



# ADR ATTORNEY DATA REPORTING SERVICER USER GUIDE

## DOCUMENT REVISION HISTORY

Revision Date	System or Process Update	Section Updated
10-15-2018	Updated all screenshots for ADR updates and added new section for Direct Title Rollout	New sections include the following:  3.2.4 Ordering Loan Modification / Deed In Lieu Title 3.2.4.1 Title Order via Quandis Application 3.2.4.2 Title Order via File Drop  6 Title Home

03-20-2019	Updated Title Cancellation process Added Beneficiary Check Document Retrieval process Added Title Update Request process	6.3 Title Order Cancellation 6.5.1 Beneficiary Check Document Retrieval 6.6 Title Update Requests
06-25-2019	Added Title Order Inquiries Section	6.7 Title Order Inquiries
03-17-2025	Added Reports Section, moved State Workflow to Section 9	8 Reports / 9 State Workflow

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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 Servicer.

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

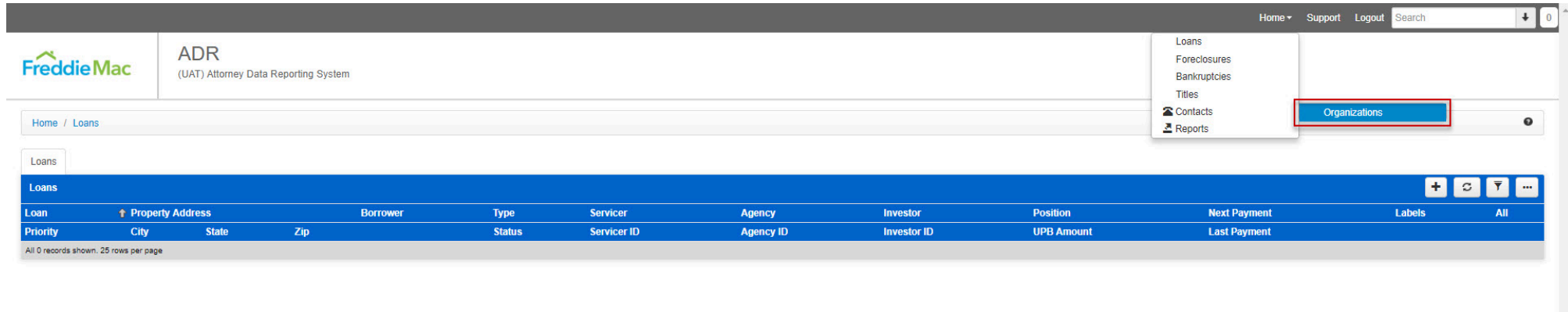
The Servicer role is reserved for users who need to view loans associated with their company in the ADR system.

If your company is new to the ADR system, you may contact [adr.support@quandis.com](mailto:adr.support@quandis.com) with the information below to request an initial user account, which will allow you to manage additional users within your Organization:

- Administrator Name
  - Administrator Email Address
  - Complete Address for your Company
  - Phone and Fax Numbers
  - List of Freddie Mac Servicer IDs associated with your Company
-

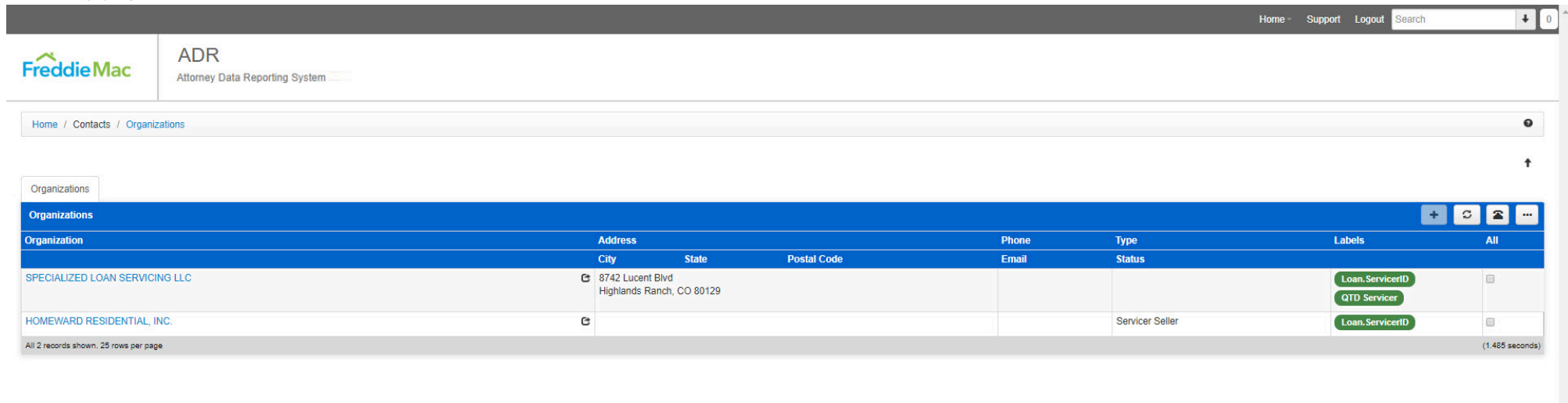
## 1.1 ADDING USERS

1. Select Organizations from the Contacts drop down.



The screenshot shows the FreddieMac ADR (UAT) Attorney Data Reporting System interface. The top navigation bar includes 'Home', 'Support', 'Logout', and a search box. A dropdown menu is open, showing options: 'Loans', 'Foreclosures', 'Bankruptcies', 'Titles', 'Contacts', 'Reports', and 'Organizations'. The 'Organizations' option is highlighted with a red box. Below the menu, a breadcrumb trail shows 'Home / Loans'. A table titled 'Loans' is visible, with columns for Loan, Property Address, Borrower, Type, Servicer, Agency, Investor, Position, Next Payment, Labels, and All. The table is currently empty, showing 'All 0 records shown. 25 rows per page'.

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.

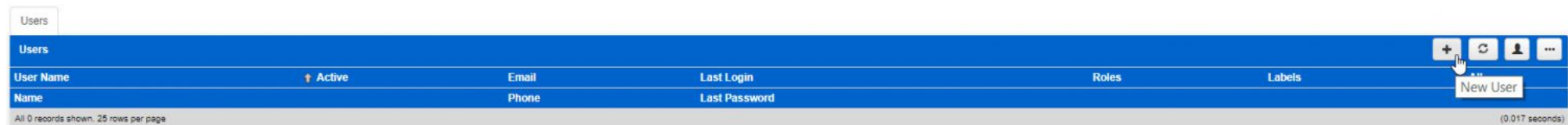


The screenshot shows the FreddieMac ADR (Attorney Data Reporting System) interface. The top navigation bar includes 'Home', 'Support', 'Logout', and a search box. A breadcrumb trail shows 'Home / Contacts / Organizations'. A table titled 'Organizations' is displayed, with columns for Organization, Address (City, State, Postal Code), Phone (Email), Type (Status), Labels, and All. The table contains two rows:

Organization	Address	Phone	Type	Labels	All	
	City	State	Postal Code	Email	Status	
SPECIALIZED LOAN SERVICING LLC	8742 Lucent Blvd Highlands Ranch, CO 80129					Loan.ServicerID QTD Servicer
HOMEWARD RESIDENTIAL, INC.					Servicer Seller	Loan.ServicerID

The table footer indicates 'All 2 records shown. 25 rows per page' and a loading time of '(1.485 seconds)'. A '+', 'refresh', and 'more' icon are visible in the top right of the table header.

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



The screenshot shows the FreddieMac ADR system interface. A breadcrumb trail shows 'Users'. A table titled 'Users' is displayed, with columns for User Name, Active, Email, Last Login, Roles, Labels, Name, and Last Password. The table is currently empty, showing 'All 0 records shown. 25 rows per page' and a loading time of '(0.017 seconds)'. A '+', 'refresh', 'person', and 'more' icon are visible in the top right of the table header. A tooltip labeled 'New User' is shown over the '+' icon.

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

ADR  
Attorney Data Reporting System

FreddieMac

Contracts

Users

Register

First Name: Ashly  
Last Name: Angle  
Email: testangle@quandis.com

System Roles:  Attorney  
 Security Administrator

Labels:

5. You are directed back to the Users panel

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

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

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

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

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

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

The screenshot shows a web application interface with a 'Users' table. The table has columns for 'User Name', 'Active', 'Email', 'Last Login', and 'Roles'. A dropdown menu is open over the table, and the 'Activate Users' option is highlighted with a red box. The table contains one record for 'test1234@quandis.com' with a status of 'Unconfirmed'.

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

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

The screenshot shows the 'Attorney Data Reporting' page for 'Relin, Goldstein & Crane'. A 'Confirmation' dialog box is displayed in the center, asking 'Activate these accounts?' with 'Okay' and 'Cancel' buttons. The 'Okay' button is highlighted with a red box. Below the dialog, the 'Users' table is shown with the 'Active' column updated to 'Yes' for the user 'test1234@quandis.com'.

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

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

The screenshot shows a web application interface with a 'Users' table. The table has columns for 'User Name', 'Active', 'Email', 'Last Login', and 'Roles'. A context menu is open over the table, and the 'Send Password Reset' option is highlighted with a red box. Other options in the menu include 'Show All', 'Show Active', 'Show Inactive', 'Show Unconfirmed', 'Unlock Users', 'Confirm Accounts', 'Activate Users', 'Deactivate Users', 'Add Role', 'Remove Role', 'Grant Access', and 'Revoke Access'.

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

10. Click Okay in the Confirmation dialogue box.

The screenshot shows the Freddie Mac ADR (Attorney Data Reporting System) interface. A confirmation dialog box is displayed in the center of the screen, asking 'Send password reset instructions to these accounts?'. The dialog box has 'Okay' and 'Cancel' buttons. The background shows the 'Organization Summary' for 'McCabe Weisberg & Conway, PC - MD'.

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

## Password Reset Email

Quandis Business Objects

to sbob

A password reset request has been issued for your account.

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

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

Thank you.

## 1.2 ADDING A ROLE TO A USER

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

Users

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

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

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

Users

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

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

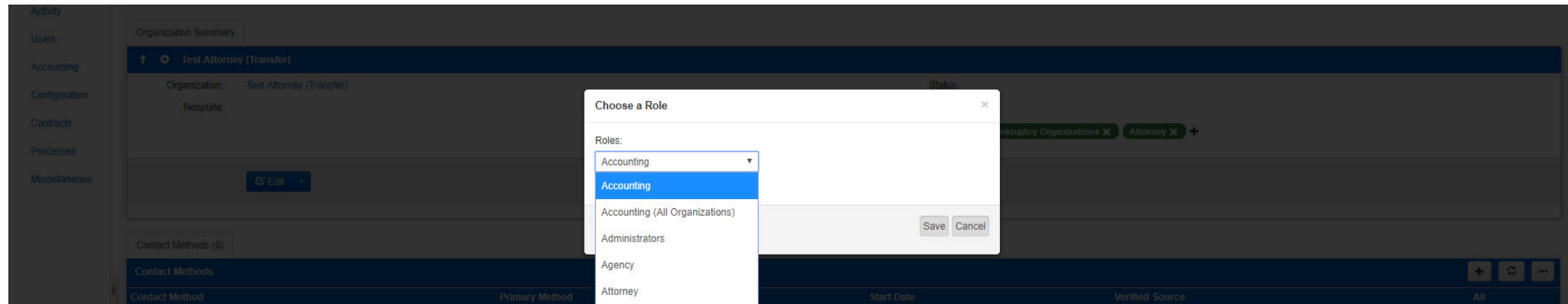
Ledgers Payment Methods

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

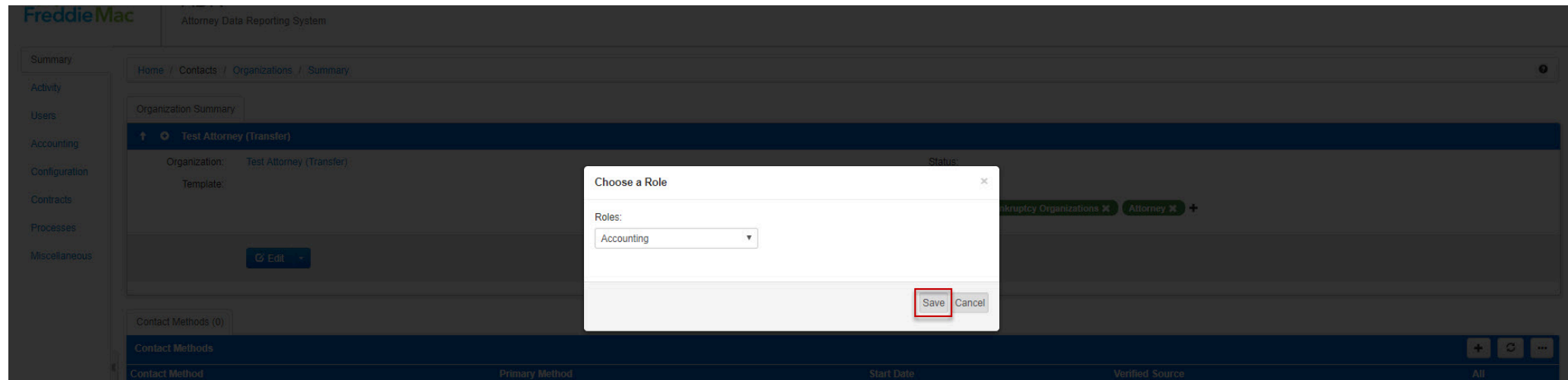
All 0 records shown. 25 rows per page (seconds)

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

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



5. Click Save.



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

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

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

### 1.3 REMOVE A ROLE

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

Users

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

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

3. Select Remove Role from the Options drop down.

Users

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

All 1 records shown. 25 rows per page

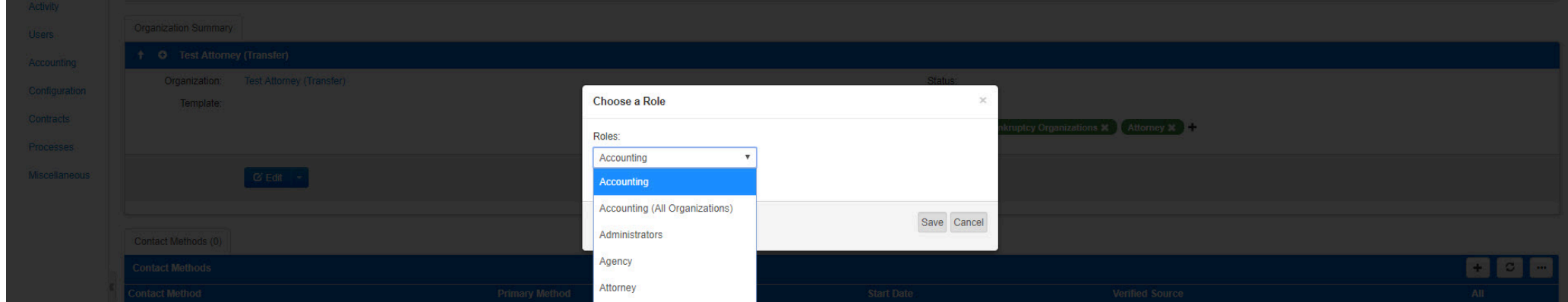
Ledgers [Payment Methods](#)

