

CHAPTER 10: ADMIN FUNCTIONS

10.ADMIN FUNCTIONS

This chapter discusses the administrative functions available in the Servicing Module:

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10.1 Admin Functions Overview

The Admin tab allows authorized users to manage certain functions in the system. These functions will be explained in detail in this section. This tab will be limited to a small number of HUD users.

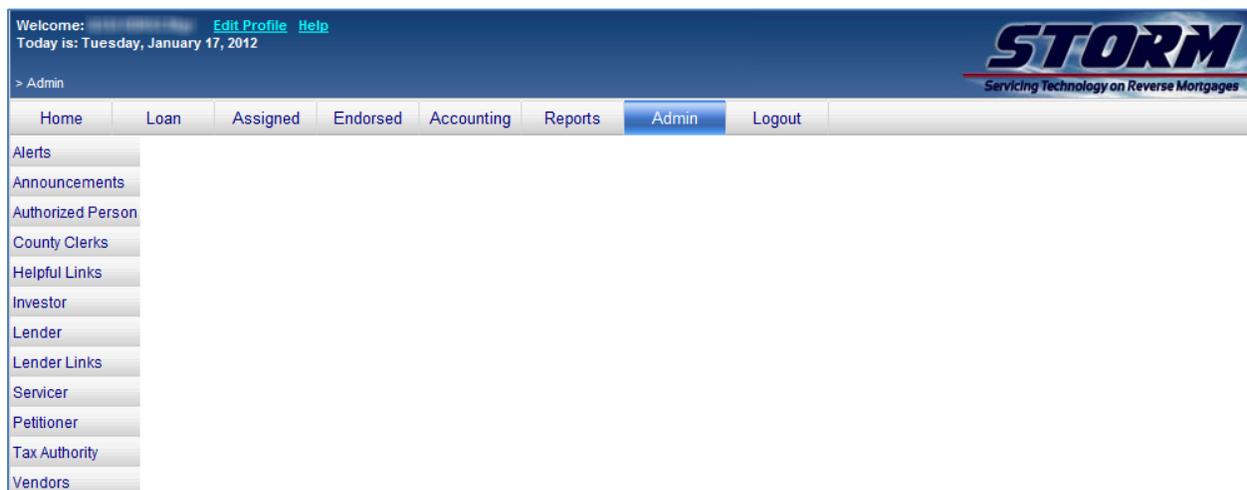


Figure 10-1: Admin Tab

The **Admin** tab enables authorized users to manage the functions listed below:

| Function | Description |
|---------------------------------|---|
| Alerts | Add new manual alerts, edit or inactivate an existing alert. These alerts are displayed on the alerts screen. |
| Announcements | Add new announcements, edit or inactivate an existing announcement related to HUD and its reverse mortgage program. The announcements are displayed on the Servicing Module home page under the Announcements section. |
| Helpful links | Add new links, edit or inactivate an existing link related to HUD and its reverse mortgage program. The links are displayed on the Servicing Module home page under Helpful Links section, displayed on the HERMIT home page. |
| Update Business partners | Add, edit or inactivate HUD Business Partner related to HECM loan processing: <ul style="list-style-type: none"> • Investors • Lenders • Servicers • Petitioners • Tax Authority • Vendors • County Clerks |

Table 10-1: Admin Functions

10.2 Common Functionality

Most maintenance tasks are performed in general the same way as described below.

Step 1. After logging into the system, click the **Admin** tab.

Step 2. From the navigation bar on the left, select a task and a table will be displayed with the type of admin task you selected.

You now can now:

- Restrict your search by applying various filters. (The criteria vary and are discussed below).
- Export the search results to Excel (except Lender Links)
- Sort the search results by a column
- Create a new record (except Lender Links)

10.2.1 Restricting a Search (General Instructions)

Various search filters are associated with each type of task.

To restrict (filter) your search results:

Step 1. Complete one of more of the fields at the top of the screen.

Step 2. Click **Filter**.

10.2.2 Sorting the Search Results by Column (General Instructions)

You can sort the table for any task by clicking on the column header.

10.2.3 Exporting your Search Results to Excel (General Instructions)

You can export the table of results in .xls format. Exporting to a spreadsheet application enables you to work with the data or import it into some external database applications.

To export the table to Excel:

Step 1. Filter or sort the table if desired.

Step 2. Click the Export to Excel link.

Step 3. Follow the prompts to save or open the file.

10.2.4 Create a New Record (General Instructions)

To create a record:

Step 1. Click the **New** button.

Step 2. Fill in (at a minimum) the required fields and click **OK**. The tab information table is displayed and the record will be added to the table.

