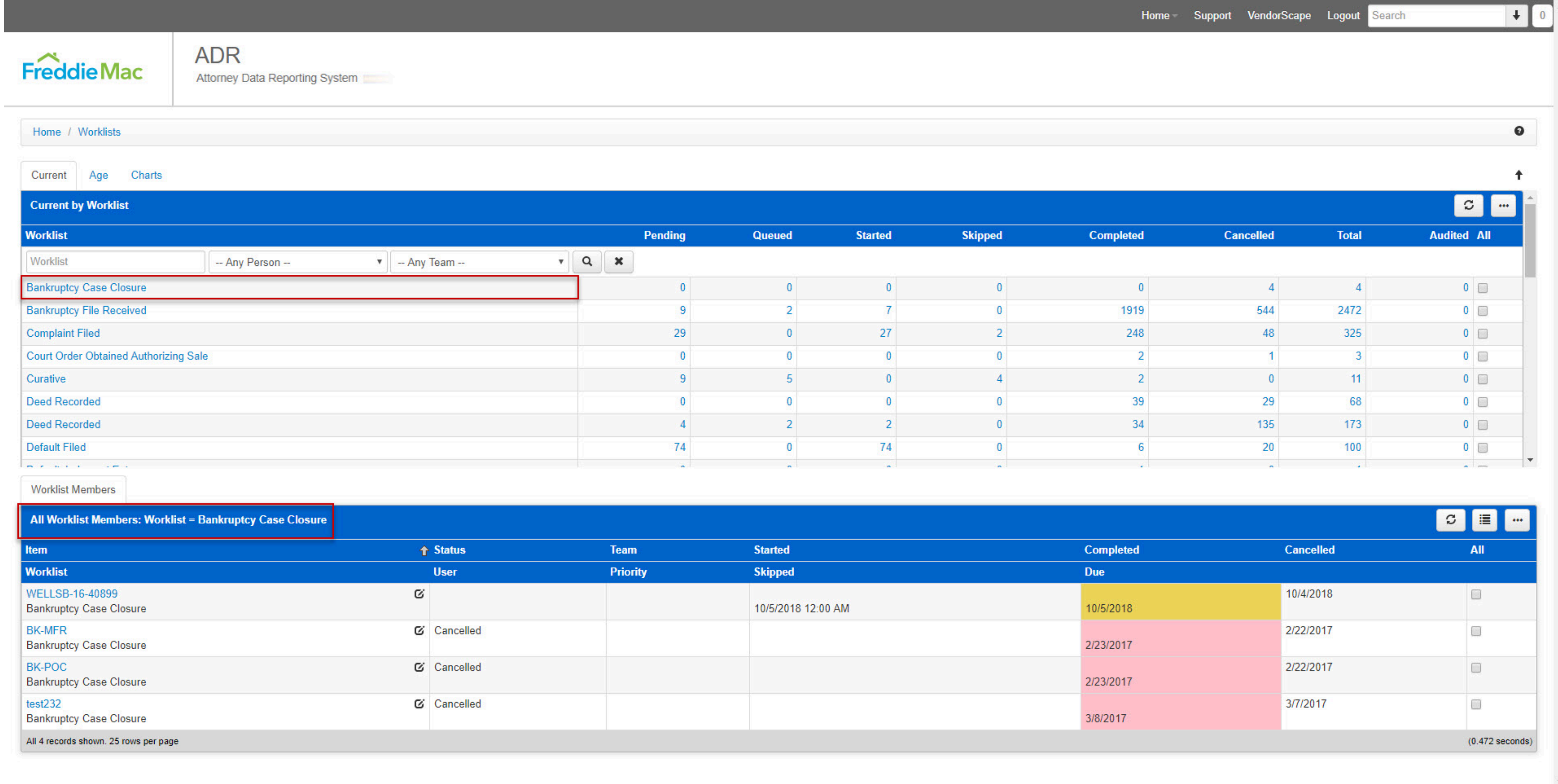
5. Cancelled items will not be shown under items in a “Pending” status, which can be selected from the Options drop-down menu.

15.1.6 EXPORT THE SMART WORKLIST

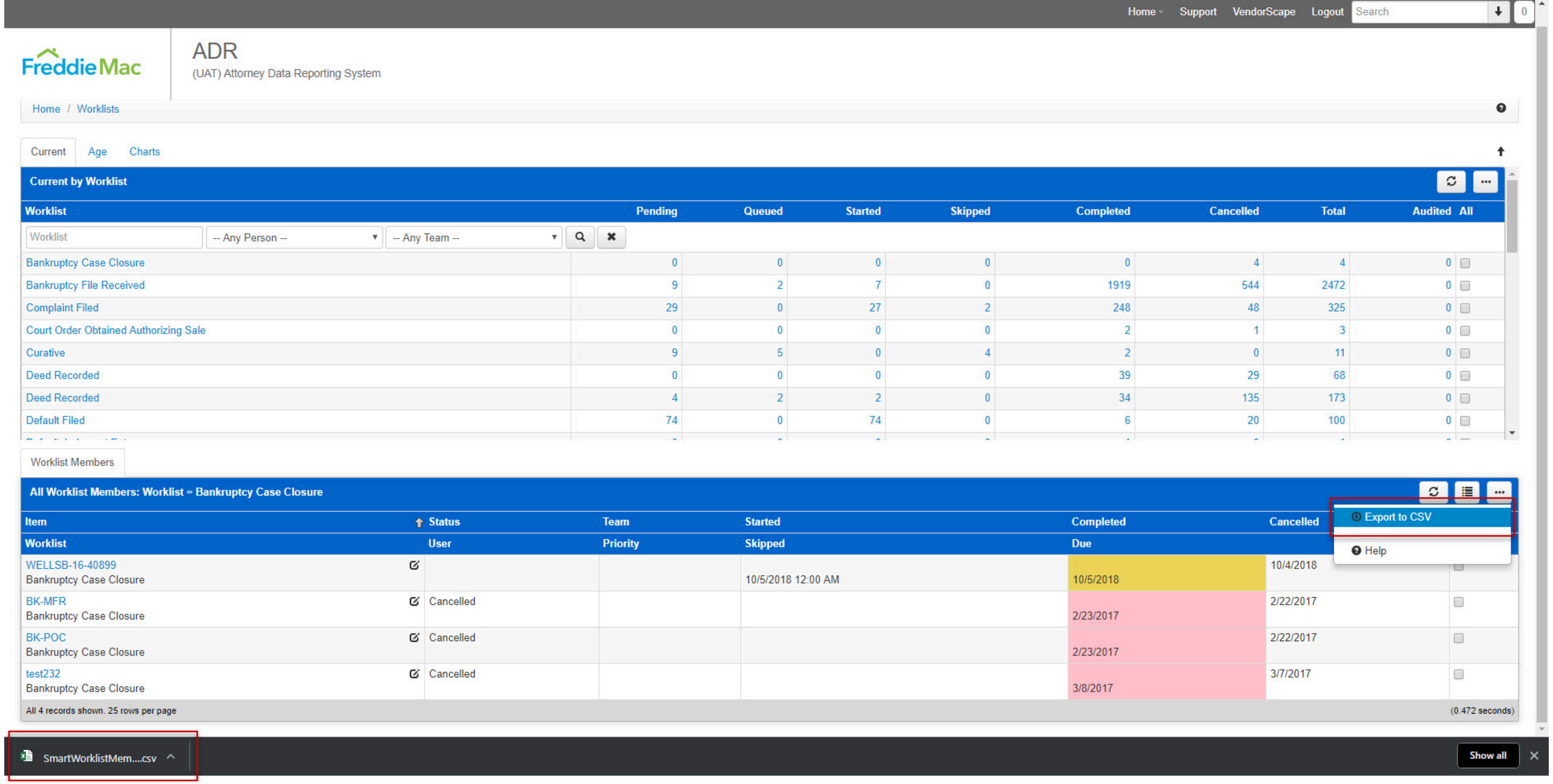
1. Navigate to Home > Worklists from Home dropdown menu