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

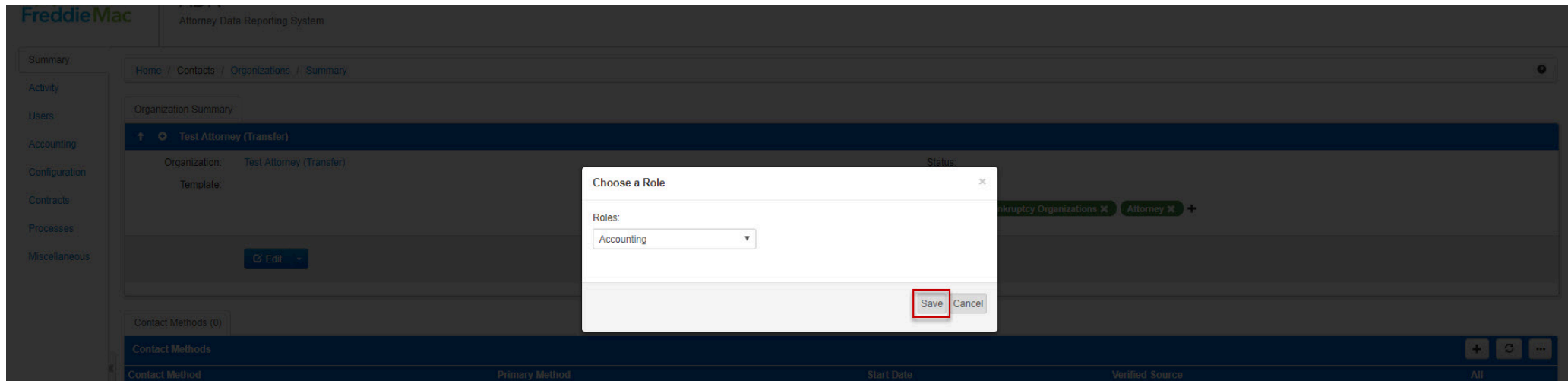
All 0 records shown. 25 rows per page

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

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



5. Click Save.



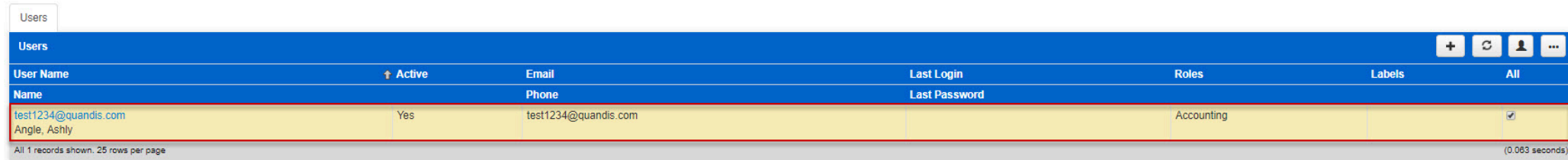
6. The role has been removed.

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

All 1 records shown. 25 rows per page (0.081 seconds)

## 1.4 DEACTIVATE A USER

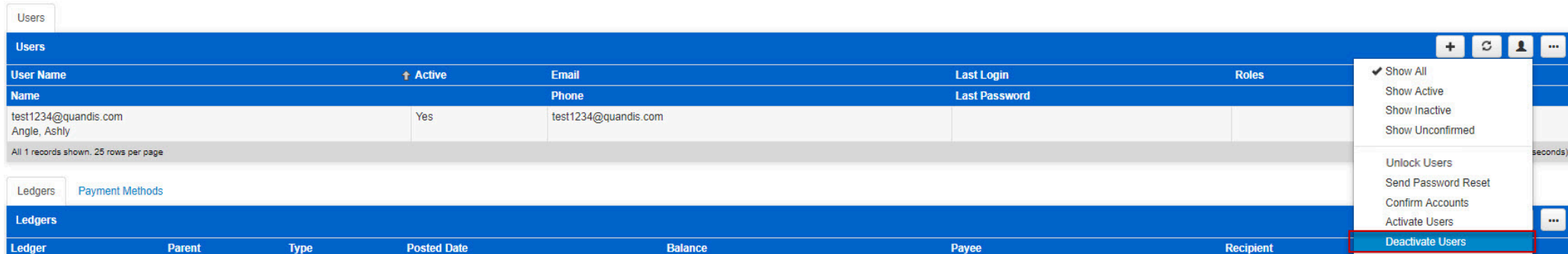
1. Search for the user that needs to be deactivated. (More than one user can be deactivated at a time)
2. Click into the row to highlight the user.



The screenshot shows a table titled "Users" with the following columns: User Name, Active, Email, Last Login, Roles, Labels, and All. The first row is highlighted in yellow and contains the following data: test1234@quandis.com, Yes, test1234@quandis.com, (empty), Accounting, (empty), and a checked checkbox. The table footer indicates "All 1 records shown. 25 rows per page" and "(0.063 seconds)".

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

3. Select Deactivate Users from the Options drop down.



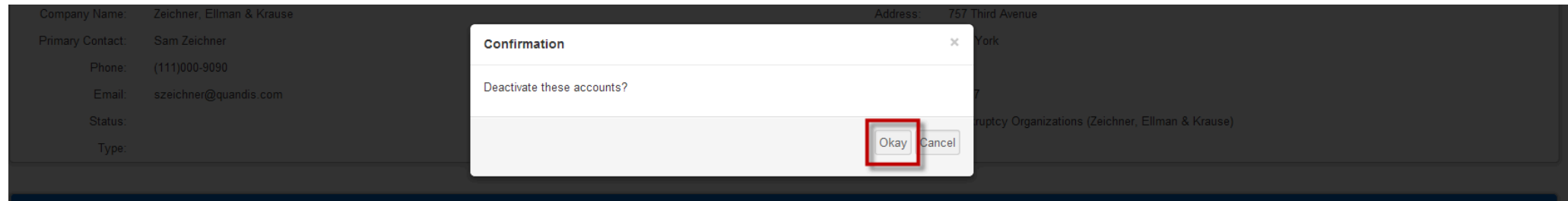
The screenshot shows the same "Users" table as above. A dropdown menu is open over the table, listing several options: Show All (checked), Show Active, Show Inactive, Show Unconfirmed, Unlock Users, Send Password Reset, Confirm Accounts, Activate Users, and Deactivate Users. The "Deactivate Users" option is highlighted with a red box. Below the table, there is a "Ledgers" section with a table header: Ledger, Parent, Type, Posted Date, Balance, Payee, and Recipient.

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

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

Ledger	Parent	Type	Posted Date	Balance	Payee	Recipient
--------	--------	------	-------------	---------	-------	-----------

4. Click Okay in the Confirmation dialogue box.



5. The Active column is No.

Users

User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	No	test1234@quandis.com				<input type="checkbox"/>

All 1 records shown. 25 rows per page (0.059 seconds)

## 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.

Users

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

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

3. Select Unlock Users from the Options drop down.

Users

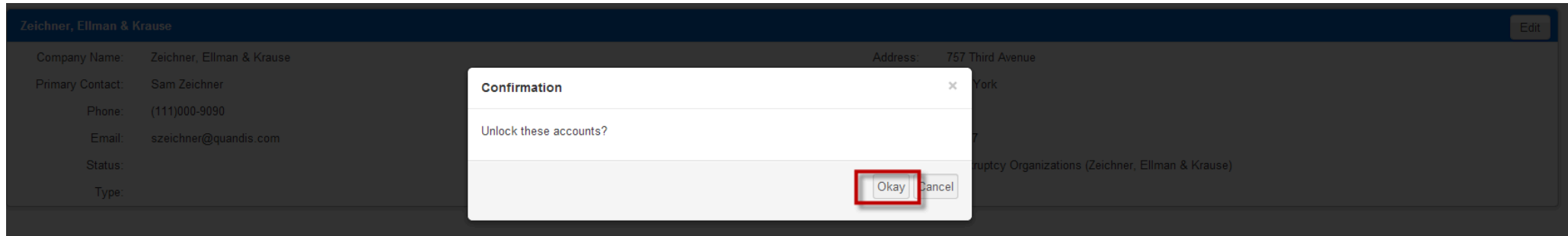
User Name	Active	Email	Last Login	Roles	Labels	All
Name		Phone	Last Password			
test1234@quandis.com Angle, Ashly	Yes	test1234@quandis.com				<input checked="" type="checkbox"/>

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

- ✓ Show All
- Show Active
- Show Inactive
- Show Unconfirmed
- Unlock Users**
- Send Password Reset
- Confirm Accounts

Ledgers Payment Methods

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.

Users

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

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

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

Users

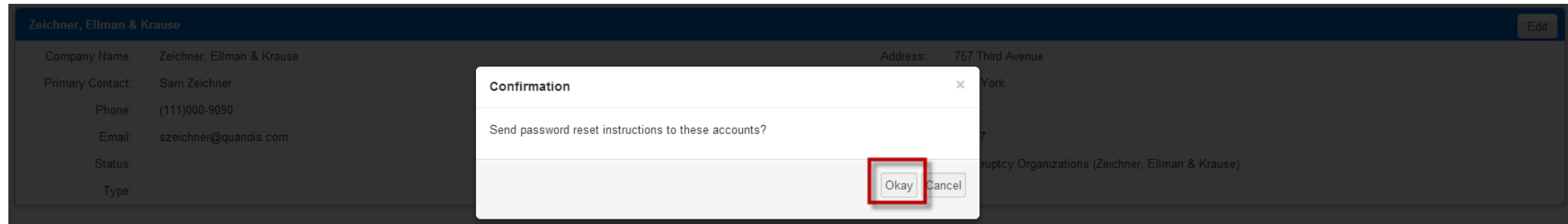
User Name	Active	Email	Last Login	Roles
Name		Phone	Last Password	
test1234@quandis.com Angle, Ashly	Yes	test1234@quandis.com		

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

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

Ledgers Payment Methods

4. Click Okay in the Confirmation dialog box.



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

## 1.7 ADDING A USER TO MULTIPLE ORGANIZATIONS

1. Some users will need to be granted access to multiple Servicers in the ADR system. This is due to factors including subservicing and acquisitions, to name a couple examples, and ADR recognizes each servicer/subservicer as an individual Organization having access to their own list of loans.

2. In this example, the user `tserveric2@quandis.com` is a member of the Wells and Test Servicer organizations.

The screenshot shows the Freddie Mac ADR (UAT) Attorney Data Reporting System interface. The page displays a list of organizations. The table below shows the data for the organizations listed.

Organization	Address	Phone	Type	Labels	All	
	City	State	Postal Code	Email	Status	
SPECIALIZED LOAN SERVICING LLC	8742 Lucent Blvd Highlands Ranch, CO 80129					<input type="checkbox"/>
HOMEWARD RESIDENTIAL, INC.					Servicer Seller	<input type="checkbox"/>

Labels for SPECIALIZED LOAN SERVICING LLC: Loan.ServicerID, QTD Servicer. Labels for HOMEWARD RESIDENTIAL, INC.: Loan.ServicerID.

All 2 records shown. 25 rows per page. (0.797 seconds)

3. Continuing this example, `testservicer2@quandis.com` needs to be added to the HOMEWARD RESIDENTIAL, INC. organization. Select the "HOMEWARD RESIDENTIAL, INC" organization.

FreddieMac ADR (UAT) Attorney Data Reporting System

Home / Contacts / Organizations

Organizations

Organization	Address	Phone	Type	Labels	All
	City State Postal Code	Email	Status		
SPECIALIZED LOAN SERVICING LLC	8742 Lucent Blvd Highlands Ranch, CO 80129			Loan.ServicerID QTD.Servicer	<input type="checkbox"/>
<b>HOMeward RESIDENTIAL, INC.</b>			Servicer Seller	Loan.ServicerID	<input type="checkbox"/>

All 2 records shown. 25 rows per page (0.797 seconds)

4. Locate the "Users" panel on the organization's summary page. To grant this user access, select "Grant Access" from the 'Person' icon drop down of the Users panel.

FreddieMac ADR Attorney Data Reporting System

Home / Support / Logout

Summary

Activity

Users

Accounting

Configuration

Miscellaneous

Contact Methods (0)

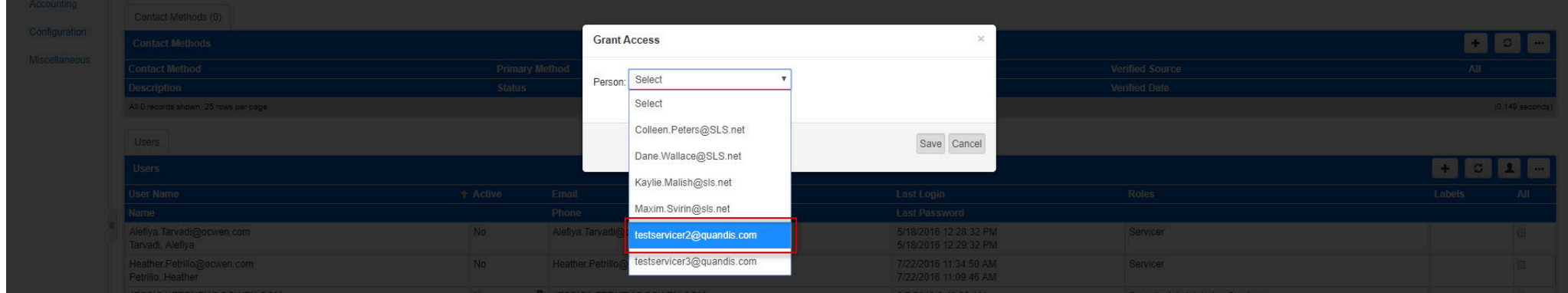
Contact Method	Primary Method	Start Date	Verified Source	All
Description	Status	End Date	Verified Date	
All 0 records shown. 25 rows per page (0.149 seconds)				