Specific instructions for creating a record for each type of admin task are discussed later in this chapter.

10.2.5 Editing an Existing Record

To edit a record:

Step 1. Click a record from the table.

Step 2. Edit the desired fields and then click **OK**. The tab information table will display and the edited record will be displayed in the table.

Specific instructions for editing a record each type of admin task are discussed later in this chapter.

10.3 Alerts Screen

This screen enables authorized users to add new alerts manually, or to edit or inactivate an existing alert. Upon the addition of new alert, authorized users can select the new alert from the alerts drop down list and add it on a loan. You cannot delete an alert. An alert that should no longer be used should be changed to inactive.

Alerts Screen Screenshot Details:

- Header: Welcome: [User], Edit Profile, Help. Today is: Tuesday, January 17, 2012. STORM Servicing Technology on Reverse Mortgages.
- Navigation: Home, Loan, Assigned, Endorsed, Accounting, Reports, Admin, Logout.
- Alert Type Filter: Alert Type Desc: [], Alert Severity: --ALL--, Status: --ALL--.
- Buttons: FILTER, CLEAR, NEW.
- Alert Type Results: Export to Excel, Text Color = Inactive Record.
- Table Columns: Alert Type Skey, Alert Type Name, Alert Severity, Status, Created By, Create Date.

| Alert Type Skey | Alert Type Name | Alert Severity | Status | Created By | Create Date |
|-----------------|--|------------------|--------|------------|------------------------|
| | Loan Balance > 95% of Max Claim Amount | Critical | A | | 04/30/2011 12:00:00 AM |
| | Power Of Attorney (POA) Received | General Tracking | A | | 04/30/2011 12:00:00 AM |
| | Insurance Default | Critical | A | | 04/30/2011 12:00:00 AM |
| | Tax Default | Critical | A | | 04/30/2011 12:00:00 AM |
| | Death Certificate Received - Borrower | General Tracking | A | | 04/30/2011 12:00:00 AM |
| | Death Certificate Received - Co-Borrower | General Tracking | A | | 04/30/2011 12:00:00 AM |
| | Loan Setup Issue | Critical | A | | 04/30/2011 12:00:00 AM |
| | HECM Complaint | Critical | A | | 04/30/2011 12:00:00 AM |
| | Occupancy Issue/Intent to Return | General Tracking | A | | 04/30/2011 12:00:00 AM |
| | Occupancy Issue/Intent to Unknown | General Tracking | A | | 04/30/2011 12:00:00 AM |
| | Death of Borrower | Critical | S | | 04/30/2011 12:00:00 AM |
| | Death of Co-Borrower | Critical | S | | 04/30/2011 12:00:00 AM |

Figure 10-2: Alerts Screen

10.3.1 Filtering Alerts

Alerts can be filtered by:

- Alert type
- Description
- Severity
- Status

10.3.2 Sorting Alerts

Alerts can be sorted by:

- Alert Type Skey
- Alert Type Name
- Alert Severity
- Status
- Created By
- Create Date
- Maintained by
- Maintenance date

10.3.3 Creating an Alert

To create a new alert:

Step 1. Click the **Alerts** tab and click **New**. The **Alert** screen is displayed so the user can create a new alert.

Figure 10-3: Creating an Alert

Step 2. On the dialog box, for Alert Type Information, specify:

- The status of the alert (Active, Inactive, or System Generated)
- The name of the alert
- The severity (General Tracking or Critical)

Step 3. Click **OK**.

10.3.4 Editing an Alert

You can edit all fields for alerts except Alert Type Skey and audit information.

Step 1. Click on a record in the table and the **Edit Alerts** screen will be displayed.

Figure 10-4: Editing an Alert

Step 2. Modify the information you need to edit and click the **OK** button. The **Alerts** tab record table with the edited record will be displayed in the table.

10.4 Announcements Screen

This screen enables authorized users to add new announcements, or to edit or inactivate an existing announcement related to HUD and its reverse mortgage program. The announcements with an active status and an expiration date greater than the current system date are displayed on the Home page under the Announcements section. You cannot delete an announcement. An announcement that should no longer be used should be changed to Inactive.