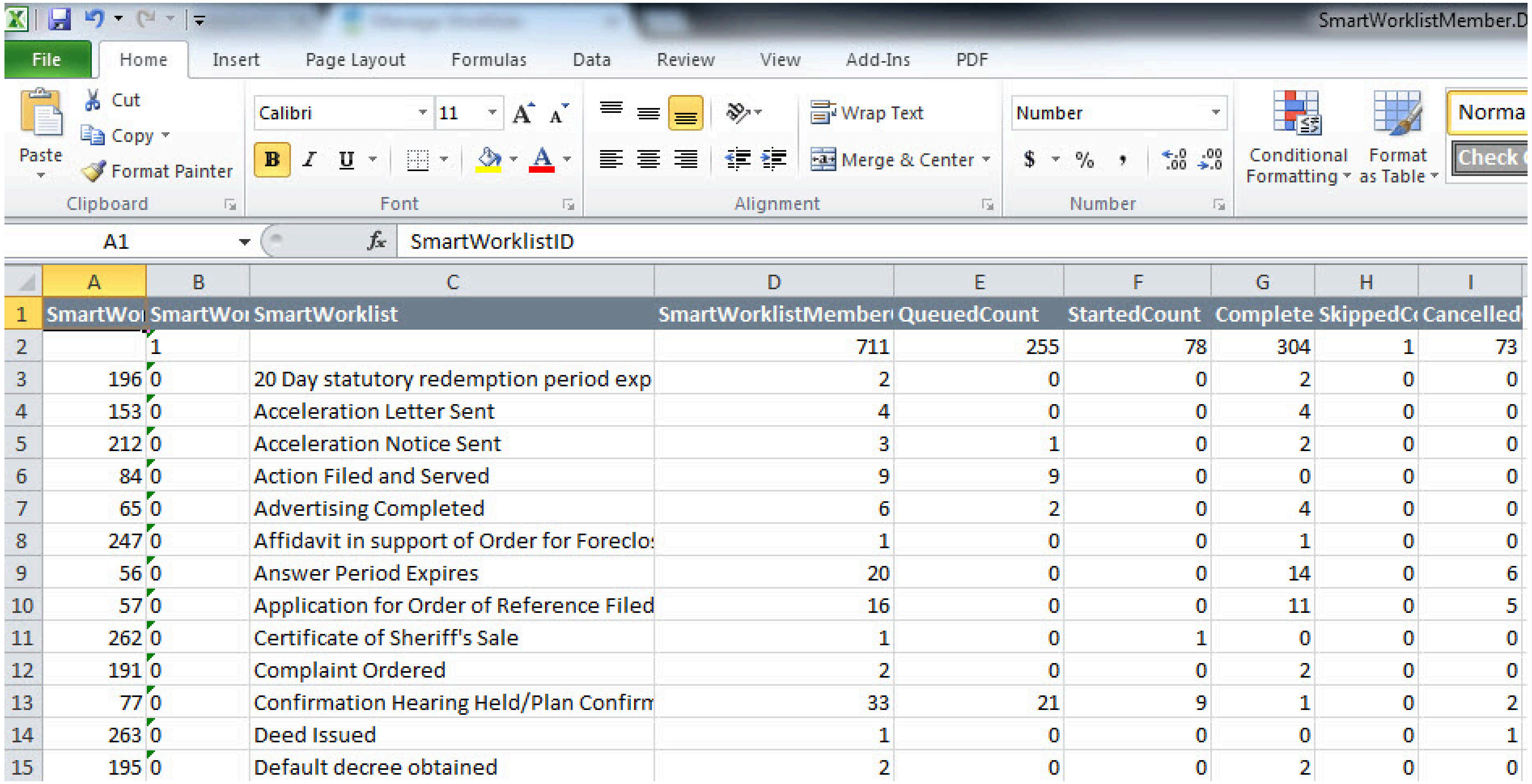
2. Select the desired Worklist you would like to export. In this example, ‘Bankruptcy Case Closure’ was selected, the items render in the ‘Worklist Members’ panel



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



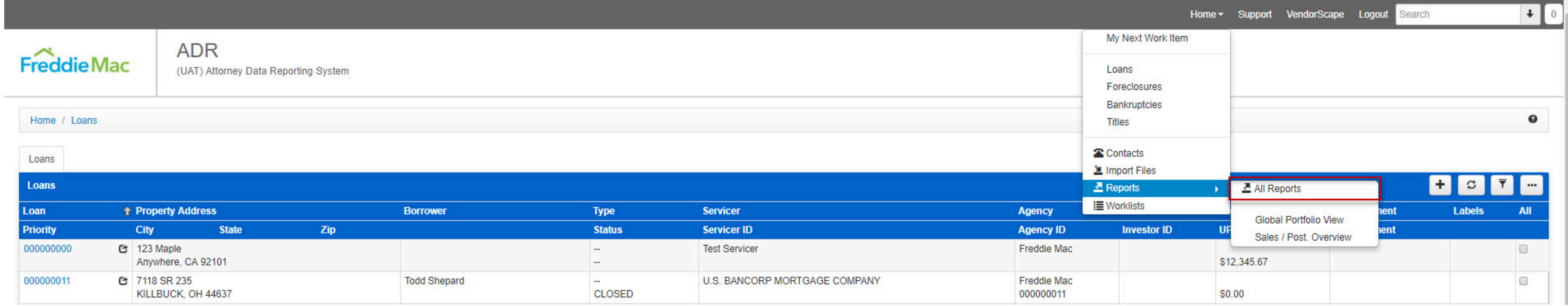
4. After selecting the file, you may review the Worklist in Microsoft Excel.