Users

User Name	Active	Email	Last Login	Roles
Name		Phone	Last Password	
Alefiya.Tarvadi@ocwen.com Tarvadi, Alefiya	No	Alefiya.Tarvadi@ocwen.com	5/18/2016 12:28:32 PM 5/18/2016 12:29:32 PM	Servicer
Heather.Petrillo@ocwen.com Petrillo, Heather	No	Heather.Petrillo@ocwen.com	7/22/2016 11:34:50 AM 7/22/2016 11:09:46 AM	Servicer
JESSICA.FEENEY@OCWEN.COM Feeney, Jessica	No	JESSICA.FEENEY@OCWEN.COM	8/5/2016 6:40:38 AM 5/18/2016 11:40:09 AM	Security Administrator, Servicer
Nishit.Desai@ocwen.com Desai, Nishit	No	Nishit.Desai@ocwen.com	5/19/2016 6:53:35 AM 5/19/2016 6:18:09 AM	Servicer
Praveen.Gireesh@ocwen.com Gireesh, Praveen	No	Praveen.Gireesh@ocwen.com	5/18/2016 1:42:02 PM 5/18/2016 1:45:13 PM	Servicer
Sam.Dennis@ocwen.com Dennis, Sam	No	Sam.Dennis@ocwen.com	6/20/2016 1:57:20 PM 6/20/2016 1:57:57 PM	Security Administrator, Servicer
srabonita.mukherjee@gmail.com mukherjee, srabonita	No	srabonita.mukherjee@gmail.com		Security Administrator, Servicer

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

5. Select testservicer2@quandis.com from the Grant Access drop down. Select 'Save'.



6. The user testservicer2@quandis.com now appears in the Users panel.

Users						
User Name	Active	Email	Last Login	Roles	Labels	All
Alefiya.Tarvadi@ocwen.com Tarvadi, Alefiya	No	Alefiya.Tarvadi@ocwen.com	5/18/2016 12:28:32 PM 5/18/2016 12:29:32 PM	Servicer		<input type="checkbox"/>
Susan.Macauley@ocwen.com Macauley, Susan	No	Susan.Macauley@ocwen.com	8/5/2016 6:30:36 AM 5/18/2016 12:30:24 PM	Servicer		<input type="checkbox"/>
testservicer2@quandis.com testservicer2@quandis.com	Yes	testservicer2@quandis.com	9/26/2018 10:25:25 AM 5/17/2018 9:56:22 AM	Security Administrator, Servicer		<input type="checkbox"/>

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

### 1.7.1 REMOVING A USER FROM AN ORGANIZATION

1. Select an organization from the "Organizations" page, located under the Contacts drop down.

Home - Support Logout Search 0

FreddieMac ADR (UAT) Attorney Data Reporting System

Home / Contacts / Organizations

Organizations

Organization	Address	Phone	Type	Labels	All
	City State Postal Code	Email	Status		
SPECIALIZED LOAN SERVICING LLC	8742 Lucent Blvd Highlands Ranch, CO 80129			Loan.ServicerID QTD Servicer	<input type="checkbox"/>
<b>HOMEWARD RESIDENTIAL, INC.</b>			Servicer Seller	Loan.ServicerID	<input type="checkbox"/>

All 2 records shown. 25 rows per page (0.797 seconds)

2. Locate the Users panel and click into the row of the user you wish to remove. Select "Revoke Access" from the 'Person' icon drop down of the Users panel.

Home - Support Logout Search 0

FreddieMac ADR (UAT) Attorney Data Reporting System

Summary

Activity

Users

Accounting

Configuration

Miscellaneous

Contact Methods (0)

Contact Method	Primary Method	Start Date	Verified Source	All
Description	Status	End Date	Verified Date	

All 0 records shown. 25 rows per page (0.149 seconds)

Users

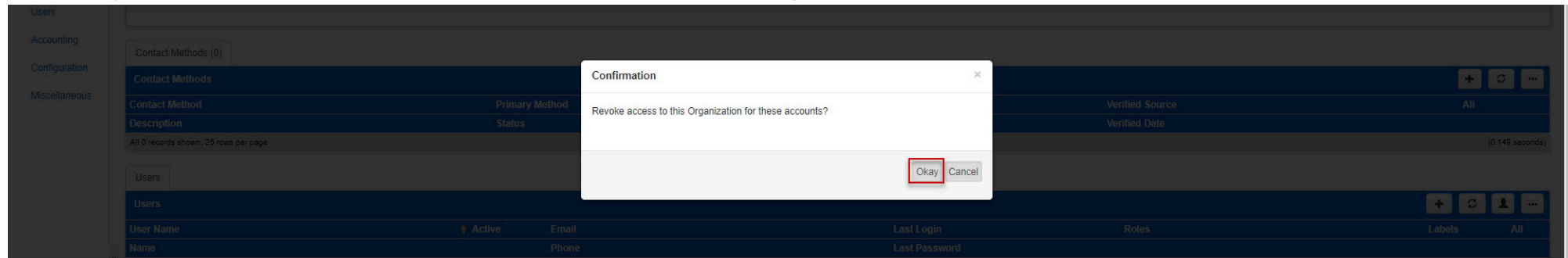
User Name	Active	Email	Last Login	Roles
Name		Phone	Last Password	
Alefiya.Tarvadi@ocwen.com Tarvadi, Alefiya	No	Alefiya.Tarvadi@ocwen.com	5/18/2016 12:28:32 PM 5/18/2016 12:29:32 PM	Servicer
Heather.Petrillo@ocwen.com Petrillo, Heather	No	Heather.Petrillo@ocwen.com	7/22/2016 11:34:50 AM 7/22/2016 11:09:46 AM	Servicer
<b>testservicer2@quandis.com testservicer2@quandis.com</b>	<b>Yes</b>	<b>testservicer2@quandis.com</b>	<b>9/26/2018 10:25:25 AM 5/17/2018 9:56:22 AM</b>	<b>Security Administrator, Servicer</b>

All 10 records shown. 25 rows per page

Ledgers Payment Methods

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

3. Select "Okay" in the Confirmation window. The user has been removed from the organization.



## 1.8 USER RE-CERTIFICATION PROCESS

NOTE: As per Freddie Mac security guidelines, each organization will be required to re-certify user accounts at least once every 6 months. Security Administrators for the organization can certify the user from the organization's profile. Because users are not permitted to re-certify their own account, each organization will need at least 2 Security Administrators for each organization.

1. Security Administrators will receive a daily email notification with a list of users that have not logged into the ADR website for at least 5 months.

----- Forwarded message -----  
From: **Quandis Business Objects** <[no-reply@quandis.com](mailto:no-reply@quandis.com)>  
Date: Thu, Mar 20, 2014 at 11:00 PM  
Subject: ADR System User Re-certification List  
To: [Phelan3@quandis.com](mailto:Phelan3@quandis.com)

Dear Phelan3 Test,

Freddie Mac requires user accounts to be re-certified at least once every 6 months. Users are not permitted to re-certify their own account. The users listed below have were last re-certified more than 5 months ago. If they are not re-certified prior to expiration date listed, their accounts will be deactivated, and they will no longer be able to log into the ADR system. Please refer to the User Guide and Training Videos located in the Support link on the website for instructions on how to re-certify your users.

[integrator@phelanhallinan.com](mailto:integrator@phelanhallinan.com) | [Phelan@quandis.com](mailto:Phelan@quandis.com) | [Phelan2@quandis.com](mailto:Phelan2@quandis.com) |

Thank you.

2. Logged in as a Security Administrator, access the organization where users require re-certification by selecting Organizations under the Contacts drop down.

Freddie Mac ADR (UAT) Attorney Data Reporting System

Home / Loans

Loans

Loans

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

3. Select the organization where users require re-certification.

Freddie Mac ADR (UAT) Attorney Data Reporting System

Home / Contacts / Organizations

Organizations

Organizations

Organization	Address	Phone	Type	Labels	All
	City	State	Postal Code	Email	Status
SPECIALIZED LOAN SERVICING LLC	8742 Lucent Blvd Highlands Ranch, CO 80129				
HOMEWARD RESIDENTIAL, INC.				Servicer Seller	

All 2 records shown. 25 rows per page (0.797 seconds)

4. Locate the “Users” panel and select the corresponding user by clicking the checkbox on the right side of the page. You may select all users and re-certify their accounts at once, but only select “All” if all users require certification (which is confirmed in the email notification).

NOTE: Active users can be sorted by clicking on the column header “Active” with the value “True” on the top of the list.

Users

Users

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

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

5. After selecting the user accounts, select “Confirm Accounts” from the ‘Person’ icon drop down. Select “Okay” in the Confirmation window.

- Summary
- Activity
- Users
- Accounting
- Configuration
- Miscellaneous

[Edit]

Contact Methods (0)

Contact Method	Primary Method	Start Date	Verified Source	All
Description	Status	End Date	Verified Date	
All 0 records shown. 25 rows per page (0.149 seconds)				

Users

User Name	Active	Email	Last Login	Roles
Name	Phone	Last Password		
Alefiya.Tarvadi@ocwen.com Tarvadi, Alefiya	No	Alefiya.Tarvadi@ocwen.com	5/18/2016 12:28:32 PM 5/18/2016 12:29:32 PM	Servicer
Heather.Petrillo@ocwen.com Petrillo, Heather	No	Heather.Petrillo@ocwen.com	7/22/2016 11:34:50 AM 7/22/2016 11:09:46 AM	Servicer
testservicer2@quandis.com testservicer2@quandis.com	Yes	testservicer2@quandis.com	9/26/2018 10:25:25 AM 5/17/2018 9:56:22 AM	Security Administrator, Servicer

All 10 records shown. 25 rows per page

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

6. A confirmation message appears at the top of the page.

7. The user will be sent an email that provides a link to re-certify their account. The user can copy and paste the link provided in the email into their web browser to re-certify.

## Quandis ADR Account Confirmation Request

Inbox x



**Quandis Business Objects** <no-reply@quandis.com>  
to me

8:17 AM (0 minutes ago)



To confirm your account request, for Quandis ADR, copy the URL below and paste it into your browser:

[quandis.net/Security/Login.ashx/ConfirmedAccount?LoginGuid=52885d7c-8d-b64c444f2c6e](http://quandis.net/Security/Login.ashx/ConfirmedAccount?LoginGuid=52885d7c-8d-b64c444f2c6e)

Thank you.

8. The user will receive a message that their account has been confirmed.

9. Security Administrators can confirm if the account has been re-certified by reviewing the daily email notifications that provide the list of users that require re-certification. The users that have been successfully re-certified will not appear in the list on the next day's email list.

10. If the user has not been re-certified by the end of the 6th consecutive inactive month, their account will be deactivated. Security Administrators will need to reactivate the account. Once the account has been reactivated, confirm the account as done through the normal re-certification process. Please review Section 1.1 "Adding Users" for instructions on reactivating an account.

11. If Security Administrators are receiving email notifications that a backup Security Administrator is required, they will need to add the "Security Administrator" role to another user in their organization. Please review Section 1.2 "Adding a Role to a User" for further instructions. Users can confirm there are more than 2 Security Administrators in their organization by not receiving emails with the subject, "ADR System User Re-certification – Backup Security Administrator Needed".

---

## 2 ACCESSING THE SYSTEM

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

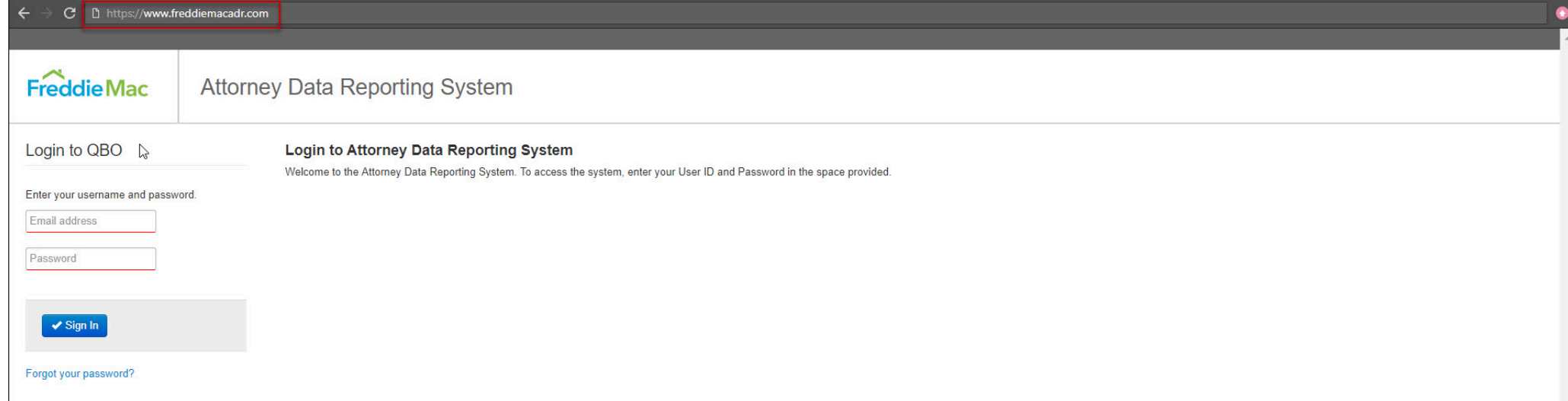
- Internet Explorer 9, 10, and 11
- Google Chrome (Version 25+)
- Firefox (Version 17+)
- Safari (Version 5+)

**\*\*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\*\***

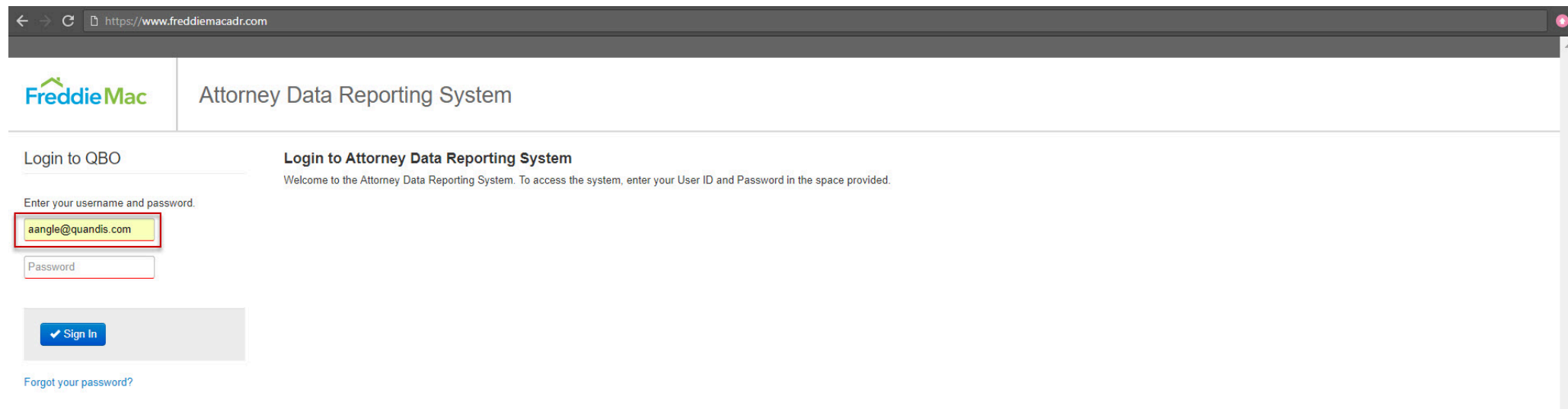
---

### 2.1 LOGGING INTO THE SYSTEM

1. Enter <https://www.freddiemacadr.com> [<https://www.freddiemacadr.com>] 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.