STORM
Servicing Technology on Reverse Mortgages

Home Loan Assigned Endorsed Accounting Reports Admin Logout

Alerts
Announcements
Authorized Person
County Clerks
Helpful Links
Investor
Lender
Lender Links
Servicer
Petitioner
Tax Authority
Vendors

Announcements Filter

Description: Posted Date: <=

Status: --ALL-- Expiration Date: <=

Announcements Results

[Export to Excel](#) Text Color = Inactive Record

| Key | Description | Posted Date | Expiration Date | Status | Created By | Create Date |
|--|--|------------------------|-----------------|--------|------------|------------------------|
| HECM SP | HECM SP | 03/25/2011 08:56:48 PM | 06/30/2011 | A | | 04/30/2011 12:00:00 AM |
| Get in on the reverse mortgage boom! | Get in on the reverse mortgage boom! | 07/22/2010 12:00:00 AM | 10/20/2011 | A | | 04/30/2011 12:00:00 AM |
| HECM SP Parallel | HECM SP Parallel | 03/25/2011 08:54:32 PM | 10/04/2011 | I | | 04/30/2011 12:00:00 AM |
| HECM SP GO Live is just around the corner. | HECM SP GO Live is just around the corner. | 03/25/2011 08:55:21 PM | 10/01/2011 | I | | 04/30/2011 12:00:00 AM |
| HECM SP Test announcement | HECM SP Test announcement | 05/01/2011 11:04:56 AM | 05/02/2011 | A | | 04/30/2011 12:00:00 AM |

Figure 10-5: Announcements Screen

10.4.1 Filtering Announcements

Announcements can be filtered by:

- Description
- Posted Date
- Status
- Expiration Date

10.4.2 Sorting Announcements

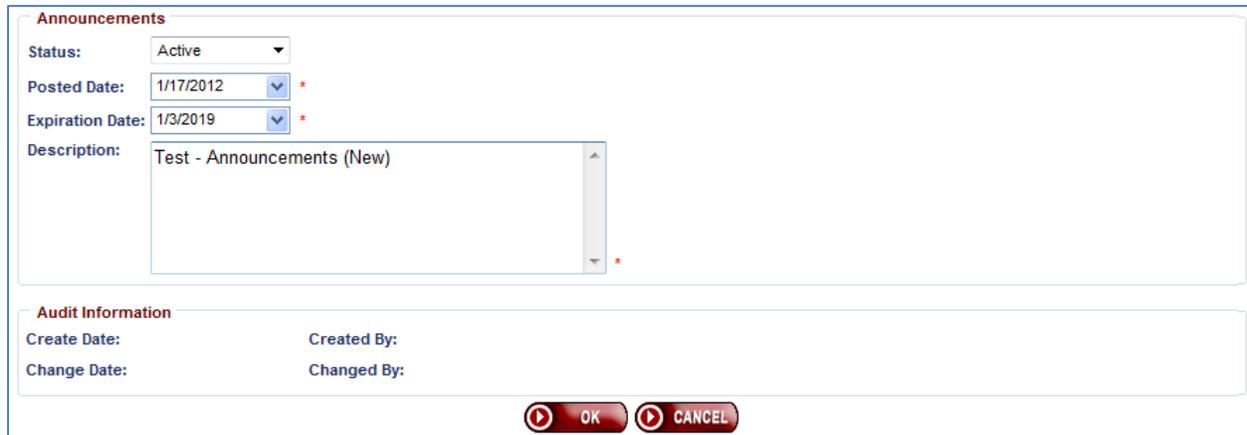
Announcements can be sorted by:

- Skey
- Description
- Posted Date
- Expiration Date
- Status
- Created By
- Create Date

10.4.3 Creating an Announcement

To create an announcement:

Step 1. Click **New**. The **Announcements** screen will display so the user can create an announcement.



The screenshot shows a web form titled "Announcements". It contains the following fields and sections:

- Status:** A dropdown menu with "Active" selected.
- Posted Date:** A date picker showing "1/17/2012".
- Expiration Date:** A date picker showing "1/3/2019".
- Description:** A text area containing "Test - Announcements (New)".
- Audit Information:** A section with labels for "Create Date:", "Created By:", "Change Date:", and "Changed By:", but no input fields are visible.
- Buttons:** Two red buttons labeled "OK" and "CANCEL" at the bottom center.

Figure 10-6: Creating an Announcement

Step 2. Enter:

- Status (Select either Active or Inactive)
- Posted Date (The day the announcement should appear on the site)
- Expiration Date (The date the announcement should be removed from the site)
- Description (The text of the announcement)

Step 3. Click **OK**.

10.4.4 Editing an Announcement

You can edit all fields for announcements except audit information.

Step 1. Click on a record in the table and the **Announcements** screen will be displayed.