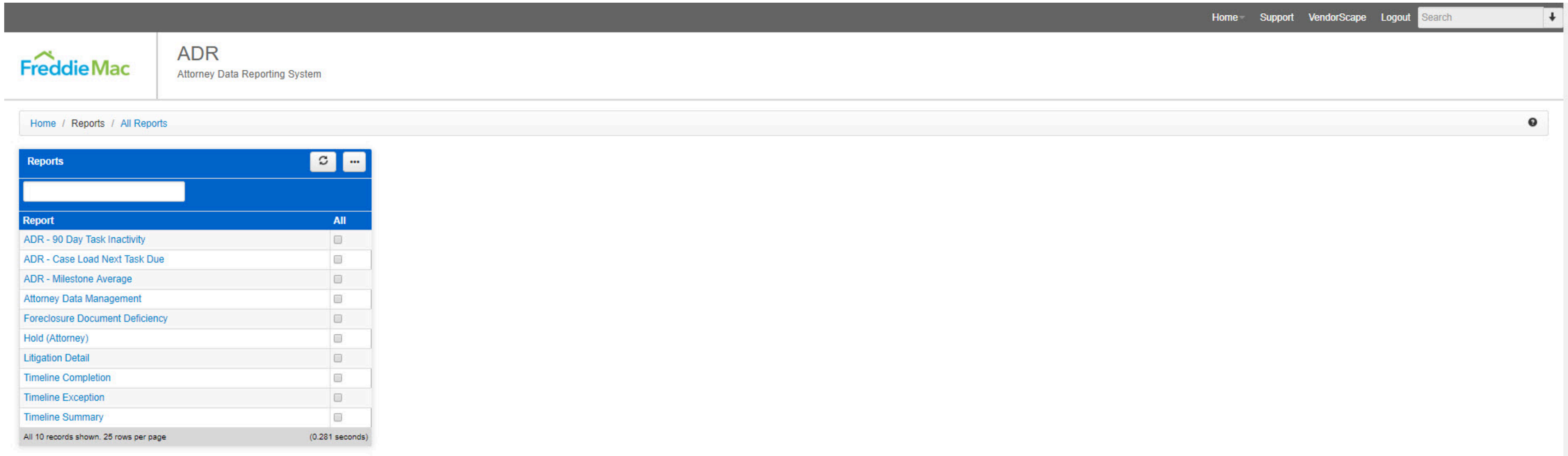
	A	B	C	D	E	F	G	H	I
1	SmartWo	SmartWo	SmartWorklist	SmartWorklistMember	QueuedCount	StartedCount	Complete	SkippedC	Cancelled
2		1		711	255	78	304	1	73
3	196	0	20 Day statutory redemption period exp	2	0	0	2	0	0
4	153	0	Acceleration Letter Sent	4	0	0	4	0	0
5	212	0	Acceleration Notice Sent	3	1	0	2	0	0
6	84	0	Action Filed and Served	9	9	0	0	0	0
7	65	0	Advertising Completed	6	2	0	4	0	0
8	247	0	Affidavit in support of Order for Foreclo:	1	0	0	1	0	0
9	56	0	Answer Period Expires	20	0	0	14	0	6
10	57	0	Application for Order of Reference Filed	16	0	0	11	0	5
11	262	0	Certificate of Sheriff's Sale	1	0	1	0	0	0
12	191	0	Complaint Ordered	2	0	0	2	0	0
13	77	0	Confirmation Hearing Held/Plan Confirm	33	21	9	1	0	2
14	263	0	Deed Issued	1	0	0	0	0	1
15	195	0	Default decree obtained	2	0	0	2	0	0