← → ↻ https://www.freddieMacadr.com

**FreddieMac** Attorney Data Reporting System

**Login to QBO**

Enter your username and password.

aangle@quandis.com

\*\*\*\*\*

✓ Sign In

[Forgot your password?](#)

**Login to Attorney Data Reporting System**

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

4. Click Sign In.

← → ↻ https://www.freddieMacadr.com

**FreddieMac** Attorney Data Reporting System

**Login to QBO**

Enter your username and password.

aangle@quandis.com

\*\*\*\*\*

✓ Sign In

[Forgot your password?](#)

**Login to Attorney Data Reporting System**

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

5. You are directed to the Home Page.

Freddie Mac ADR Attorney Data Reporting System

Home / Loans

Loans

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

## 2.2 RESETTING YOUR PASSWORD

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

Freddie Mac Attorney Data Reporting System

Login to QBO

Enter your username and password.

[Forgot your password?](#)

Login to Attorney Data Reporting System

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

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

## Password Reset

Enter your email address.

## Password Reset Instructions

To reset your password follow the instructions below:

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

4. Click Reset

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

## Password Reset Email

**Quandis Business Objects**

to sbob

A password reset request has been issued for your account.

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

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

Thank you.

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

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

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

### 3 LOANS

#### 3.1 LOCATING A LOAN

1. 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. Please note, you will want to be on the Loan Home Page, which you can access by navigating to [Home > Loans](#).

The screenshot shows the Freddie Mac ADR Attorney Data Reporting System interface. At the top right, there is a search field with a dropdown arrow and a '0' next to it. The main header includes the Freddie Mac logo and 'ADR Attorney Data Reporting System'. Below the header, there is a breadcrumb trail 'Home / Loans'. A 'Loans' tab is selected. A table with columns for Loan, Property Address, Borrower, Type, Servicer, Agency, Investor, Position, Next Payment, Labels, and All is visible. The table is currently empty, and a message at the bottom left states 'All 0 records shown. 25 rows per page'.

2. Your search results are presented

The screenshot shows the same Freddie Mac ADR Attorney Data Reporting System interface, but with search results displayed. The search field at the top right now contains the loan number '000169099'. The table below shows one result for loan number '000169099'. The table has columns for Loan, Property Address, Borrower, Type, Servicer, Agency, Investor, Position, Next Payment, Labels, and All. The search results are highlighted with a red border.

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment	
000169099	123 Peony Street Charleston, SC 29407	Peony, James	DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099			\$450,000.00		

All 1 records shown. 25 rows per page (5.004 seconds)

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

Home - Support Logout Search

FreddieMac ADR Attorney Data Reporting System

Home / Loans

Loans

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

4. The loan search panel is expanded.

Home - Support Logout Search

FreddieMac ADR Attorney Data Reporting System

Home / Loans

Loans

Smart Search: 000169099

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount
000169099 0	123 Peony Street Charleston, SC 29407	Peony, James	DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099			\$450,000.00

All 1 records shown. 25 rows per page

**Loan Search**

ID:

Loan:

Address:

City:

State:

Servicer:

Servicer Loan:

Insurer:

Insurer Loan:

Investor:

Investor Loan:

Agency:

Agency Loan:

Pool Number:

Status: Status: (0)

UPB Amount:

Original Balance:

Filters:

- Active
- Active Status
- Can Delete
- Can Insert
- Can Update
- Final Status
- Not Active Closed
- Unread Notifications

Search

5. Enter the loan number in the loan field.

Home - Support Logout Search

FreddieMac ADR Attorney Data Reporting System

Home / Loans

Loans

Smart Search: 000169099

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount
000169099 0	123 Peony Street Charleston, SC 29407	Peony, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099			\$450,000.00

All 1 records shown. 25 rows per page

Loan Search

ID:

Loan:

Address:

City:

State:

Servicer:

Servicer Loan:

Insurer:

Insurer Loan:

Investor:

Investor Loan:

Agency:

6. Click Search.

Home - Support Logout Search

FreddieMac ADR (UAT) Attorney Data Reporting System

Home / Loans

Loans

Smart Search: 000169099

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount
000169099 0	123 Peony Street Charleston, SC 29407	Peony, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099			\$450,000.00

All 1 records shown. 25 rows per page

Loan Search

ID:

Loan:

Address:

City:

State:

Servicer:

Servicer Loan:

Insurer:

Insurer Loan:

Investor:

Investor Loan:

Agency:

Agency Loan:

Pool Number:

Status:

UPB Amount:

Original Balance:

Filters:

- Active
- Active Status
- Can Delete
- Can Insert
- Can Update
- Final Status
- Not Active Closed
- Unread Notifications

Search

7. Your search results are presented.

The screenshot shows the FreddieMac ADR Attorney Data Reporting System interface. The top navigation bar includes links for Home, Support, and Logout, along with a search bar containing the value 000169099. The main content area displays a table of search results for the query 'Smart Search: 000169099'. The table has columns for Loan, Property Address, Borrower, Type, Servicer, Agency, Investor, Position, Next Payment, Labels, and All. The first row is highlighted in red and contains the following data: Loan 000169099, Property Address 123 Peony Street, Charleston, SC 29407, Borrower Peony, James, Type DELINQUENT, Servicer SPECIALIZED LOAN SERVICING LLC, Agency Freddie Mac, Investor Freddie Mac, Position \$450,000.00, and Next Payment Last Payment. The table footer indicates 'All 1 records shown. 25 rows per page' and a loading time of '(5.604 seconds)'.

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment	
000169099 0	123 Peony Street Charleston, SC 29407	Peony, James	DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099		\$450,000.00		Last Payment	

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

The screenshot shows the FreddieMac ADR Attorney Data Reporting System interface. The top navigation bar includes links for Home, Support, VendorScape, and Logout, along with a search bar containing the value Search. The main content area displays a table of search results for the query 'Smart Search: 000031275'. The table has columns for Loan, Property Address, Borrower, Type, Servicer, Agency, Investor, Position, Next Payment, Labels, Loan ID, and All. The first row is highlighted in red and contains the following data: Loan 000031275, Property Address NC, Borrower Mark Bohannon, Type ACTIVE, Servicer NATIONSTAR MORTGAGE LLC, Agency Freddie Mac, Investor Freddie Mac, Position \$21,312,321.00, and Next Payment Last Payment. The table footer indicates 'All 2 records shown. 25 rows per page' and a loading time of '(4.728 seconds)'.

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

## 3.2 REVIEWING A LOAN SUMMARY PAGE

### 3.2.1 SUMMARY SECTION

1. After searching for a loan, you may access the details of the loan by clicking on the blue hyperlink, representative by the loan number, as seen below.

Home / Loans

Loans

Smart Search: 000169099 + ↺ ⌵ ⋮

Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment		
000169099	123 Peony Street			Peony, James	--	SPECIALIZED LOAN SERVICING LLC	Freddie Mac					
0	Charleston, SC	29407			DELINQUENT	46799	000169099		\$450,000.00			

All 1 records shown. 25 rows per page (5.694 seconds)

2. You will be redirected to the “Loan Summary” page which provides Loan related information. Additional loan information is available by expanding the “Loan Summary” panel, which can be triggered by selecting the arrow and “+” icons on the top left corner of the panel.

Summary

Activity

Processes

Home / Loans / Summary

Loan Summary

000169099

Loan:	000169099	Status:	DELINQUENT
Servicer:	SPECIALIZED LOAN SERVICING LLC	Type:	
Servicer Loan ID:	46799	Labels:	

Agency:	Freddie Mac	Equity Position:	
Agency Loan ID:	000169099	Equity Date:	
Investor:		Mortgage Type:	
Investor Loan ID:		Mortgage Description:	
Insurer:		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 SFDMCID:	
Interest Only Term:		MERS Loan ID:	
UPB Amount:	\$450,000.00	Context Identifier Type:	
Next Pymt. Due:		Context Description:	
Last Pymt. Received:		Context Loan ID:	
Interest Paid Through:		LTV Original:	
Interest Calculation:		LTV Current:	
Original Balance:	\$600,000.00	CLTV Original:	
Per Diem:		CLTV Current:	
Payment Amount:		Assumable:	No
Payoff Amount:		Assumable Date:	
Payoff Good Through:		Assumable Term:	
Paid In Full:		Assumed:	No
Total Amount Due:		Assumed Date:	
Late Charge Balance:		Payment History:	
Suspense Balance:		Product:	
Interest Rate Original:		Priority:	0
Late Charge Amount:		Neg. Amortization:	No
Corp. Adv. Balance:		Neg. Amortization Cap:	
Escrow Balance:		Grace Period Days:	
Principal:		Accel. Pymt. Program:	No
Interest:		PITI:	
Taxes:		Stop Codes:	
Insurance:			

Current Beneficiary:		Current Note Contact:	
Original Beneficiary:		Original Note Contact:	

Created Date:	5/24/2013 10:14 PM	Updated Date:	9/11/2018 12:01 PM
---------------	--------------------	---------------	--------------------

[Edit](#)

### 3.2.2 ACTIVITY SECTION

1. The following panels are available within the 'Activity' Section.

- Borrower Panel: This information include borrower information (e.g. address, SSN, name, etc.) as well as type of borrower (primary or secondary).
  - Note: SSN is fully masked
- Loan Data: This panel notes of loan data information
- Related Loans: Lists any related loans

Borrowers (2)		Loan Data	Related Loans (0)								
Borrowers											
Borrower	Loan Number	Property Address			Mailing Address			Phone	Type	Labels	All
SSN		City	State	Postal Code	City	State	Postal Code	Email	Status		
Daffodil, Jane	<input checked="" type="checkbox"/> 000242217	3400 SHADY CREEK ROAD	RICHMOND, VA	23234							<input type="checkbox"/>
Flower, James	<input checked="" type="checkbox"/> 000242217	3400 SHADY CREEK ROAD	RICHMOND, VA	23234							<input type="checkbox"/>

All 2 records shown. 25 rows per page (0.487 seconds)

### 3.2.3 PROCESSES SECTION

1. The following panels are available within the 'Processes' Section

- Bankruptcies: List of Bankruptcies associated with the specific loan, selecting a case number will direct the user to the Bankruptcy Summary page.
- Deficiencies: List of Deficiencies associated with the specific loan, selecting a case number will direct the user to the Deficiency Summary page.
- Foreclosures: List of Foreclosure Files associated with the specific loan, selecting the hyperlink will direct you to the Foreclosure Summary page.

- Titles: List of Titles associated with the specific loan, selecting the hyperlink will direct you to the Title Summary page.
- Valuations: List of Valuations associated with the specific loan.
- Processes: List of Processes associated with the specific loan.

The screenshot displays the Freddie Mac ADR system interface. At the top, there is a navigation bar with 'Home', 'Support', 'Logout', and a search box. The Freddie Mac logo is on the left, and 'ADR Attorney Data Reporting System' is in the center. A sidebar on the left contains 'Summary', 'Activity', and 'Processes' tabs. The main content area shows the 'Loan Summary' for loan number 570648580, which is in a 'CLOSED' status. Below this, there are tabs for 'Borrowers (1)', 'Loan Data', and 'Related Loans (0)'. The 'Borrowers' table lists Michael F. Iavelo as the borrower. At the bottom, there are tabs for 'Bankruptcies (0)', 'Deficiencies (1)', 'Foreclosures (2)', 'Titles (0)', 'Valuations (2)', and 'Processes (2)'. The 'Bankruptcies' table is highlighted with a red border and shows columns for Case #, Servicer, Agency, Debtor, Filing State, Type, Date Opened, Date Closed, Labels, and All.

### 3.2.4 ORDERING A LOAN MODIFICATION / DEED IN LIEU TITLE

**NOTE:** Freddie Mac has initiated a Direct Title Pilot in which Servicers are phased in over a period of time. Servicers will have the capability to order Loan Modification and Deed In Lieu Title Orders as they are phased into the Direct Title Pilot.

Servicers can submit Loan Modification/Deed In Lieu Title Orders using the following methods:

- Quandis Application

- FTP File Drop

### 3.2.4.1 TITLE ORDER VIA QUANDIS APPLICATION

1. Login to <https://www.freddiemactitlesense.com>
2. Navigate to [Home](#) > [Loans](#)
3. Select the desired Loan (hyperlink under Loan column) for which you would like to order a Title.

The screenshot shows the Freddie Mac FMTS Title Sense System interface. The top navigation bar includes 'Home', 'Support', 'Logout', and a search field. The 'Loans' menu item is highlighted in the top navigation bar. Below the navigation bar, the breadcrumb 'Home / Loans' is visible. The main content area displays a table of loans. The loan with ID '000169064' is highlighted in red.

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment	
000154873 0	37529 REDWINE CANYON RD CRESTON, WA 99117	BOYD, TAMARA L BOYD, CHARLES	-- Closed	AGGREGATION VPC (SPECIALIZED LOAN SERVICING AS VPC SERVICER) 1013420128	Freddie Mac 000154873			6/1/2016		<input type="checkbox"/>
000169064 0	2005 BOSTON AVENUE RICHMOND, VA 23224	Darby, Esther C.	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 0001010060727	Freddie Mac 000169064		\$37,950.51	5/1/2014		<input type="checkbox"/>
000169099 0	SC		-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC	Freddie Mac 000169099					<input type="checkbox"/>
000190276 0	13447 SW 154 STREET,#2201 MIAMI, FL 33177	OLARTE, FABIOLA	-- DELINQUENT	AGGREGATION VPC (SPECIALIZED LOAN SERVICING AS VPC SERVICER) 0042103416	Freddie Mac 000190276			2/1/2016		<input type="checkbox"/>

4. Once you are at the **Loan Summary** page, navigate to [Processes > Title Tab](#)

Freddie Mac FMTS Title Sense System

Home / Loans / Summary

Loan Summary

000190276

Loan: 000190276 Status: DELINQUENT

Servicer: AGGREGATION VPC (SPECIALIZED LOAN SERVICING AS VPC SERVICER) Type:

Servicer Loan ID: 0042103416 Labels:

Edit

Borrowers (1) Loan Data Related Loans (0)

Related Loans

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment	
All 0 records shown. 25 rows per page (0.414 seconds)										

Bankruptcies (0) Deficiencies (0) Foreclosures (1) **Titles (0)** Valuations (9) Processes (9)

Titles

Case #	Address	Title Company	Type	Date Opened	Date Closed	Labels	All
Assigned To	City	State	Postal Code	Received Date	Status	Opened Reason	Closed Reason
All 0 records shown. 25 rows per page (0.686 seconds)							

5. Select the '+' symbol. The following product types will appear in the dropdown list. Select the desired product type.

- New Deed In Lieu Title

- New Loan Modification Title

The screenshot shows the FreddieMac FMTS Title Sense System interface. At the top, there is a navigation bar with 'Home', 'Support', and 'Logout' links, along with a search bar and a user indicator '10'. The main header displays the FreddieMac logo and 'FMTS Title Sense System'. On the left, there is a sidebar with 'Summary', 'Activity', and 'Processes' tabs. The main content area shows a 'Loan Summary' for loan ID 000190276, with details: Loan: 000190276, Status: DELINQUENT, Servicer: AGGREGATION VPC (SPECIALIZED LOAN SERVICING AS VPC SERVICER), Type: (blank), Servicer Loan ID: 0042103416, Labels: (blank). Below this is an 'Edit' button. Further down, there are sections for 'Borrowers (1)', 'Loan Data', and 'Related Loans (0)'. The 'Related Loans' table is currently empty. Below that, there are sections for 'Bankruptcies (0)', 'Deficiencies (0)', 'Foreclosures (1)', 'Titles (0)', 'Valuations (9)', and 'Processes (9)'. The 'Titles' section is active, showing a table with columns: Case #, Address, Title Company, Type, Date Opened, Date Closed, and Assigned To. A dropdown menu is open, showing two options: '+ New Deed In Lieu Title' and '+ New Loan Modification Title', which is highlighted with a red box. The table also shows 'Priority', 'City', 'State', 'Zip', 'Status', 'Servicer ID', 'Agency ID', 'Investor ID', 'UPB Amount', and 'Last Payment' columns. The bottom of the table indicates 'All 0 records shown. 25 rows per page' and a loading time of '(0.686 seconds)'.