Announcements

Status: Active

Posted Date: 1/17/2012 *

Expiration Date: 1/3/2019 *

Description: Test - Announcements (Edit)

Audit Information

Create Date: 01/17/2012 11:00:32 AM Created By: [redacted]

Change Date: 01/17/2012 11:01:06 AM Changed By: [redacted]

OK CANCEL

Figure 10-7: Editing an Announcement

Step 2. Modify the information you need to edit and click the **OK** button. The **Announcements** tab record table with the edited record will be displayed in the table.

10.5 County Clerks Screen

This screen enables authorized users to add county clerks, or to edit or inactivate a county clerk.

These are the clerks of court for the county in which the mortgaged property is located. You cannot delete a county clerk. A county clerk that should no longer be used should be changed to Inactive.

Welcome: [redacted] [Edit Profile](#) [Help](#)

Today is: Tuesday, January 17, 2012

> Admin > County Clerk Search

Home Loan Assigned Endorsed Accounting Reports Admin Logout

Alerts

Announcements

Authorized Person

County Clerks

Helpful Links

Investor

Lender

Lender Links

Servicer

Petitioner

Tax Authority

Vendors

County Clerk Filter

County Clerk Name: County State: --ALL-- Status: --ALL-- **FILTER** **CLEAR** **NEW**

County Clerk Results

[Export to Excel](#) Text Color = Inactive Record

| County Clerk Skey | County Clerk Name | Poa Recorded Date | Poa Book |
|-------------------|-------------------|------------------------|----------|
| [redacted] | [redacted] | | |
| [redacted] | [redacted] | 05/20/2005 12:00:00 AM | |
| [redacted] | [redacted] | 11/28/2005 12:00:00 AM | |
| [redacted] | [redacted] | 09/13/2004 12:00:00 AM | |
| [redacted] | [redacted] | | |

Figure 10-8: County Clerks Screen

10.5.1 Filtering County Clerks

County clerks can be filtered by:

- County Clerk Name
- State
- Status

10.5.2 Sorting County Clerks

County clerks can be sorted by:

- County Clerk Skey
- County Clerk Name
- POA Recorded Date
- POA Book No
- POA Page No
- POA Instrument No
- Pay To Name
- Attention To
- County Address1
- County Address2
- County State
- County Zip
- POA Sent For Recording Date
- Recording Fee Info
- Status
- Created By
- Create Date
- Maint By
- Maint Date
- First Page Rec Fee Amt
- Additional Page Rec Fee Amt
- Customer ID

10.5.3 Creating a County Clerk

To create a county clerk record:

Step 1. Click **New**. The **County Clerks** screen will display so the user can add a new county clerk.

Figure 10-9: Creating a County Clerk

Step 2. Enter the following information

- Status
- County Clerk Name (required)
- POA Recorded Date
- POA Book No
- POA Page No
- POA Instrument No
- Pay To Name
- Attention To
- POA Sent For Recording Date
- Recording Fee Info
- First Page Rec Fee Amt
- Additional Page Rec Fee Amt
- Address1 (required)
- Address2

Step 3. Click **OK**.

10.5.4 Editing a County Clerk

You can edit all fields except county clerk skey, customer ID, and audit information.

Step 1. Click on a record in the table and the **County Clerk** screen will be displayed.

The screenshot displays a web form for editing a County Clerk record. The form is organized into four main sections:

- County Clerk Information:** Includes a Status dropdown menu set to 'Active', a Customer ID field, a County Clerk Skey field, and a County Clerk Name field.
- POA Information:** Includes Poa Recorded Date (1/3/2012), Poa Book No (123), Poa Page No (123), Poa Instrument No (123), Pay To Name, Attention To, Poa Sent For Recording Date (1/4/2012), Recording Fee Info (Test), First Page Rec Fee Amt (\$100.00), and Additional Page Rec Fee Amt (\$10.00).
- Address Information:** Includes Address1, Address2, City (Denver), State (CO), and Zip (12345-6789).
- Audit Information:** Shows Create Date (01/17/2012 11:28:18 AM), Created By (gsshdnscmr), Change Date (01/17/2012 11:28:43 AM), and Changed By (gsshdnscmr).

At the bottom of the form are two buttons: 'OK' and 'CANCEL'.

Figure 10-10: Editing a County Clerk

Step 2. Modify the information you need to edit and click the **OK** button. The **County Clerk** tab record table with the edited record will be displayed in the table.