16 REPORTS

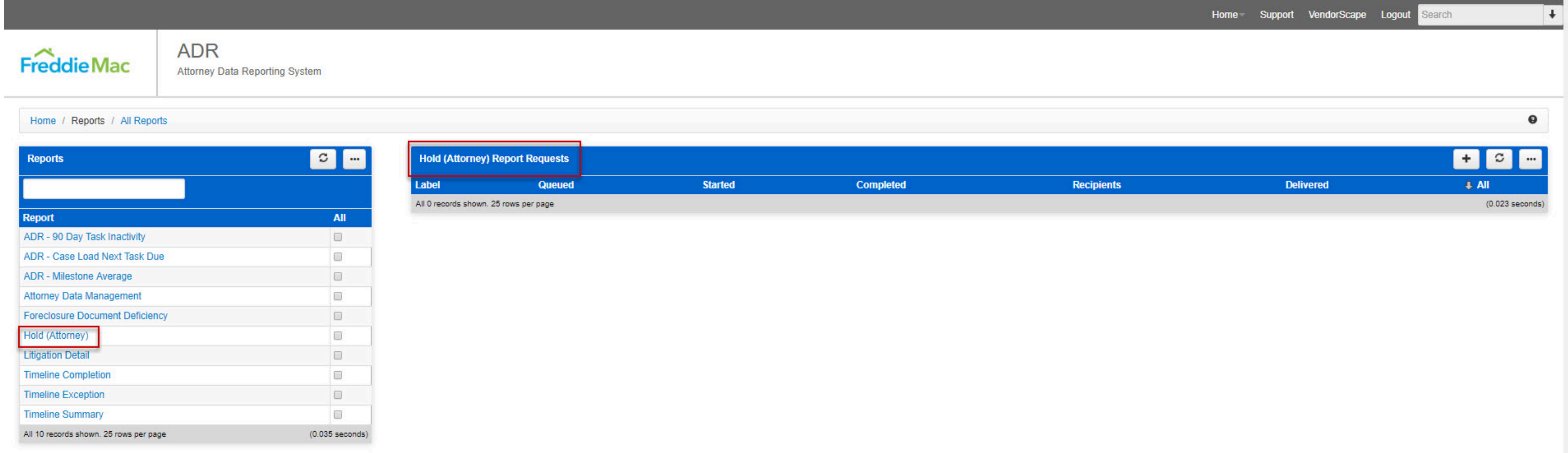
16.1 GENERATING A REPORT



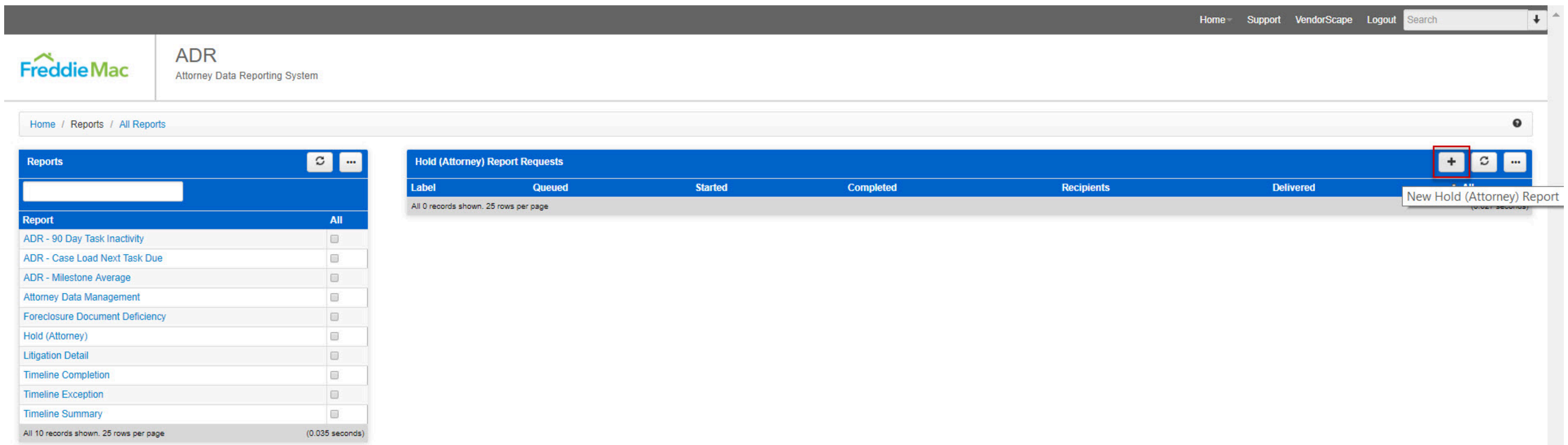
1. Select Reports from the Home dropdown menu.



2. You are directed to the Report Request page



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



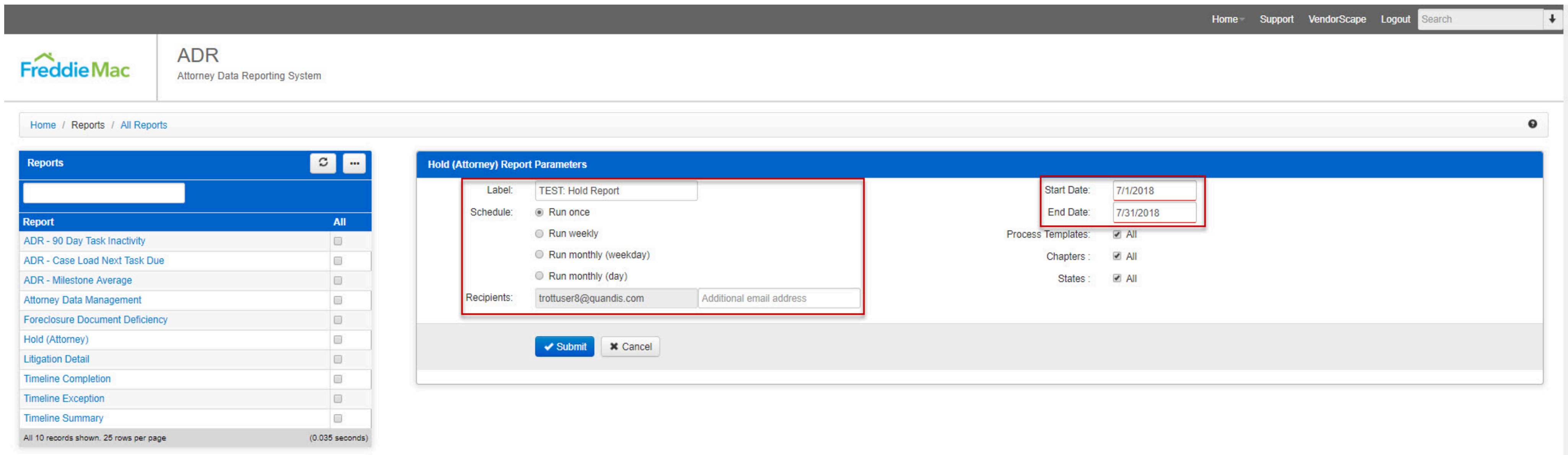
4. Select “+” to generate a new report.

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

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

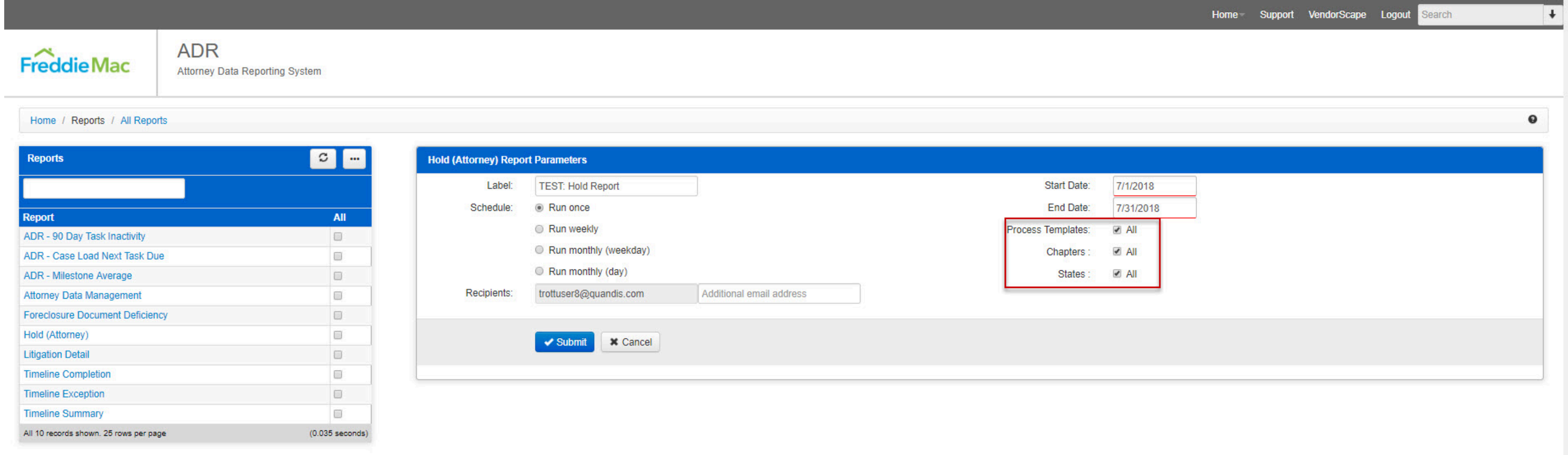
- Run Monthly: Generates monthly; Indicate the date the and time the report should be generated
- Run Weekly: Generates weekly; Indicate the day and time the report should be generated