6. A New Title form will appear. Enter all the required fields. The table below outlines the required fields for a New Title Order. Feel free to enter other data fields if available.

Note:

- \*Only required for Loan Modification w/Signing Service and Deed In Lieu w/Signing Service
- \*\*Only required IF there is a Co-Borrower ('Yes' is selected for Co-Borrower)

Field Name	Description
Title	Name or Title
Template	Product Type

Product Category	Product Type Category (i.e. Deed In Lieu, Deed In Lieu w/Singing Service, Loan Modification, Loan Modification w/Signing Service)
Assigned Organization	Assigned Organization
Servicer	Servicer Name
Servicer Loan ID	Servicer 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
Borrower Phone Number*	Borrower Phone Number
Co-Borrower First Name**	Co-Borrower First Name
Co-Borrower Last Name**	Co-Borrower Last Name

7. Select 'Save' to submit the order or 'Cancel' to exit order. Selecting 'Save' will trigger the Title product order for the selected loan.

**New Title**

Title:  Status:

Template:  Type:

Commitment #:

Received:

Reviewed:

Assoc. Type:

Ownership Type:

Ownership Desc.:

MISMO Version ID:

Vendor Order ID:

Vendor Trans. ID:

Agency Case ID:

Base Loan Amount:

Lender Case ID:

GSE Manner Held:

Insurance Amount:

Policy Effective:

Policy Witness:

Vesting Validation:

Document:

Legal Validation:

Relationship Desc.:

Lien Desc.:

Disbursement:

Leasehold Exp.:

Rights Desc.:

Usage Desc.:

Est. Cash Out Amt.:

Refinance Cash Out:

Mortgage Mod.:

Lender Loan ID:

Original Loan Amt.:

Note:

Title Clearance:

Assigned:

Potential Loss:

**Requested**

Closing Date:

Coverage Amt.:

Product Desc.:

Product Name:

Product Type Desc.:

Product Type:

Product Category:

Action Type:

Service Price Amt.:

Service Due Date:

Borrower Loan Amt.:

**Service**

Est. Price Amt.:

Actual Price Amt.:

Est. Completion:

Actual Completion:

Est. Off Hold:

Cancel Price Amt.:

**Closing**

Agent Order ID:

Document Rcvd.:

Est. Closing:

Scheduled Closing:

Actual 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:

Client: --  
Client Person: --  
Vendor: --  
Vendor Person: --  
Assigned Org.: Specialized Loan Servicing LLC  
Assigned Person: --


Date Opened: 08/28/2018  
Opened Reason: --  
Date Due: --  
Priority: --  
Date Closed: --  
Closed Reason: --

Servicer: Specialized Loan Servicing LLC  
Servicer Loan ID: 325489  
Lien Priority Type: --  
Loan Type: --  
Original Balance: 500,000  
UPB Amount: 350,000  
Deed of Trust  
Filing Date: --  
Recording Date: --  
Property  
Address: 123 Peony Street  
City: Irvine  
State: CA  
Postal Code: 92618  
Deed In Lieu  
Appointment Date: --  
Appointment Time: --

Borrower  
First Name: Jane  
Last Name: Flower  
SSN: XXX-XX-XXXX  
Co-Borrower:  Yes  No  
Non-English Speaker Required:  No  Yes

8. The New Title Order will appear within the Title Tab.

Bankruptcies (0) Bid At Sales (0) Deed In Lieus (0) Deficiencies (0) Foreclosures (3) Loan Modifications (0) **Titles (1)** Valuations (35) Processes (35)

Titles									
Case #	Address			Title Company	Type	Date Opened	Date Closed	Labels	All
Assigned To	City	State	Postal Code	Received Date	Status	Opened Reason	Closed Reason		
<a href="#">1010065638</a>	 448 RUSKIN ROAD AMHERST, NY 14226			ServiceLink 10/11/2018	LoanModification	10/8/2018			<input type="checkbox"/>

All 1 records shown. 25 rows per page (0.459 seconds)

9. The Title Order 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 6 Title Home Page \[#title\]](#)
- **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

### 3.2.4.2 TITLE ORDER VIA FTP FILE DROP

1. Ordering a Title through an FTP File Drop is outline below. Servicer may choose one of the following FTP File drop options outlined below:

\*See sample of predefined column headers (File Format = .xlsx)

	Quandis' FTP Server	Servicer's Internal FTP Server
1.	Drop file into designated folder*	Drop file into internal FTP
2.	Quandis Imports the excel file and process the title order request	Quandis Imports the excel file and process the title order request
3.	Title Company receives order	Title Company receives order
4.	Title Company sends Title product back to Quandis Application AND to Servicer	Title Company sends product to Quandis Application AND to Servicer
5.	Servicer can retrieve through the Quandis Application OR direct retrieval through Title Company	Servicer can retrieve through the Quandis Application OR direct retrieval through Title Company

2. Pay attention to the data type for the following column:

Sample File: [FTP File Drop Example \[https://www.quandis.com/wp-content/uploads/2018/10/UserGuideFTPFileExample.xlsx\]](https://www.quandis.com/wp-content/uploads/2018/10/UserGuideFTPFileExample.xlsx)

- ServicerLoanID\*
- AgencyLoanID\*
- PostalCode\*
- BorrowersPhoneNumber: Required if Product Type = Signing Service (DIL or Loan Mod)
- Attachment (Name of the attachment): Required if Product Type = LoanModificationSigningService only

\*Need to use tick mark (') to ensure that the values are treated like strings and not numbers. The reason for this is that Excel will make the assumption that if the whole string can be interpreted as a number it will truncate leading zeros. So for example, if you enter 004589483 it will be converted to 4589483 if a leading tick mark is not used. In the example attached, you can see the leading tick mark for ServicerLoanID, AgencyLoanID, and PostalCode column.

---

## 4 FORECLOSURE

### 4.1 FORECLOSURE SUMMARY SECTION

1. To access a Foreclosure through the Loan Summary page, select the 'Case #' hyperlink within [Processes Section](#) > [Foreclosure Panel](#). This will navigate you to the Foreclosure Summary Page (see 2).

Home Support Logout Search

FreddieMac ADR Attorney Data Reporting System

Summary Home / Loans / Summary

Activity Processes

Loan Summary

483555398

Loan: 483555398 Status:

Servicer: SPECIALIZED LOAN SERVICING LLC Type:

Servicer Loan ID: 1007634001 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 (0.482 seconds)							

Bankruptcies (0) Deficiencies (0) Foreclosures (1) Titles (0) Valuations (0) Processes (0)

Foreclosures

Case #	Servicer	Agency	Court	Type	Date Opened	Date Closed	Labels	All
Attorney	Loan #	Loan #	Court Case #	Status	Scheduled Sale	Closed Reason		
123614	SPECIALIZED LOAN SERVICING LLC	Freddie Mac		Judicial	9/1/2015			
The Mortgage Law Firm PLC - HI	1007634001	483555398		Open				
All 1 records shown. 25 rows per page (0.301 seconds)								

2. The Summary Section includes the following panels:

**Note:** Select the '+' icon to expand the panel and '-' to collapse the panel

- **Foreclosure Summary Panel:** Provides Foreclosure information

Home Support Logout Search

FreddieMac ADR Attorney Data Reporting System

Summary Home / Foreclosures / Summary

Workflow Documents Processes

Foreclosure Summary Loan Summary

123614

Foreclosure: 123614 Status: Open

Template: Foreclosure Type: Judicial

Labels:

Edit

- **Loan Summary Panel:** Provides Loan related information associated to the Foreclosure

The screenshot displays the Freddie Mac ADR (Attorney Data Reporting System) interface. The top navigation bar includes links for Home, Support, and Logout, along with a search field. The main header shows the Freddie Mac logo and the text 'ADR Attorney Data Reporting System'. A left sidebar contains navigation options: Summary, Workflow, Documents, and Processes. The main content area shows a breadcrumb trail: Home / Foreclosures / Summary. Below this, there are two tabs: 'Foreclosure Summary' and 'Loan Summary', with the latter highlighted in a red box. The 'Loan Summary' panel displays the following information:

Loan:	483555398	Status:	
Service:	SPECIALIZED LOAN SERVICING LLC	Type:	
Service Loan ID:	1007634001	Labels:	

At the bottom of the panel, there is an 'Edit' button with a dropdown arrow.

## 4.2 WORKFLOW SECTION

1. The 'Workflow' Section includes the following panels:

- Tasks
  - Tasks are broken down by the following dates
    - **Estimated Completion:** The date the task is estimated to be completed, based on the timeline template determined by Freddie Mac.
    - **Projected Completion:** The date the task is projected to be completed by the firm. This date is primarily used when the task has passed the Estimated Completion date but has not been completed.
    - **Actual Completion:** The date the task was completed. Firms may only use current or past dates when completing tasks and entering Actual Completion dates.

- A history of each task can be viewed by selecting the 'i' icon beside each corresponding and applicable task.

Task	Type	Status	Estimated	Projected	Actual	Reprojection	Days to Completion	Updated Date	Updated By
File Received	Attorney Step Complete		9/2/2015	9/2/2015	9/1/2015		-1	11/1/2015	kadurham@mtglawfirm.com
Complaint Filed	Attorney Step Started		10/2/2015	12/17/2015				11/1/2015	kadurham@mtglawfirm.com
Service of Process Completed	Attorney Step		12/1/2015	2/15/2016					
Motion for Summary Judgment and Decree of FC Filed	Attorney Step		1/10/2016	3/26/2016					
Confirmation of Sale	Attorney Step		4/19/2016	7/4/2016					
Deed Recorded	Attorney Step		5/19/2016	8/3/2016					
Foreclosure Case Closure	Attorney Step		6/18/2016	9/2/2016					

- Holds

- Provides an in-depth look at any current, active or previously closed Holds this file may have.

Home / Foreclosures / Summary

On Hold for Bankruptcy Ch 11. Followup scheduled for 10/09/2018.

Foreclosure Summary | Loan Summary

11-02938

Foreclosure: 11-02938  
Template: Foreclosure

Status: Closed  
Type:  
Labels:

Edit

Tasks | **Holds (1)**

Workflow Hold	Workflow	Type	Start	End	Created
Bankruptcy Ch 11	Freddie FL Judicial Foreclosure	Status	Projected	Days	Updated
Bankruptcy Ch 11			10/9/2018	0	10/9/2018 6:51 PM by aangle
			10/9/2018		10/9/2018 6:51 PM by aangle

## 4.3 DOCUMENTS SECTION

1. The 'Documents' Section lists any documents associated with the Foreclosure.

Documents (1)

Documents						
Document	Type	Checked Out	Created	Labels	All	
Template	Status	Checked In	Updated			
Property Information Report.ID0ER.pdf			10/9/2018 6:57 PM by testserver2 10/9/2018 6:57 PM by testserver2			<input type="checkbox"/>

All 1 records shown. 25 rows per page (0.089 seconds)

## 4.4 PROCESSES SECTION

1. The 'Processes' Section includes the following panels"

- Related Processes: Lists any Processes associated the to Foreclosure.
- Title: Lists any Titles associated to the Foreclosure.
- Valuations: Lists any Valuations associated to the Foreclosure

Related Processes Title (0) Valuations (0)

Processes						
Process	Type	Client	Assigned To	Opened	Labels	All
Template	Status	Vendor	Due	Closed		
399311998	BPO - Exterior/Curbside			8/29/2014		<input type="checkbox"/>
399311998	Auto Val - Exterior/Curbside			5/30/2014		<input type="checkbox"/>
399311998	Auto Val - Exterior/Curbside			1/13/2014		<input type="checkbox"/>
<a href="#">13-13232</a> Foreclosure	Judicial Open	Homeward Residential, Inc. Robertson, Anschutz & Schneid, P.L. - FL		1/17/2009		<input type="checkbox"/>

All 4 records shown. 25 rows per page (cached 09 Oct 18:51)

## 5 BANKRUPTCIES

### 5.1 BANKRUPTCY SUMMARY SECTION

1. To access a Bankruptcy through the Loan Summary page, select the 'Case #' hyperlink within [Processes Section > Bankruptcies Panel](#). This will navigate you to the Bankruptcy Summary Page (see 2).