10.6 Helpful Links Screen

This screen enables authorized users to add new links, or to edit or inactivate an existing link related to HUD and its reverse mortgage program. The links with active status and expiration date greater than the current system date are displayed on the Home page under the Helpful Links section. You cannot delete a link. A link that should no longer be used should be changed to Inactive.

| Key | Description | Link URL | Link Text | Posted Date | Expiration Date | Status | Created By | 0 |
|-----|-----------------------------|-------------------------------------|-----------------------------|------------------------|-----------------|--------|------------|---|
| | Get Adobe Reader | http://get.adobe.com/reader/ | Adobe Reader | 03/01/2011 12:00:00 AM | 12/12/2030 | A | | 0 |
| | All HECM Mortgagee Letters | http://www.hud.gov/hudwebportal/... | HECM Mortgagee Letters | 05/05/2011 09:49:25 AM | 05/05/2021 | A | | 0 |
| | HUD Debenture Interest Rate | http://www.hud.gov/hudwebportal/... | HUD Debenture Interest Rate | 09/08/2011 04:14:17 PM | 09/01/2020 | A | | 0 |
| | Mortgage Letters | http://www.hud.gov/hudwebportal/... | HUD Clips | 01/03/2011 08:35:18 AM | 01/05/2015 | A | | 0 |
| | Mortgage Letters | http://www.hud.gov/hudwebportal/... | HUD Clips | 01/03/2011 12:00:00 AM | 01/05/2015 | A | | 0 |
| | HECM Servicing FAQ's | http://www.hud.gov/hudwebportal/... | HECM Servicing FAQ's | 04/04/2011 09:36:08 AM | 04/02/2012 | A | | 0 |
| | This is a test link | http://www.hud.gov/hudwebportal/... | Home Page | 05/01/2011 11:08:35 AM | 05/02/2011 | A | | 0 |
| | Yahoo | http://www.yahoo.com | yahoo | 02/22/2011 02:18:49 PM | 02/23/2011 | A | | 0 |
| | Yahoo.com | http://www.yahoo.com | yahoo | 02/22/2011 02:19:12 PM | 02/23/2011 | A | | 0 |

Figure 10-11: Helpful Links Screen

10.6.1 Filtering Helpful Links

You can filter Helpful Links by:

- Link Text
- Posted Date
- Status
- Expiration Date

10.6.2 Sorting Helpful Links

You can sort Helpful Links by:

- Key
- Description
- Link URL
- Link Text
- Posted Date
- Expiration Date
- Status
- Created By
- Create Date
- Changed By
- Change Date

10.6.3 Creating Helpful Links

Step 1. Click **New**. The **Helpful Links** screen is displayed so the user can create a link.

The screenshot shows the 'Helpful Links' form with the following fields and values:

- Status: Active (dropdown)
- Posted Date: 1/17/2012 (calendar icon)
- Expiration Date: 1/29/2016 (calendar icon)
- Link URL: http://www.cnn.com
- Link Text: CNN Weblink
- Description: Test - CNN weblink

Below the form is an 'Audit Information' section with fields for 'Create Date', 'Created By', 'Change Date', and 'Changed By'. At the bottom are 'OK' and 'CANCEL' buttons.

Figure 10-12: Creating a Helpful Link

Step 2. Enter the following information:

- Status
- Posted Date
- Expiration Date
- Link URL (required)
- Link Text (required)
- Description

Step 3. Click **OK**.

10.6.4 Editing a Helpful Link

You can edit all fields except for audit information.

Step 1. Click on a record in the table and the **Helpful Link** screen will be displayed.

The screenshot shows the 'Helpful Links' form in edit mode with the following fields and values:

- Status: Active (dropdown)
- Posted Date: 1/17/2012 (calendar icon)
- Expiration Date: 1/29/2016 (calendar icon)
- Link URL: http://www.cnn.com
- Link Text: CNN Weblink
- Description: Test - CNN weblink (Edit)

The 'Audit Information' section shows the following data:

- Create Date: 01/17/2012 11:43:35 AM
- Created By: [redacted]
- Change Date: 01/17/2012 11:43:46 AM
- Changed By: [redacted]

At the bottom are 'OK' and 'CANCEL' buttons.

Figure 10-13: Editing a Helpful Link

Step 2. Modify the information you need to edit and click the OK button. The Helpful Link tab record table with the edited record will be displayed in the table.

10.7 Investor Screen

This screen allows the authorized user to add a new Investor, edit or inactivate an Investor. You cannot delete an investor. An investor that should no longer be used should be changed to Inactive.