- 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



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

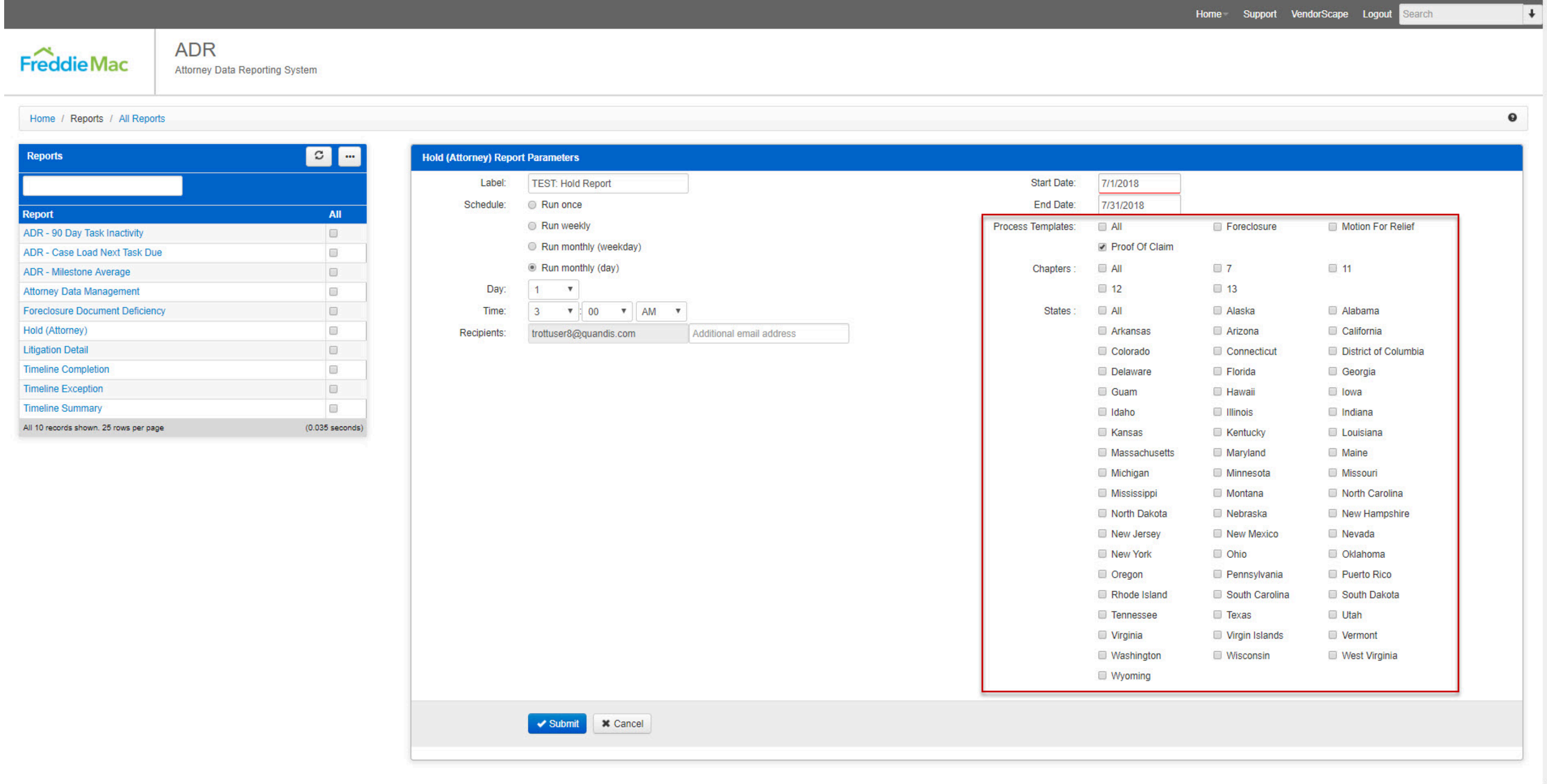


7. If you want to limit your report uncheck the “All” box to expand your options and select the appropriate boxes.

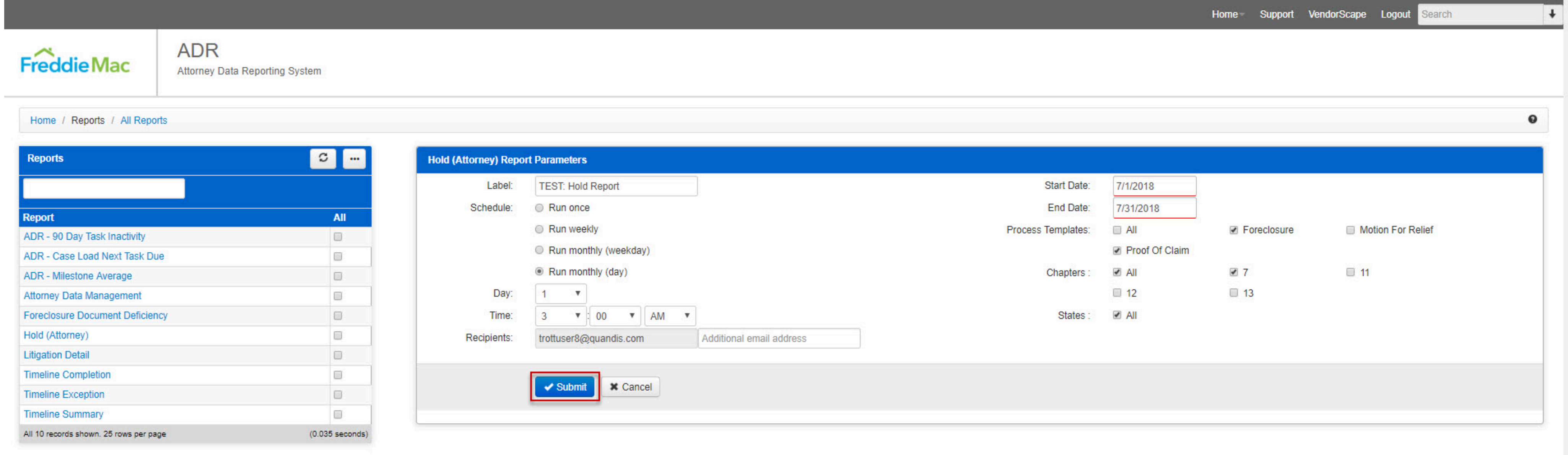
- Process Templates
- Chapters

  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.