Summary

Activity

Processes

Home / Loans / Summary

Loan Summary

010691693

Loan: 010691693 Status: Active

Servicer: SPECIALIZED LOAN SERVICING LLC Type:

Servicer Loan ID: 1007671213 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 (0.434 seconds)							

Bankruptcies (5) Deficiencies (0) Foreclosures (0) Titles (0) Valuations (1) Processes (1)

**Bankruptcies**

Case #	Servicer	Agency	Debtor	Filing State	Type	Date Opened	Date Closed	Labels	All
Attorney	Loan #	Loan #	Co-Debtor	Chapter	Status	Opened Reason	Closed Reason		
010691693	McCurdy & Candler, L.L.C. - GA		Doffice Johnson Kathy Johnson	GA 13	MFR	10/20/2009			<input type="checkbox"/>
08-28733	McCurdy & Candler, L.L.C. - GA		Doffice Johnson Kathy Johnson	GA 13	POC	12/10/2008	3/27/2009		<input type="checkbox"/>
08-28733	McCurdy & Candler, L.L.C. - GA		Doffice Johnson Kathy Johnson	GA 13		4/24/2012	3/26/2014 Bankruptcy Discharged		<input type="checkbox"/>
08-28733	McCurdy & Candler, L.L.C. - GA		Doffice Johnson Kathy Johnson	GA 13	MFR	10/20/2009	6/19/2012		<input type="checkbox"/>
08-28733	McCurdy & Candler, L.L.C. - GA		Doffice Johnson Kathy Johnson	GA 13	MFR	1/16/2009	11/17/2009		<input type="checkbox"/>
All 5 records shown. 25 rows per page (0.541 seconds)									

2. The Summary Section includes the following panels:

**Note:** Select the '+' icon to expand the panel and '-' to collapse the panel

- **Bankruptcy Summary Panel:** Provides Bankruptcy information

Home
Support
Logout

Search

2

## ADR

Attorney Data Reporting System

Summary

Workflow

Documents

Processes

Home / Bankruptcies / Summary

Bankruptcy Summary

Loan Summary

↑ 1007635479

Bankruptcy: <a href="#">1007635479</a>	Status: Open
Template: Motion For Relief	Type:
	Labels:

✎ Edit

Tasks (3)   Holds (0)

Bankruptcy Tasks (include Projections)
+
↺
📄
⋮

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
	Status				Days to Completion	Updated By	
File Received	Attorney Step Complete	3/21/2014	3/21/2014	3/26/2014	5	3/26/2014 danielle-y@litlepa.com	
Relief from Stay/Discharge	Attorney Step Started	6/19/2014	6/19/2014			3/26/2014 danielle-y@litlepa.com	
Bankruptcy Case Closure	Attorney Step	6/20/2014	6/20/2014				

All 3 records shown. 25 rows per page (1.138 seconds)

- **Loan Summary Panel:** Provides Loan information associated with the Bankruptcy

The screenshot displays the Freddie Mac ADR Attorney Data Reporting System interface. At the top, there is a navigation bar with 'Home', 'Support', and 'Logout' links, along with a search bar and a notification icon showing '3'. The main header includes the Freddie Mac logo and the text 'ADR Attorney Data Reporting System'. A left sidebar contains navigation options: 'Summary', 'Workflow', 'Documents', and 'Processes'. The main content area shows a breadcrumb trail 'Home / Bankruptcies / Summary' and a yellow notification banner: 'On Hold for BK Freddie Mac Designated Counsel. Followup scheduled for 10/09/2018.' Below this, there are tabs for 'Bankruptcy Summary' and 'Loan Summary', with the latter being selected and highlighted with a red box. The 'Loan Summary' panel displays details for loan 505521288, including 'Loan: 505521288', 'Servicer: 1007635479', 'Status: CLOSED', 'Type:', and 'Labels:'. An 'Edit' button is visible below the details. At the bottom, there is a 'Workflow Holds' section with a table showing one hold record.

**Workflow Holds**

Workflow Hold	Workflow	Type	Start	End	Created	All
BK Freddie Mac Designated Counsel	Motion For Relief	Status	Projected	Days	Updated	
BK Freddie Mac Designated Counsel			10/9/2018		10/9/2018 7:03 PM by aangle	
			10/9/2018	0	10/9/2018 7:03 PM by aangle	

All 1 records shown. 25 rows per page (0.106 seconds)

## 5.2 WORKFLOW SECTION

1. The 'Workflow' Section includes the following panels:

- Tasks: The tasks panel will provide the current status of the tasks workflow along with details of each step.

Home
Support
Logout

2

## ADR

Attorney Data Reporting System

Summary / Home / Bankruptcies / Summary

Summary

Workflow

Documents

Processes

Bankruptcy Summary
Loan Summary

↑ 1007635479

Bankruptcy: 1007635479      Status: Open

Template: Motion For Relief      Type:

Labels:

[Edit](#)

Tasks (3)
Holds (0)

Bankruptcy Tasks (include Projections) + ↻ 🗑️ ⋮

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
	Status				Days to Completion	Updated By	
File Received	Attorney Step Complete	3/21/2014	3/21/2014	3/26/2014	5	3/26/2014 danielle-y@littlepa.com	
Relief from Stay/Discharge	Attorney Step Started	6/19/2014	6/19/2014			3/26/2014 danielle-y@littlepa.com	
Bankruptcy Case Closure	Attorney Step	6/20/2014	6/20/2014				

All 3 records shown. 25 rows per page (1.138 seconds)

Documents (0)

Documents + ↻ 🗑️ ⋮

Document	Type	Checked Out	Created	Labels	All
Template	Status	Checked In	Updated		

All 0 records shown. 25 rows per page (0.355 seconds)

- Holds: Provides an in-depth look at any current, active or previously closed Holds this file may have.

FreddieMac ADR Attorney Data Reporting System

Home Support Logout Search

Summary Workflow Documents Processes

Home / Bankruptcies / Summary

On Hold for BK Freddie Mac Designated Counsel. Followup scheduled for 10/09/2018.

Bankruptcy Summary Loan Summary

505521288

Loan: 505521288 Status: CLOSED  
 Servicer: Type:  
 Servicer Loan ID: 1007635479 Labels:

Edit

Tasks Holds (1)

Workflow Holds

Workflow Hold	Workflow	Type	Start	End	Created	All
Template	Status	Projected	Days	Updated		
BK Freddie Mac Designated Counsel	Motion For Relief		10/9/2018		10/9/2018 7:03 PM by aangle	
BK Freddie Mac Designated Counsel			10/9/2018	0	10/9/2018 7:03 PM by aangle	

All 1 records shown. 25 rows per page (0.106 seconds)

### 5.3 DOCUMENTS SECTION

1. The 'Documents' Section lists any documents associated with the Bankruptcy.

Documents (1)

Documents

Document	Type	Checked Out	Created	Labels	All
Template	Status	Checked In	Updated		
Property Information Report.ID0ER.pdf			10/9/2018 6:57 PM by testservicer2 10/9/2018 6:57 PM by testservicer2		

All 1 records shown. 25 rows per page (0.089 seconds)

## 5.4 PROCESSES SECTION

1. The 'Processes' Section includes the following panel

- Related Processes

Process	Type	Client	Assigned To	Opened	Labels	All
Template	Status	Vendor	Due	Closed		
505521288	BPO - Exterior/Curbside			11/3/2014		<input type="checkbox"/>
505521288	Auto Val - Exterior/Curbside			10/21/2014		<input type="checkbox"/>
<a href="#">284.005104</a> Foreclosure	<input checked="" type="checkbox"/> Judicial Closed	Little, Bradley & Nesbitt, P.A. - NM		5/16/2013 3/10/2015		<input type="checkbox"/>
505521288 Repurchase	<input checked="" type="checkbox"/> Closed			1/12/2009		<input type="checkbox"/>

All 4 records shown. 25 rows per page (cached 09 Oct 19:01)

## 6 TITLE HOME

Servicers 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](#)]

### 6.1 TITLE DASHBOARD

1. Navigate to [Home](#) > [Titles](#) to navigate to the Title Home page

The screenshot displays the Freddie Mac FMTS Title Sense System interface. At the top, there is a navigation bar with links for Home, Support, and Logout, along with a search bar and a user count of 0. The main header includes the Freddie Mac logo and the text 'FMTS Title Sense System'. Below the header, there is a breadcrumb trail 'Home / Titles'. The interface is divided into two main sections: 'Dashboard' and 'Titles'.

The 'Dashboard' section features a 'Assigned Organization' table with a 'Count' column. A filter input field is present above the table. The table lists several organizations and their corresponding counts:

Assigned Organization	Count
--	44
Test Attorney O'Toole	2
BWW Law Group, LLC - MD	1
Gray & Associates, L.L.P. - WI	1
Sirote & Permutt, P.C. - AL	1
Shapiro & Ingle, LLP - NC	3
Randall S. Miller & Associates, PC - MI	2
Trott Law, P.C. - MI	3

The 'Titles' section displays a table with the following columns: Case #, Address, Title Company, Type, Date Opened, Date Closed, Labels, and All. The 'Address' column is further divided into 'City', 'State', and 'Postal Code'. The 'Date Opened' column is further divided into 'Received Date', 'Status', 'Opened Reason', and 'Closed Reason'. The table is currently empty, showing 'All 0 records shown. 25 rows per page'.

2. The first panel displays the Title Dashboard, you can perform the following functions within this panel:

- 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"

Home Support Logout Search

FreddieMac FMTS Title Sense System

Home / Titles

Dashboard

Assigned Organization

Filter

- Test Attorney O'Toole
- BWW Law Group, LLC - MD
- Gray & Associates, L.L.P. - WI
- Sirote & Permutt, P.C. - AL
- Shapiro & Ingle, LLP - NC
- Randall S. Miller & Associates, PC - MI
- Trott Law, P.C. - MI

- By Assigned Organization
- By Assigned Person
- By Association Type Description
- By Client
- By Client Person
- By Closed Reason
- By MERS Registration Status Type
- By Applies To
- By Opened Reason
- By Ownership Type
- By Ownership Type Description
- By Process Template
- By Type

Home Support Logout Search

FreddieMac FMTS Title Sense System

Home / Titles

Dashboard

Assigned Organization

Filter

- Test Attorney O'Toole
- BWW Law Group, LLC - MD
- Gray & Associates, L.L.P. - WI
- Sirote & Permutt, P.C. - AL
- Shapiro & Ingle, LLP - NC
- Randall S. Miller & Associates, PC - MI
- Trott Law, P.C. - MI

	Count
	83
Test Attorney O'Toole	2
BWW Law Group, LLC - MD	1
Gray & Associates, L.L.P. - WI	1
Sirote & Permutt, P.C. - AL	1
Shapiro & Ingle, LLP - NC	3
Randall S. Miller & Associates, PC - MI	2
Trott Law, P.C. - MI	3

## 6.2 TITLE LIST

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

Home / Titles

Dashboard

Shapiro & Kreisman, LLC - MO	1
Samuel I. White, P.C. - WV	2
Rose L. Brand & Associates, P.C. - NM	1
Jauregui & Lindsey, LLC - AL	1
Anselmo Lindberg & Associates, LLC - OH	7
<b>SPECIALIZED LOAN SERVICING LLC</b>	1
Zieve, Brodnax & Steele, LLP - CA	4
Zieve, Brodnax & Steele, LLP - NV	3
Zieve, Brodnax & Steele, LLP - WA	3
TMLF Hawaii LLLC - HI	1
Randall S. Miller & Associates, LLC - WI	2

(0.077 seconds)

Titles

All Titles: Assigned Organization = SPECIALIZED LOAN SERVICING LLC

Case #	Address	Title Company	Type	Date Opened	Date Closed	Labels	All
Assigned To	City State Postal Code	Received Date	Status	Opened Reason	Closed Reason		
PROD_TestLM.20180928 SPECIALIZED LOAN SERVICING LLC	6642 E Baseline Rd Mesa, MD 85206	Title365	Open	9/28/2018			<input type="checkbox"/>

All 1 records shown. 25 rows per page

(0.297 seconds)

### 6.3 TITLE ORDER CANCELLATION

Servicer can cancel a title order as outlined below:

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

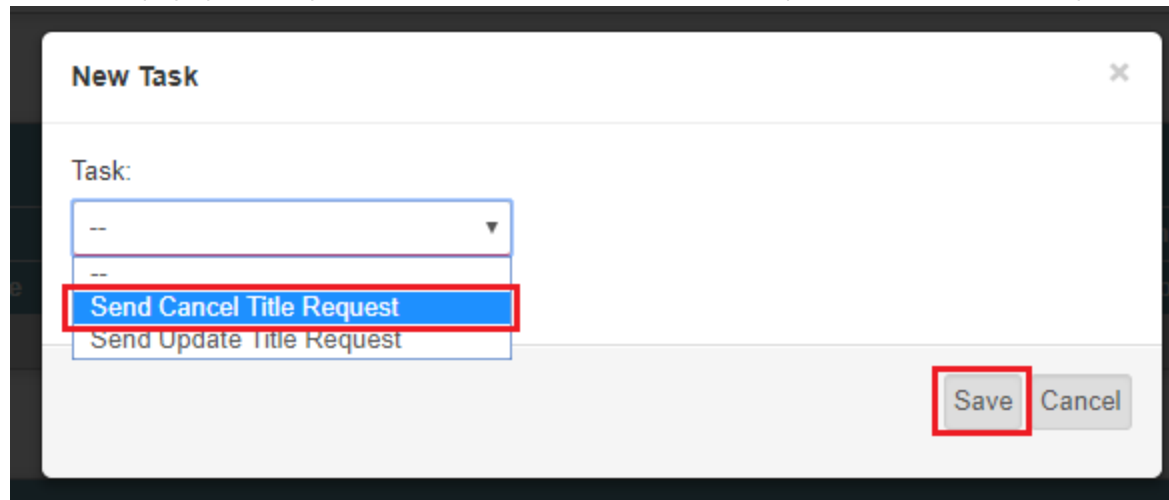
Tasks (0) Holds (0)

Task	Type	Estimated	Projected	Actual	Reprojection	Update	All
	Status				Days to Completion	Update	
							<div style="border: 1px solid red; padding: 2px;">+ New Task</div> <div style="border: 1px solid gray; padding: 2px;">+ New Request</div>

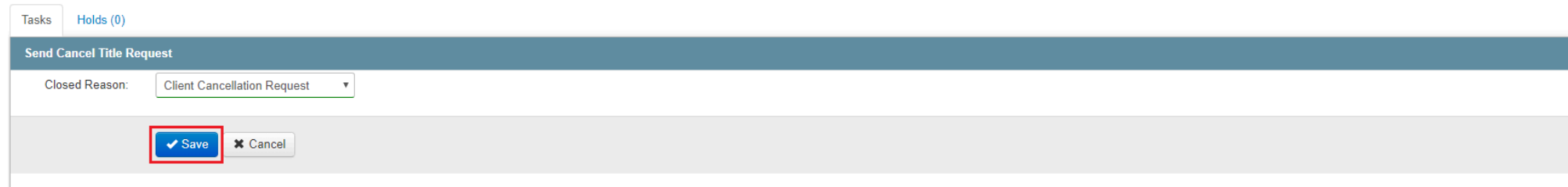
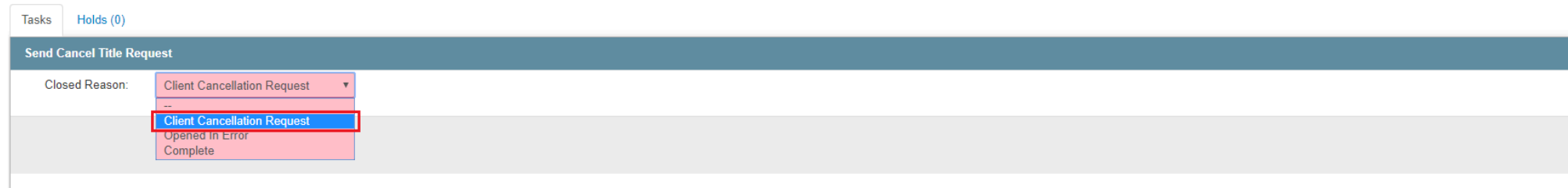
All 0 records shown. 25 rows per page

(1.414 seconds)

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



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



Tasks (1) Holds (0)

Title Tasks

Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All
	Status				Days to Completion	Updated By	
Send Cancel Title Request	Ad-hoc	3/21/2019		3/20/2019		0	<input type="checkbox"/>

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

\*Note: Titles cannot be cancelled after Product has been received. If Product has already been received, it will be indicated within the Task Edit screen, and the user

will only be able to click "Cancel".