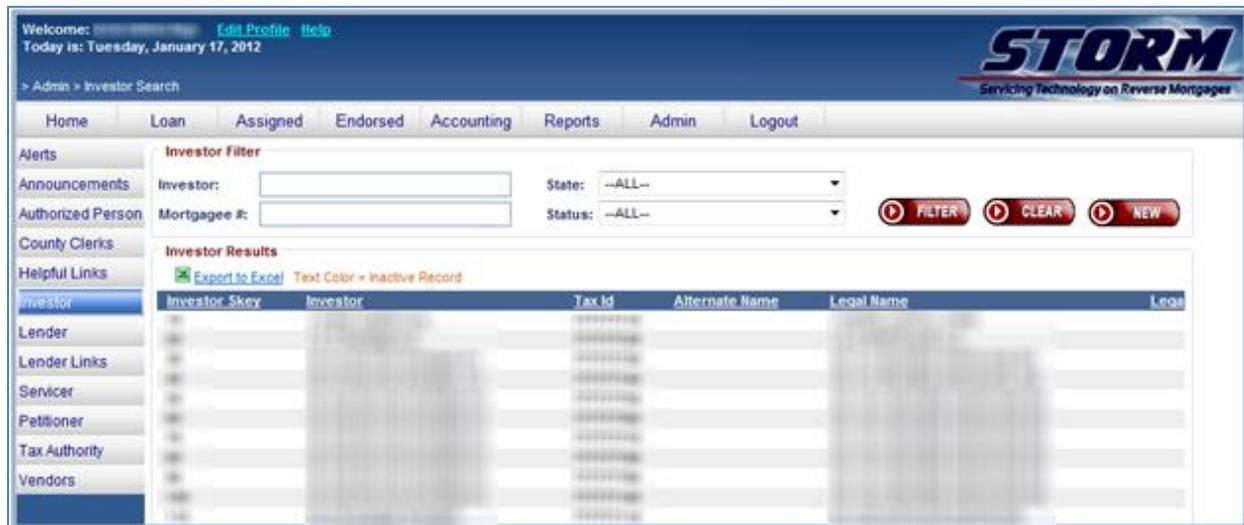


Figure 10-14: Investors Screen

10.7.1 Filtering Investors

You can sort investors by:

- Name (Investor)
- State
- Mortgagee #
- Status

10.7.2 Sorting Investors

You can sort Investors by:

- Investor Skey
- Investor Tax ID
- Alternate Name
- Legal Name
- Legal Name Part 1
- Legal Name Part 2
- Address1
- Address2
- City
- State
- Zip
- Main Phone #
- Alt Phone #
- Fax #

- Email
- Website URL

10.7.3 Creating an Investor

To create an investor:

Step 1. Click **New**. The **Investor** screen is displayed so the user can add a new investor.

The screenshot shows a web-based form for creating an investor. The form is organized into six main sections, each with a red header:

- Investor Information:** Includes a 'Status' dropdown menu set to 'Active', an 'Investor' text field containing 'A User Guide 1', and several empty numeric input fields for 'Mortgagee #', 'Tax Id', 'Business Hours', 'Aba Routing #', 'Account #', and 'Fannie Mae Servicer #'.
- Legal Name Information:** Contains four text input fields for 'Alternate Name', 'Legal Name', 'Legal Name Part1', and 'Legal Name Part2'.
- Address Information:** Features three text input fields for 'Address1', 'Address2', and 'City' (pre-filled with 'Denver'), a 'State' dropdown menu set to 'CO', and a 'Zip' input field pre-filled with '12354-1111'.
- Phone/Fax Information:** Includes input fields for 'Phone #', 'All Phone #', 'Email', and 'Website Url', along with a 'Fax #' input field.
- Check Information:** Contains input fields for 'Check Payable To', 'Correspondence Department', 'Correspondence Contact', and 'Funds Received By Time'.
- Audit Information:** Includes input fields for 'Create Date', 'Change Date', 'Created By', and 'Changed By'.

At the bottom of the form, there are two red buttons: 'OK' and 'CANCEL'.

Figure 10-15: Creating an Investor

Step 2. Enter the following information:

- Status
- Investor (required)
- Mortgagee #
- Tax ID
- Business Hours
- ABA Routing #
- Account #

- Fannie Mae Servicer #
- Alternate Name
- Legal Name
- Legal Name Part1
- Legal Name Part2
- Address1(required)
- Address2
- City
- State
- Phone #
- Fax #
- Alt Phone #
- Email
- Website URL
- Check Payable To (required)
- Correspondence Department
- Correspondence Contact
- Funds Received By Time

Step 3. Click **OK**.

10.7.4 Editing an Investor

You can edit all fields except Investor Skey, Customer ID and audit information.