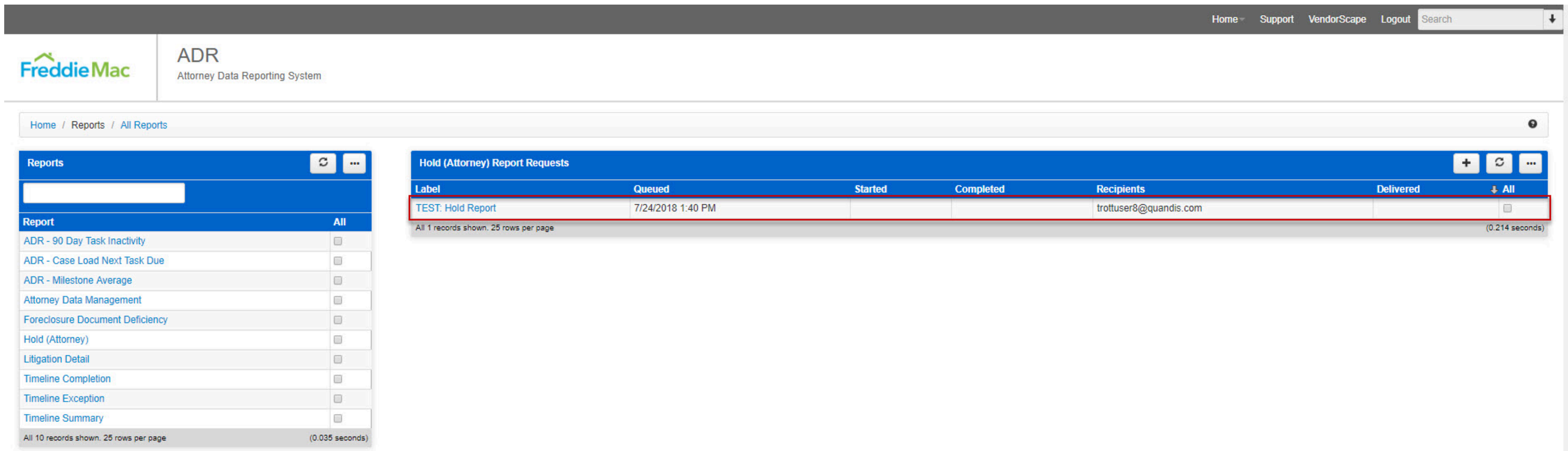
- States



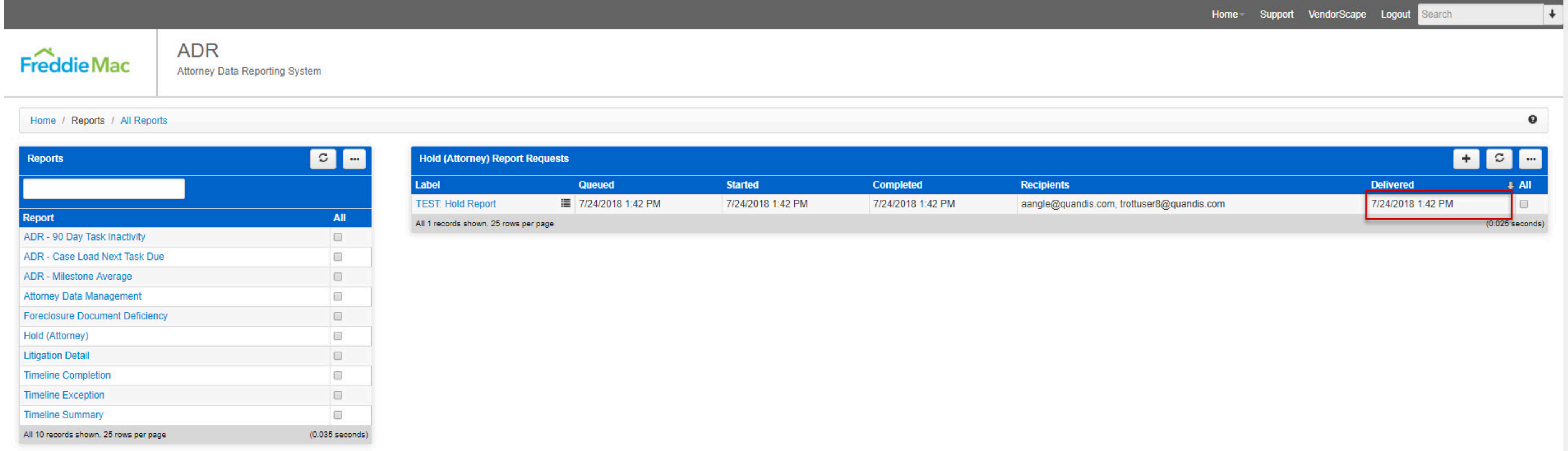
8. Click Submit once you have filled out the fields and checked the appropriate boxes.



9. You are directed to the Report Request page.



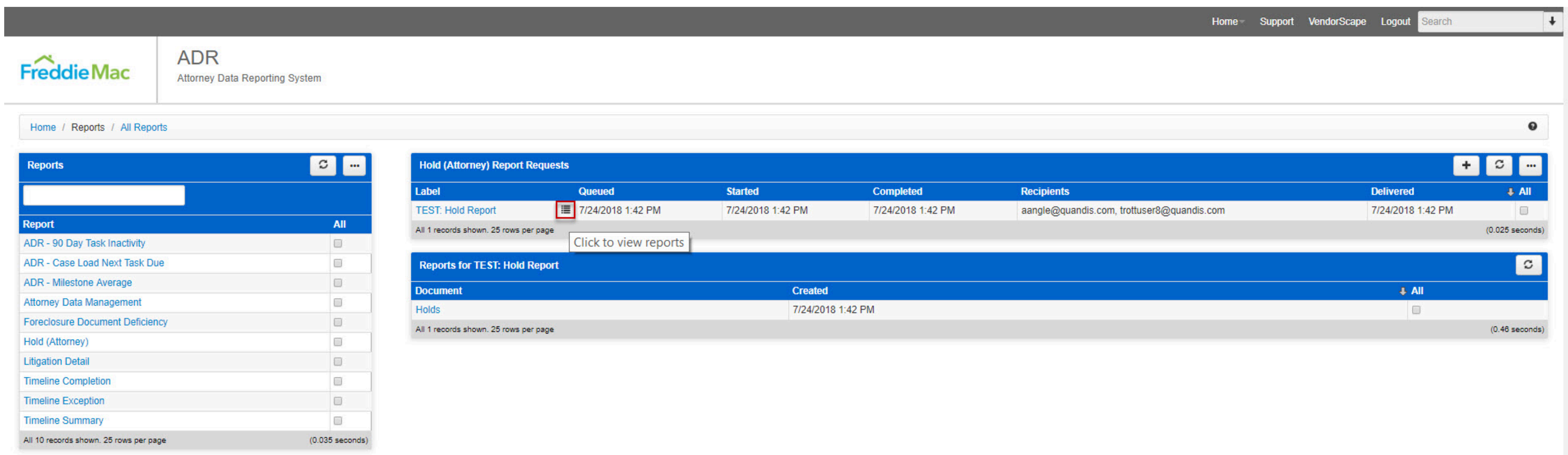
10. When the report has generated and is ready to view the delivered date will be populated.