Tasks Holds (0)

Send Cancel Title Request

Title cannot be cancelled after product has been received.

✕ Cancel

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

### 6.3.1 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:

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

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

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

Title Summary Loan Summary

↑ 050208985

Title: 050208985 Status: Canceled

Template: Foreclosure Title Type: Foreclosure

Labels:

Vendor: Date Due: 2/27/2019

Vendor Person: Priority:

Assigned Org.: Date Closed: 2/25/2019

Assigned Person: Closed Reason: CANCEL/NO BILL

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

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

## 6.4 TITLE SUMMARY PAGE

Listed below are the functions throughout the Title Summary page:

1. View Title, Property, and Loan Summary panels

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

- : Add a new Public Record/Transaction
- : Refresh Public Records/Transactions panel
- : View Public Records/Transactions by various filters
- : Export details of Public Records/Transactions to CSV or Excel

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

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

- : Add a new Task/Hold

: Refresh Task/Hold panel

: View Task/Hold by various filters

: Export details of Task/Hold to CSV or Excel

Tasks (0) Holds (0)

Title Tasks								+   ↻   🗑️   ⋮
Task	Type	Estimated	Projected	Actual	Reprojection	Updated Date	All	
Status					Days to Completion	Updated By		
All 0 records shown. 25 rows per page								

(1.038 seconds)

4. View Messages Panel and perform the following functions

: Add New Message

: Refresh Message panel

: View Messages by various filters

: Export details of Messages to CSV or Excel

Messages (3)

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

All 3 records shown. 25 rows per page

(0.209 seconds)

5. View Documents Panel and perform the following functions

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

: Add New Document, New folder, or Bulk Upload

: Refresh Documents panel

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

: Export details of Documents to CSV or Excel

Documents (2)

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

All 2 records shown. 25 rows per page (0.082 seconds)

6. View Processes Panel and perform the following functions

: Servicer does not have permission to add Related Processes

: Refresh Related Processes panel

: View Related Processes by various filters

: Export details of Related Processes to CSV or Excel

Related Processes (3)

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

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

## 6.5 TITLE PRODUCT RETRIEVAL

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

1. Select hyperlink to download document

Documents (2)

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

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

## 6.5.1 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. The Bene-Check document can be found in the same location as the Product documents, and will be appropriately labeled (labeling may vary between Title Vendors).

Documents (5)

Document	Type	Checked Out	Created	Labels	All
Template	Status	Checked In	Updated		
Property Information Report Title Product			2/26/2019 2:23 PM by qtdapi 2/26/2019 2:23 PM by qtdapi		<input type="checkbox"/>
Property Information Report Title Product			2/26/2019 10:33 AM by qtdapi 2/26/2019 10:33 AM by qtdapi		<input type="checkbox"/>
Property Information Report Title Product			2/26/2019 10:33 AM by qtdapi 2/26/2019 10:33 AM by qtdapi		<input type="checkbox"/>
Bene Check Search Package Title Supplemental			2/22/2019 10:47 AM by qtdapi 2/22/2019 10:47 AM by qtdapi		<input type="checkbox"/>
Property Information Report Title Product			11/1/2018 11:06 AM by qtdapi 11/1/2018 11:06 AM by qtdapi		<input type="checkbox"/>

All 5 records shown. 25 rows per page (0.415 seconds)

## 6.6 TITLE UPDATE REQUESTS

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

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

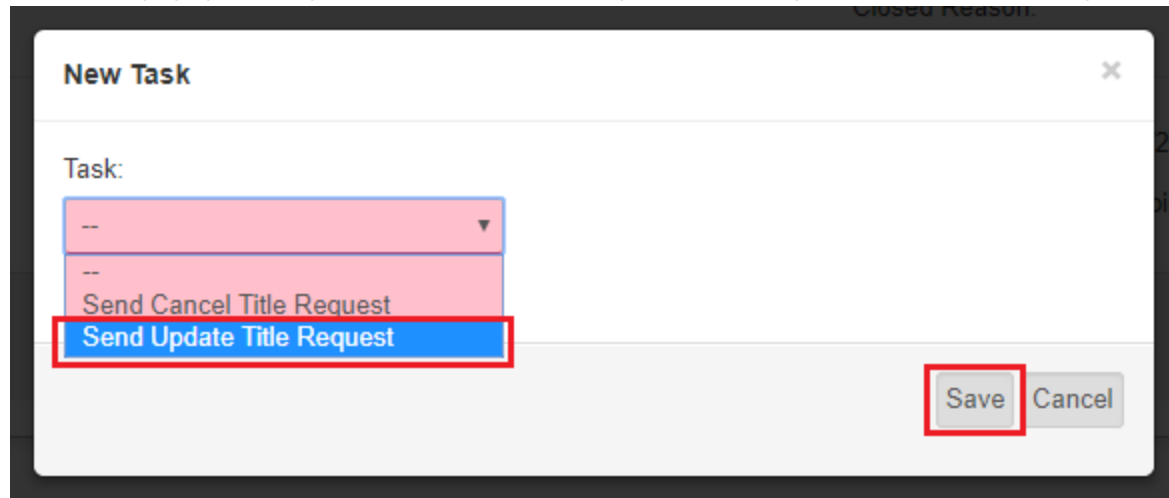
Tasks (0) Holds (0)

Task	Type	Estimated	Projected	Actual	Reprojection	Update	All
Status					Days to Completion	Update	
							<input type="checkbox"/>

All 0 records shown. 25 rows per page (0.072 seconds)

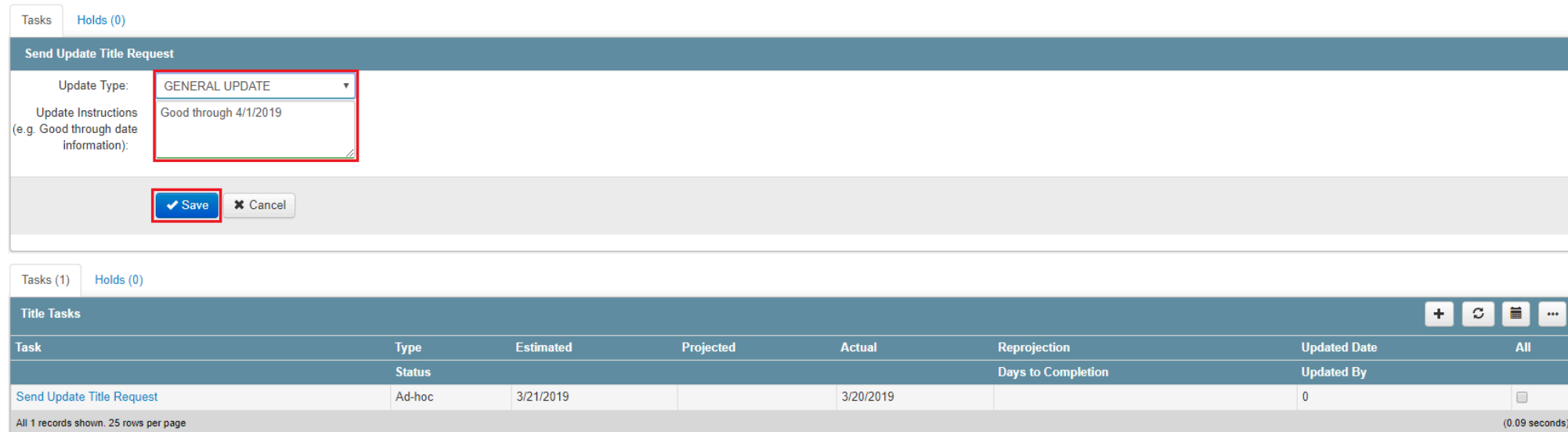
+ New Task  
+ New Request

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

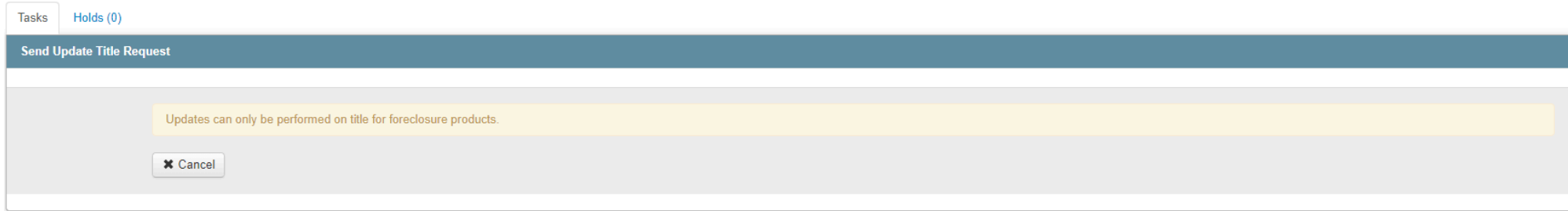


4. Select an Update Type from the dropdown menu, then enter the Instructions for this Update, including the Good Through Date, if applicable, then click "Save".

**\*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.

## 6.7 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”.

Messages

### New Message

Message:  Status: --

Template:  Type: --

Date Added:  Select the Template prior to editing the Message field Priority: Normal

From: testattorney1@quandis.com Secure Delivery:  Yes  No

To:

Body:

Attachments: Drag-and-drop documents here to add as attachments to this message.

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

Messages (1)

Messages + ↺ ✉ ⋮

Quick Message

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

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

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

The screenshot shows a web interface for a Messages panel. At the top, there is a header with "Messages (2)" and a "Messages" title. Below the header is a search bar labeled "Quick Message". The main area contains a table of messages with columns for "Message", "Date Added", "Type", and "Status". The first message is titled "Title Delayed" and "Title Data", with a date of "6/25/2019 11:06 AM" and a "From Address" of "qtdapi@quandis.com". The message body contains the text: "Thank you for your inquiry. This Title Order has been delayed due to County offices being closed. The expected completion date is 6/31/2019." The second message is titled "Order Inquiry" and "Order Inquiry", with a date of "6/25/2019 10:59 AM" and a "From Address" of "testattorney1@quandis.com". The message body contains the text: "Please provide the status of the Title Order request sent on 6/20/19. Thank you." and a link "user@firm.com". A context menu is open over the first message, showing options: "Toggle Detail", "Mark Read", "Mark Unread", "Show Active", "Show Active Status", "Show Can Delete", "Show Can Insert", "Show Can Update", "Show Final Status", "Show Information Only", "Show Sent", "Show Template Extranet", "Show Unread", and "Show Unread Notifications".

## 7 EXPORT LIST TO EXCEL OR CSV

1. You may export your results to Excel, along with any section that has an available list (Borrower Data, Bankruptcy files, Foreclosures, etc). The example below will be exporting a list of loans. Navigate to [Home](#) > [Loans](#) and update desired row count (25 rows per page by default) to view, this example was updated to '10 rows per page'. Keep in mind that while this is only an example, many of your desired results will contain similarities which you can search by, using this logic and search



Home / Loans

Loans

Loans												
Loan	Property Address			Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	Labels	All
Priority	City	State	Zip		Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment		
000005428	3951 SW 51 ST FT LAUDERDALE, FL 33312			Black, Jeff HENRYRKER, JAMES	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 0001149662	Freddie Mac 000005428		1 \$18,853.61			<input type="checkbox"/>
000169064 0	2005 BOSTON AVENUE RICHMOND, VA 23224			Darby, Esther C. Last, First	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 0001010060727	Freddie Mac 000169064		\$37,950.51	5/1/2014		<input type="checkbox"/>
000169099 0	123 Peony Street Charleston, SC 29407			Peony, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099		\$450,000.00			<input type="checkbox"/>
000232092 0	191 ELEMENTARY DRIVE MARTINSBURG, WV 25404			Pangle, Virginia 123, test	-- --	SPECIALIZED LOAN SERVICING LLC 1010060714	Freddie Mac 000232092		\$100,700.25	4/1/2014		<input type="checkbox"/>
000236039 0	123 Cliff Street Jacksonville, FL 32201			Cliff, Jewel L, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 464651	Freddie Mac 000236039		\$350,000.00			<input type="checkbox"/>
000236233 0	123 Orchid Street Tampa, FL 33601			Flower, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 56478	Freddie Mac 000236233		\$198,000.00			<input type="checkbox"/>
000237000 0	278 Peach Tree Cir Atlanta, GA 30301			Moss, Kate Last, First	Conventional-No PMI --	SPECIALIZED LOAN SERVICING LLC 000237000	Freddie Mac 000237000		\$198,000.00			<input type="checkbox"/>
000237094 0	308 HIGHLAND TR. LADY LAKE, FL 32159			ALEXANDER, FREDERICA A ALEXANDER, FREDERICA A	PMI DELINQUENT	SPECIALIZED LOAN SERVICING LLC 0201051661	Freddie Mac 000237094		1	4/1/2018		<input type="checkbox"/>
000238295 0	7016 Hollyberry Rd Roanoke, VA 24018			Johnson, Jimmy	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 000238295	Freddie Mac 000238295		\$189,000.00			<input type="checkbox"/>
000239283 0	454 HANOVER ROAD SCOTLAND, CT 06264			TEster, TEst	-- --	SPECIALIZED LOAN SERVICING LLC 1010060688	Freddie Mac 000239283		\$189,000.00	12/1/2013		<input type="checkbox"/>

500+ records: showing page 1 of 50. 10 rows per page. Go to page 1 2 3 4 5 6 7 8 9 10 ... 50.

(4.46 seconds)

2. To export the results to CSV or Excel select 'Export to CSV' or 'Export to Excel' within the "..." dropdown.

The screenshot shows the FreddieMac ADR Attorney Data Reporting System interface. At the top, there is a navigation bar with 'Home', 'Support', and 'Logout' links, along with a search bar. Below this, the 'Loans' section is active, displaying a table of loan records. A context menu is open over the table, showing options to 'Change Status', 'Change Type', 'Export to CSV', 'Export to Excel', 'Delete', and 'Help'. The table contains columns for Loan, Property Address, Borrower, Type, Servicer, Agency, Investor, Position, and Next Payment. The data rows show various loan statuses such as 'CLOSED', 'DELINQUENT', and 'PMI DELINQUENT'.