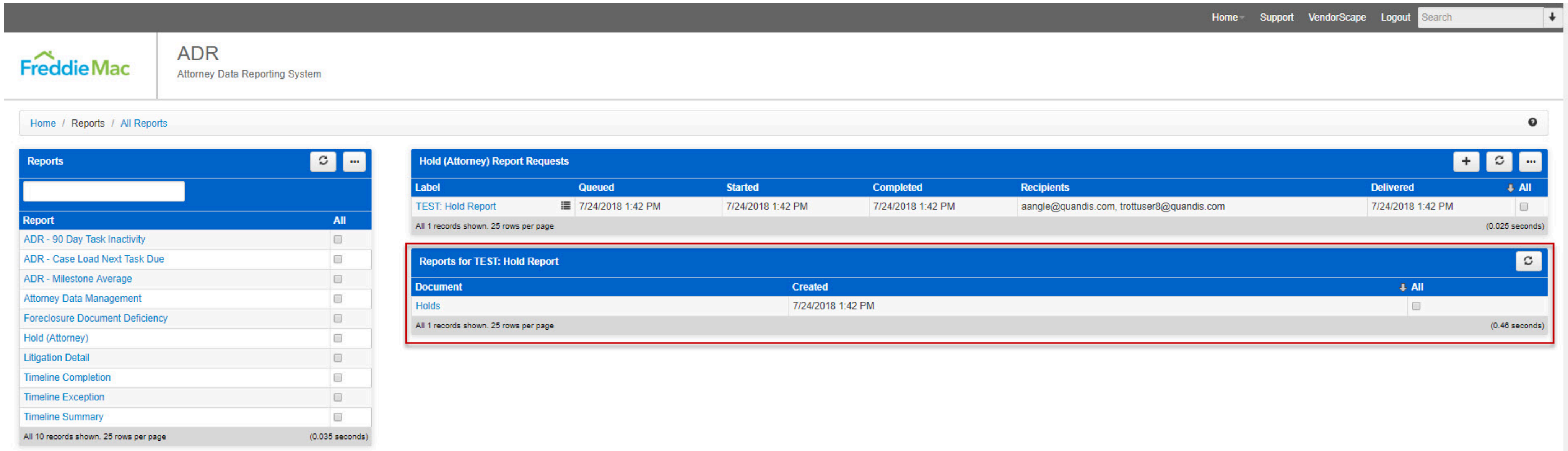
16.2 VIEWING A REPORT

16.2.1 REPORT REQUEST PAGE

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



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

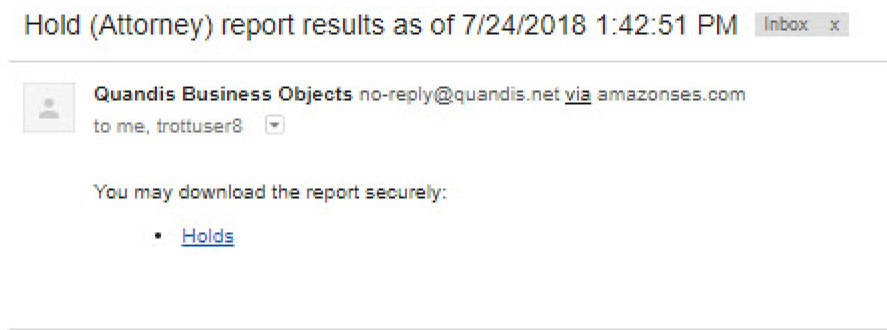


3. The report will open in an excel spreadsheet.

	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	56476hgdhgdbvbxcx	04/10/2013	05/01/2013	05/01/201	0	06/01/2013
10	NY	Foreclosure		ACME	Adequate Protection Order			112233	56476hgdhgdbvbxcx	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	05/01/201	0	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			628075519	13	04/25/2013	05/01/2013	05/01/201	0	05/24/2013
16	NY	Foreclosure		ACME	Cramdown			1723537	23-hhdd	05/01/2013	05/01/2013	05/01/201	0	05/31/2013
17	NY	Foreclosure		ACME	Cramdown			628075519	13	04/25/2013	02/25/2013	05/01/201	65	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	05/01/201	0	05/31/2013

16.2.2 EMAIL

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.


Hold (Attorney) report results as of 7/24/2018 1:42:51 PM Inbox x

Quandis Business Objects no-reply@quandis.net via amazonses.com
to me, trottuser8

You may download the report securely:

- 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**

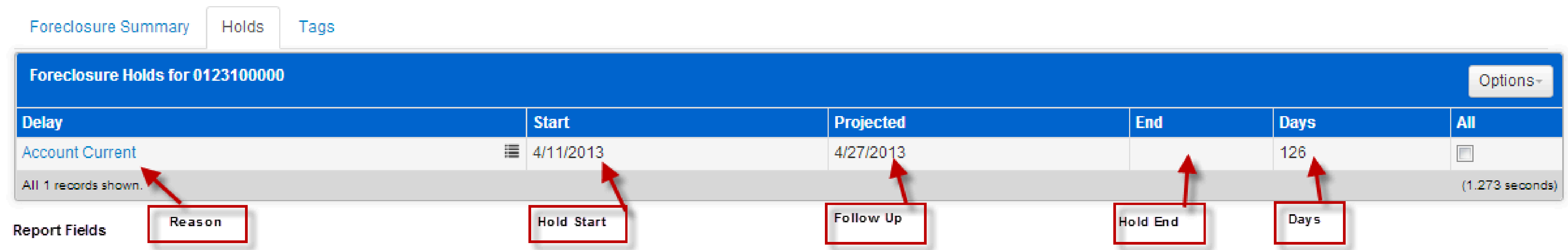
ForeclosureID	Foreclosure ID
AttorneyCaseNumber	Attorney Case Number
FreddieLoanNumber	Freddie Mac loan number
ServicerName	Servicer Name
Servicer Loan ID	Servicer Loan ID
ServicerLoanNumber	Servicer Loan Number
AttorneyName	Attorney firm
DaysPastDue	Days Past Due
FCProjectedSaleDate	Foreclosure Projected 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



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 and 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	Calculed based on Date ordered to cancelled date

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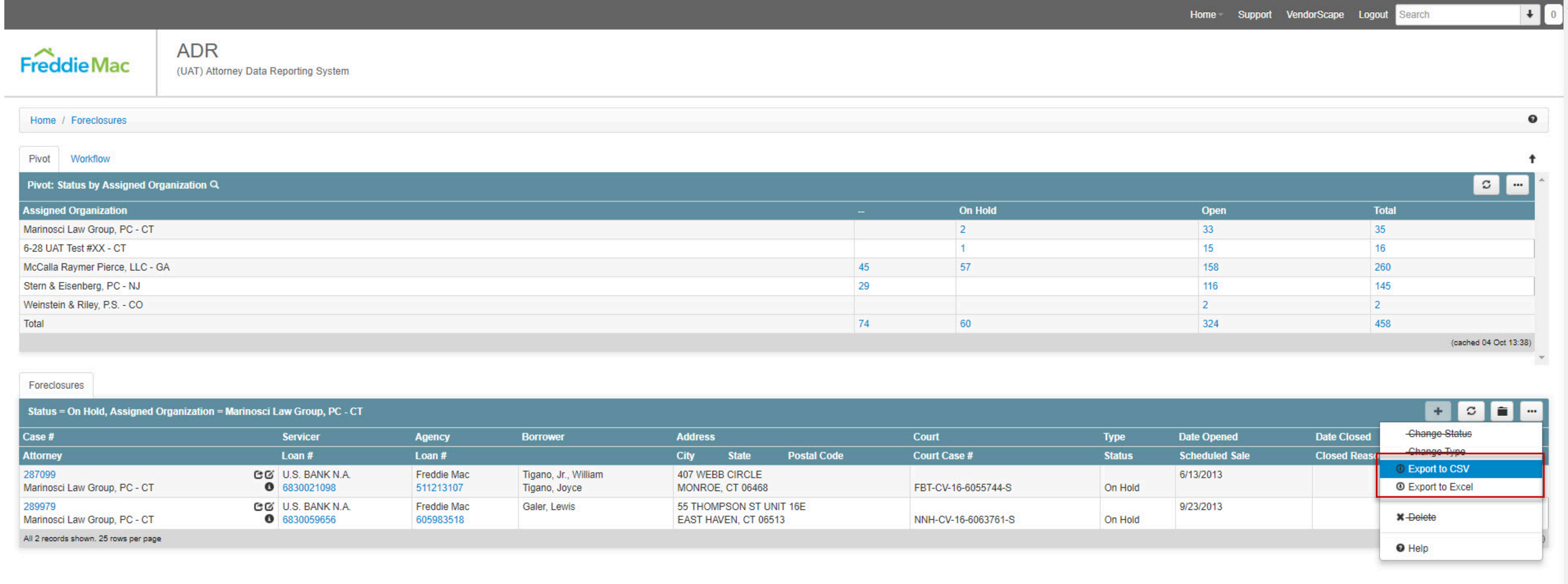
17 DASHBOARDS

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).

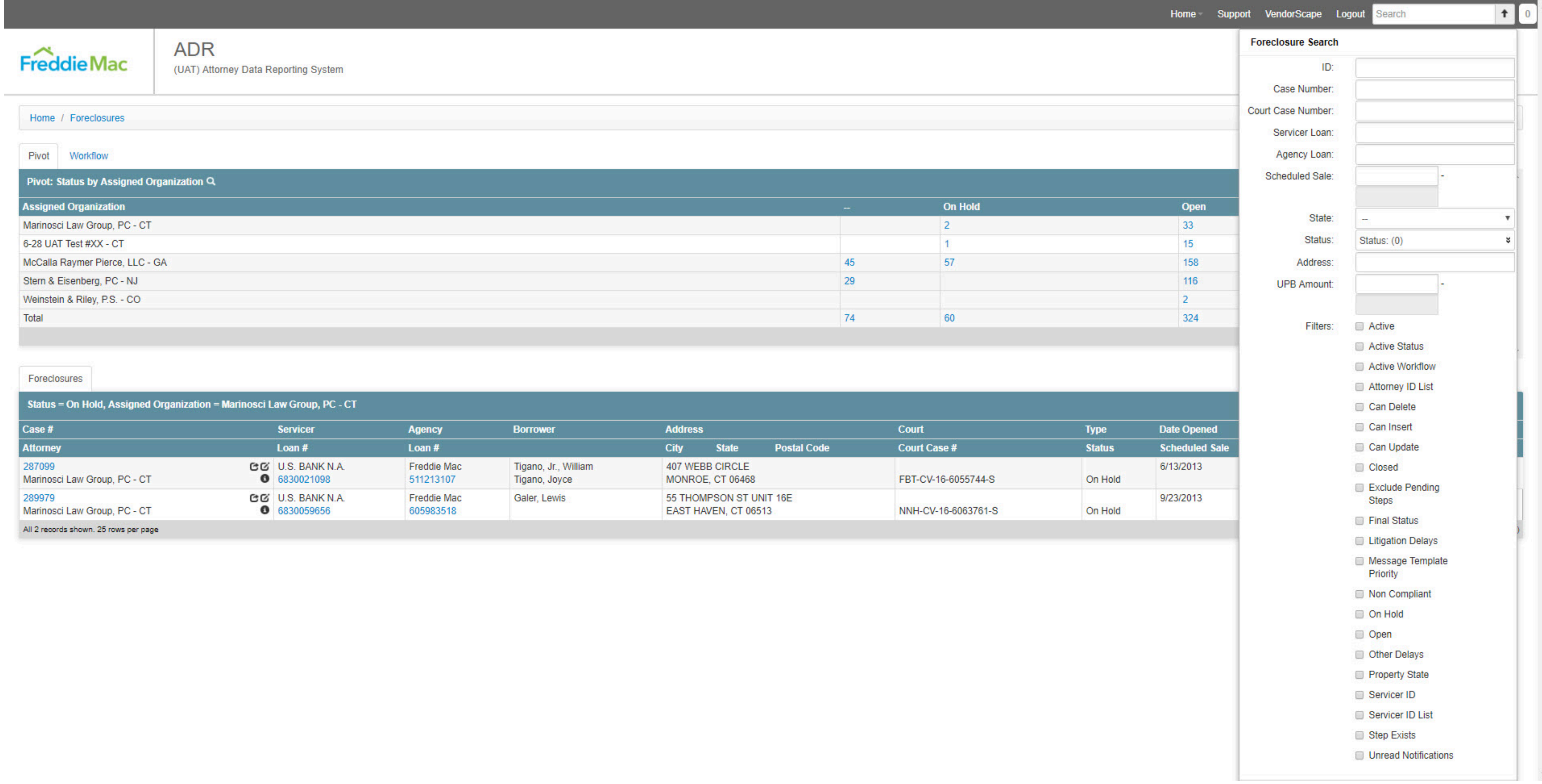
1. For example, if you were to choose Home > Foreclosures, you will see a panel with all file types you have access to. File types being On Hold, Open, etc. In the example below, we have chosen 2 under 'On Hold' column for 'Marinosci Law Group, PC – CT'
2. Once selected, the results appear in the panel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



3. From there, click 'Export to CSV' or 'Export to Excel', which will then trigger the process of downloading an Excel file.
4. 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

1. Users can filter their dashboard using the Advanced Search options (the arrow icon) located next to the Search bar.
2. 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.



18 STATE WORKLFOW

- 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

Process – State	Workflow Step

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