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor	Position	Next Payment	
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UPB Amount	Last Payment
000005428	3951 53 SW 51 ST FT LAUDERDALE, FL 33312	Black, Jeff HENRYRKER, JAMES	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 0001149662	Freddie Mac 000005428		1 \$18,853.61		
000169064 0	2005 BOSTON AVENUE RICHMOND, VA 23224	Darby, Esther C. Last, First	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 0001010060727	Freddie Mac 000169064		\$37,950.51	5/1/2014	
000169099 0	123 Peony Street Charleston, SC 29407	Peony, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 46799	Freddie Mac 000169099		\$450,000.00		
000232092 0	191 ELEMENTARY DRIVE MARTINSBURG, WV 25404	Pangle, Virginia 123, test	-- --	SPECIALIZED LOAN SERVICING LLC 1010060714	Freddie Mac 000232092		\$100,700.25	4/1/2014	
000236039 0	123 Cliff Street Jacksonville, FL 32201	Cliff, Jewel L, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 464651	Freddie Mac 000236039		\$350,000.00		
000236233 0	123 Orchid Street Tampa, FL 33601	Flower, James	-- DELINQUENT	SPECIALIZED LOAN SERVICING LLC 56478	Freddie Mac 000236233		\$198,000.00		
000237000 0	278 Peach Tree Cir Atlanta, GA 30301	Moss, Kate Last, First	Conventional-No PMI --	SPECIALIZED LOAN SERVICING LLC 000237000	Freddie Mac 000237000		\$198,000.00		
000237094 0	308 HIGHLAND TR. LADY LAKE, FL 32159	ALEXANDER, FREDERICA,A ALEXANDER, FREDERICA A	PMI DELINQUENT	SPECIALIZED LOAN SERVICING LLC 0201051661	Freddie Mac 000237094		1	4/1/2018	
000238295 0	7016 Hollyberry Rd Roanoke, VA 24018	Johnson, Jimmy	-- CLOSED	SPECIALIZED LOAN SERVICING LLC 000238295	Freddie Mac 000238295		\$189,000.00		
000239283 0	454 HANOVER ROAD SCOTLAND, CT 06264	TEster, TEst	-- --	SPECIALIZED LOAN SERVICING LLC 1010060688	Freddie Mac 000239283		\$189,000.00	12/1/2013	

3. Upon clicking 'Export to CSV' or 'Export to Excel', the result will be an Excel file that can be found in your Downloads folder by default (unless you have manually changed the destination of your Downloads).

## 8 REPORTS

### 8.1 GENERATING A REPORT

1. Select Reports from the Home dropdown menu.

Freddie Mac ADR (UAT) Attorney Data Reporting System

Home / Loans

Loans

Loan	Property Address	Borrower	Type	Servicer	Agency	Investor ID	UP	Labels	All
Priority	City	State	Zip	Status	Servicer ID	Agency ID	Investor ID	UP	
000000000	123 Maple Anywhere, CA 92101		--	Test Servicer	Freddie Mac		\$12,345.67		
000000011	7118 SR 235 KILLBUCK, OH 44637	Todd Shepard	--	U.S. BANCORP MORTGAGE COMPANY	Freddie Mac 000000011		\$0.00		

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 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.
- Optional Report Filters (*Not all reports will have filters available*)

6. If you want to limit your report, uncheck the “All” box to expand your options and select the appropriate boxes, or enter/select items in one or more of the filter options shown above.

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

8. You are redirected back to the Report Request page.

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

---

## 8.2 VIEWING A REPORT

### 8.2.1 REPORT REQUEST PAGE

1. Click on the hyperlink for the report’s name.

2. A new tab opens and all reports delivered for the selected Report Request will be listed in the Documents panel. (*Scheduled reports will have an item for each time the report ran on its schedule, one-time reports will only have one item.*)

3. The report will open download to your computer’s file system.

---

### 8.2.2 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.



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.
- 

## 8.3 REPORT DEFINITIONS

### 8.3.1 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
Servicer	The Servicer assigned to the Loan
ServicerLoan	Servicer Loan Number
SubServicerName	The Sub-servicer assigned to the Loan
State	State location of the property
AttorneyFirm	Attorney Firm assigned to the Case
AttorneyCaseID	The Firm's internal "Case Number"

LastTaskCompleted	The last Task, or "Milestone" that was completed on the case
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

## 9 STATE WORKFLOW

Process – State	Workflow Step
Foreclosure – AK (Non Judicial)	File Received
	Notice of Default Recorded
	Publication/Posting of Sale completed
	Sale Scheduled
	Sale Held
	Deed Recorded
Foreclosure – AK (Judicial)	File Received
	Complaint Filed

	Service of Process Completed
	Judgment
	Sale Scheduled
	Sale Held
	Certificate of Sale Recorded
<b>Foreclosure – AL (Non Judicial)</b>	File Received
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – AL (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Filed
	Sale Scheduled
	Sale Held

**Foreclosure – AR  
(Non Judicial)**

File Received

Notice of Default Filed

Sale Scheduled

Sale Held

Deed Recorded

**Foreclosure – AR  
(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Court Decree/Judgment

Sale Scheduled

Sale Held

**Foreclosure – AZ  
(Non Judicial)**

File Received

Record Notice of Trustee's Sale

Trustee Sale Scheduled

	Sale Held
<b>Foreclosure - AZ (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Sale Scheduled
	Sale Held
	Certificate of Sheriff's Sale
	Deed Issued
<b>Foreclosure - CA (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Redemption Period Expires
	Deed Recorded

<b>Foreclosure – CA (Non-Judicial)</b>	File Received
	Record Notice of Default
	Posting and Publishing of Sale/NOS Mailings
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – CO (Non-Judicial)</b>	File Received
	Sale Scheduled/NED Recorded
	Notice of Election and Demand Sent to Public Trste
	Court Order Obtained Authorizing Sale
	Scheduled Sale Date
	Sale Held
<b>Foreclosure – CT (Judicial)</b>	File Received

	Service of Process Completed
	Complaint Filed
	Motion for Judgment of Foreclosure Filed
	Foreclosure by Sale Decree Entered
	Sale Held
	Deed Recorded
<b>Foreclosure – DC (Non-Judicial)</b>	File Received
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – DC (Judicial)</b>	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
	Sale Held
<b>Foreclosure – DE (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Motion for Judgment of Foreclosure Filed
	Sale Scheduled
	Sale Held
	Confirmation of Sale
	Deed Recorded
<b>Foreclosure – FL (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment Filed

	Judgment Entered
	Sale Scheduled Date (tied to Judgment)
	Sale Held
	Certificate of Title Issued
<b>Foreclosure – GA (Non-Judicial)</b>	File Received
	Sale Scheduled
	First Publication
	Mail Notice of Sale to Borrower
	Sale Held
	Deed Recorded
<b>Foreclosure – HI (Non Judicial)</b>	File Received
	Sale Scheduled
	Publication and Posting of Sale <b>Completed</b>
	Sale Held

<b>Foreclosure - HI (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment and Decree of Foreclosure Filed
	Confirmation of Sale
	Deed Recorded
<b>Foreclosure - IA (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Redemption Period Expires/Deed Recorded

<b>Foreclosure - ID (Non-Judicial)</b>	File Received
	File Notice of Default
	Sale Scheduled
	Publication/Posting on Property Completed
	Sale Held
	Deed Recorded
<b>Foreclosure - IL (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	File Motion for Judgment of Foreclosure
	Judgment Entered
	Sale Scheduled
	Sale Held
	Deed Recorded

**Foreclosure – IN**  
**(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Judgment Entered

Sale Scheduled

Sale Held

Deed Recorded

**Foreclosure – KS**  
**(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Judgment Entered

Sale Scheduled

Sale Held

**Foreclosure – KY**  
**(Judicial)**

File Received

	Complaint Filed
	Service of Process Completed
	Judgment and Order of Sale Entered
	Sale Scheduled
	Sale Held
	Confirmation of Sale
	Deed Recorded
<b>Foreclosure – LA (Judicial by Executory Process)</b>	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
<b>Foreclosure – LA (Judicial by Ordinary Process)</b>	File Received
	Complaint Filed
	Service of Process Completed

	Motion for Default/Summary Judgment Filed (Writ of Fieri Facias)
	Sheriff Seized Property
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – MA (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Order of Notice Received from Land Court
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – MD (Judicial)</b>	File Received
	Complaint (Order to Docket) Filed
	Service of Process Completed
	Sale Scheduled

	Sale Held
	Motion for Final Ratification of Sale Filed
<b>Foreclosure - ME (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Period of Redemption Expires
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure - MI (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Publication of the Notice of Foreclosure
	Sale Scheduled
	Sale Held

	Confirmation of Sale
<b>Foreclosure – MI (Non-Judicial)</b>	File Received
	Sale Scheduled
	Publication Complete
	Sale Held
	Deed Recorded
<b>Foreclosure-MI (Non-Judicial: Pre 7/16/2013)</b>	File Received
<b>*NOTE: This applies to all files activated before</b>	First and Second Notice Prepared
<b>7/16/2013*</b>	Notice Mailed and Pub Sent to Legal Newspaper
	Publication Starts
	Publication Completed
	MCL 600 3208 is Mailed to the Borrower
	MCL 600 3208 Foreclosure Notice Posted
	Sale Scheduled
	Sale Held
	Deed Recorded

**Foreclosure – MN  
(Non Judicial)**

File Received

Notice of Pendency Filed

Sale Scheduled

Sale Held

**Foreclosure – MN  
(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Sale Scheduled

Sale Held

**Foreclosure – MO  
(Non-Judicial)**

File Received

Sale Scheduled

Sale Held

Deed Recorded

**Foreclosure – MS**

**(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Judgment Entered

Sale Scheduled

Sale Held

**Foreclosure – MS**

**(Non-Judicial)**

File Received

Notice of Default Sent to Borrower

Substitution of Trustee Executed and Recorded

Sale Scheduled

Sale Held

Deed Recorded

**Foreclosure – MT**

**(Non Judicial)**

File Received

Sale Scheduled

	Notice of Trustee's Sale Served by Certified Mail
	Affidavits of Notice of Sale Compliance Filed
	Sale Held
	Deed Recorded
<b>Foreclosure – MT (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
<b>Foreclosure – NC (Non-Judicial)</b>	File Received
	Notice of Hearing Filed
	Notice of Hearing Service Completed
	Foreclosure Hearing Held
	Sale Scheduled
	Sale Held

	Deed Recorded
<b>Foreclosure - ND (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure - NE (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Sale Scheduled
	Sale Held
	Confirmation of Sale
	Deed Recorded

**Foreclosure – NE**  
**(Non Judicial)**

File Received

Notice of Default Recorded

Sale Scheduled

Foreclosure Sale Held

Deed Recorded

**Foreclosure – NH**  
**(Non-Judicial)**

File Received

Sale Scheduled

Sale Held

Deed Recorded

**Foreclosure – NJ**  
**(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Default Filed

Judgment Entered / Writ of Execution

	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
<b>Foreclosure - NM (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure - NV (Non Judicial)</b>	File Received
	Record Notice of Default
	Sale Scheduled
	Sale Held
	Deed Recorded

<b>Foreclosure – NV (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Notice of Sheriff's Sale and Posting of Sale
	Sale Held
	Deed Recorded
<b>Foreclosure – NY (Co-op Foreclosure)</b>	File Received
	Title Report Received
	Preliminary Title Clear
	NOD Letter Mailed
	First Publication
	Sale Scheduled
	Final Title Clear
	Sale Held

**Foreclosure – NY**

**(Judicial)**

File Received

Complaint Filed

Service Complete

Affidavit of Service, Request for Judicial Intervention, and Attorney Affirmation Filed

Mandatory Settlement Conference Completed

Motion to Appoint Referee to Compute Filed

Judgment of Foreclosure and Sale Entered

Sale Scheduled

Sale Held

**Foreclosure – OH**

**(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Motion for Judgment Filed

Judgment Entered

Sale Scheduled

Sale Held

	Order of Confirmation Issued
	Deed Recorded
<b>Foreclosure - OK (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Sale Confirmed
	Deed Recorded
<b>Foreclosure - OR (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held

	Deed Recorded
<b>Foreclosure - OR (Non-Judicial)</b>	File Received
	Sale Scheduled and Notice of Default Sent
	Publication and Posting of Sale Completed
	Sale Held
	Deed Recorded
<b>Foreclosure - PA (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Deed Recorded

<b>Foreclosure – RI (Non-Judicial)</b>	File Received
	Expiration of 30 Day Statutory Notice Period
	Publish Notice of Foreclosure Sale
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – SC (Judicial)</b>	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 – SD**

**(Judicial)**

File Received

Complaint Filed

Service of Process Completed

Judgment Entered

Sale Scheduled

Sale Held

Redemption Period Expires

Deed Recorded

**Foreclosure – TN**

**(Non-Judicial)**

File Received

Sale Scheduled

Substitution of Trustee Recorded

Sale Held

Deed Recorded

**Foreclosure – TX**

**(Non-Judicial)**

File Received

	Post Notice of Sale
	File Foreclosure Notice with County Clerk
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – TX (Home Equity Foreclosure)</b>	File Received
	Application for Expedited Order to Allow Foreclosure Filed
	Foreclosure Order and Affidavit
	Signed Order Received
	Posting to Sale Held
	Foreclosure Sale Held
<b>Foreclosure – UT (Non-Judicial)</b>	File Received
	Expiration of 3 Month Reinstatement Period
	Sale Scheduled
	Sale Held
	Deed Recorded

<b>Foreclosure – VA (Non-Judicial)</b>	File Received
	Sale Scheduled
	Publication and Posting of Sale Completed
	Sale Held
	Deed Recorded
<b>Foreclosure – VT (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Motion for Summary Judgment Filed
	Judgment Entered
	Sale Scheduled
	Sale Held
	Sale Confirmed
	Deed Recorded
<b>Foreclosure – WA</b>	File Received

<b>(Non-Judicial)</b>	
	Notice of Sale Recorded
	Sale Scheduled
	Sale Held
	Deed Recorded
<b>Foreclosure – WA (Judicial)</b>	File Received
	Complaint Filed
	Service of Process Completed
	Judgment Entered
	Sale Scheduled
	Foreclosure Sale Held
	Deed Recorded
	Redemption Period Expires
<b>Foreclosure – WI (Judicial)</b>	File Received
	Complaint Filed

	Service of Process Completed
	Judgment Entered
	Redemption Period Expires
	Sale Scheduled
	Sale Held
	Confirmation of Sale
	Deed Recorded
<b>Foreclosure – WV (Non-Judicial)</b>	File Received
	Schedule Trustee Sale
	Notice of Sale Mailed
	Sale Held
	Deed Recorded
<b>Foreclosure – WY (Non-Judicial)</b>	File Received
	Sale Scheduled
	Sale Held
	Certificate of Sale Recorded

	Redemption Period Expires
<b>Foreclosure – PR (Judicial)</b>	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
<b>Foreclosure – VI (Judicial)</b>	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
<b>Bankruptcy - Motion For Relief</b>	File Received
	Relief from Stay/Discharge
<b>Bankruptcy - Proof Of Claim</b>	File Received
	POC Filed
	Plan Confirmed