Step 1. Click on a record in the table and the **Investor** screen will be displayed.

| | |
|-------------------------------|--------------------------|
| Investor Information | |
| Status: | Active |
| Investor Skey: | XXXXXXXXXX |
| Investor: | A User Guide 1 |
| Mortgagee #: | XXXXXXXXXX |
| Business Hours: | |
| Aba Routing #: | XXXXXXXXXX |
| Fannie Mae Servicer #: | XXXXXXXXXX |
| Customer Id: | XXXXXXXXXX |
| Tax Id: | XXXXXXXXXX |
| Account #: | XXXXXXXXXX |
| Legal Name Information | |
| Alternate Name: | XXXXXXXXXX |
| Legal Name: | XXXXXXXXXX |
| Legal Name Part1: | XXXX |
| Legal Name Part2: | XXXX |
| Address Information | |
| Address1: | XXXXXXXXXX |
| Address2: | |
| City: | Denver |
| State: | CO |
| Zip: | 12354-1111 |
| Phone/Fax Information | |
| Phone #: | XXXXXXXXXX |
| Alt Phone #: | XXXXXXXXXX |
| Email: | XXXXXXXXXX |
| Website Url: | |
| Check Information | |
| Max Check Shortage Amount: | \$0.00 |
| Max Check Overage Amount: | \$0.00 |
| Check Payable To: | XXXXXXXXXX |
| Correspondence Department: | XXXXXXXXXX |
| Correspondence Contact: | XXXX |
| Funds Received By Time: | |
| Requires Private Label: | <input type="checkbox"/> |
| Audit Information | |
| Create Date: | 01/29/2012 03:01:22 PM |
| Created By: | XXXXXXXXXX |
| Change Date: | |
| Changed By: | |

Figure 10-16: Editing an Investor

Step 2. Modify the information you need to edit and click the **OK** button. The **Investor** tab record table with the edited record will be displayed in the table.

10.8 Lender Screen

This screen enables authorized users to add a lender, or to edit or inactivate a Lender. You cannot delete a lender. A lender that should no longer be used should be changed to Inactive.

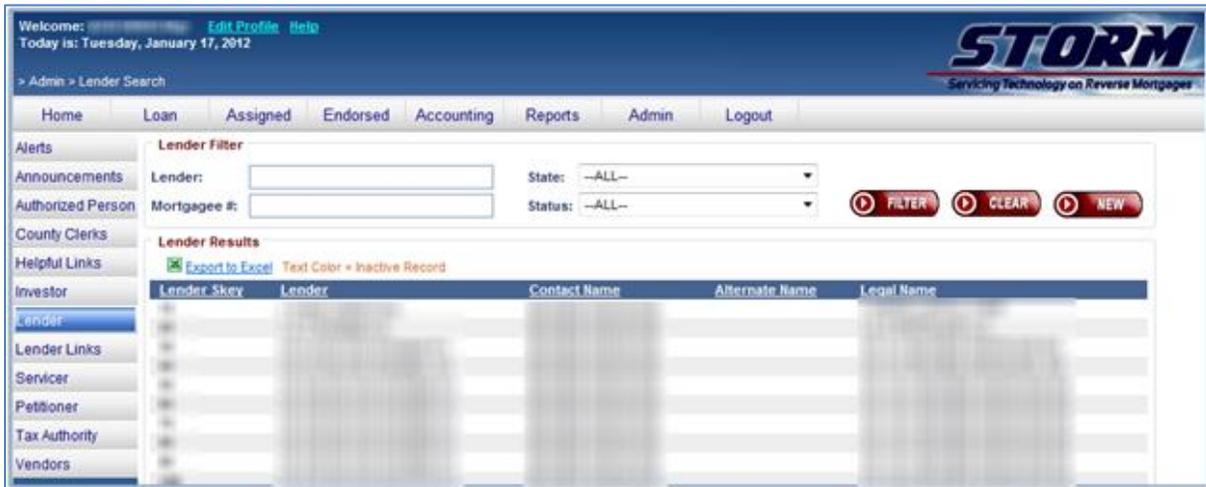


Figure 10-17: Lenders Screen

10.8.1 Filtering Lenders

You can filter lenders by:

- Lender
- State
- Mortgagee #
- Status

10.8.2 Sorting Lenders

You can sort lenders by:

- Lender Skey
- Lender Contact Name
- Alternate Name
- Legal Name
- Legal Name Part 1
- Legal Name Part 2
- Address1
- Address2
- City
- State Zip
- Main Phone #
- Alt Phone #
- Hearing Impaired #

- Fax #
- Email
- Website URL
- Check Payable To
- Correspondence Dept
- Correspondence Contact
- Funds Received By
- Time Status
- ABA Routing #
- Account #
- Mortgagee #
- Business Hours
- Create Date
- Created By
- Change Date
- Changed By

10.8.3 Creating a New Lender

To create a lender:

Step 1. Click **New**. The **Lender** screen is displayed so the user can add a new Lender.

| | |
|---|-------------------------|
| Lender Information | |
| Status: | Active |
| Lender: * | A User Guide for Lender |
| Contact Name: | |
| Mortgagee #: | Tax Id: |
| Business Hours: | |
| Aba Routing #: | Account #: |
| Legal Name Information | |
| Alternate Name: | |
| Legal Name: | |
| Legal Name Part1: | |
| Legal Name Part2: | |
| Address Information | |
| Address1: * | |
| Address2: | |
| City: | Denver |
| State: | CO |
| Zip: | 12345-1111 |
| Phone/Fax Information | |
| Phone #: | Fax #: |
| Alt Phone #: | Hearing Impaired #: |
| Email: | |
| Website Url: | |
| Check Information | |
| Check Payable To: * | |
| Correspondence Department: | |
| Correspondence Contact: | |
| Funds Received By Time: | |
| Audit Information | |
| Create Date: | Created By: |
| Change Date: | Changed By: |
| <input type="button" value="OK"/> <input type="button" value="CANCEL"/> | |

Figure 10-18: Creating a Lender

Step 2. Enter the following information:

- Lender Information
- Status
- Lender (required)
- Contact Name
- Mortgagee #
- Tax ID
- Business Hours
- ABA Routing #
- Account #
- Alternate Name
- Legal Name
- Legal Name Part1
- Legal Name Part2
- Address1 (required)
- Address2
- City
- State
- Phone #
- Fax #
- Alt Phone #
- Hearing Impaired #
- Email
- Website URL
- Check Payable To (required)
- Correspondence Department
- Correspondence Contact
- Funds Received By Time

10.8.4 Editing a Lender

You can edit all fields except Lender Skey and audit information.

Step 1. Click on a record in the table and the **Lender** screen will be displayed.

| | |
|---|-------------------------|
| Lender Information | |
| Status: | Active |
| Lender Skey: | 01100 |
| Lender: | A User Guide for Lender |
| Contact Name: | 00000000000000000000 |
| Mortgagee #: | 0000000000 |
| Business Hours: | |
| Aba Routing #: | 0000000000 |
| Account #: | 0000000000 |
| Legal Name Information | |
| Alternate Name: | |
| Legal Name: | |
| Legal Name Part1: | |
| Legal Name Part2: | |
| Address Information | |
| Address1: | 00000000000000000000 |
| Address2: | |
| City: | Denver |
| State: | CO |
| Zip: | 12345-1111 |
| Phone/Fax Information | |
| Phone #: | 0000000000000000 |
| Fax #: | 0000000000000000 |
| Alt Phone #: | |
| Hearing Impaired #: | |
| Email: | |
| Website Url: | |
| Check Information | |
| Check Payable To: | 0000000000 |
| Correspondence Department: | |
| Correspondence Contact: | |
| Funds Received By Time: | |
| Audit Information | |
| Create Date: | 01/29/2012 03:43:11 PM |
| Created By: | 0000000000 |
| Change Date: | |
| Changed By: | |
| <input type="button" value="OK"/> <input type="button" value="CANCEL"/> | |

Figure 10-19: Editing a Lender

Step 2. Modify the information you need to edit and click the **OK** button. The **Lender** tab record table with the edited record will be displayed in the table.

10.9 Servicers Screen

This screen enables authorized users to add lenders, or edit or inactivate a lender. This screen also allows authorized user to set “No Pay” on the Servicer. Refer to Claims “No Pay” section for details. You cannot delete a servicer. A servicer that should no longer be used should be changed to Inactive.

Figure 10-20: Servicer Screen

10.9.1 Filtering Servicers

Servicers can be filtered on one or more of following criteria:

- Name
- Mortgagee Number
- State
- Status

10.9.2 Sorting Servicers

Servicers can be sorted by:

- Servicer Skey
- Servicer Contact Name
- Tax ID
- Alternate Name
- Legal Name
- Legal Name Part 1
- Legal Name Part 2
- Address1
- Legal Name Part 2
- Address1
- Address2
- City
- State

- Zip
- Main Phone #
- Alt Phone #
- Hearing Impaired #
- Fax #
- Email
- Website URL
- Check Payable To
- Correspondence Dept
- Correspondence Contact
- Funds Received By Time
- Status
- ABA Routing #
- Account #
- Mortgagee #
- Business Hours
- Customer ID
- Create Date
- Created By
- Change Date
- Changed By

10.9.3 Creating a Servicer

To create a servicer:

Step 1. Click **New**. The **Servicer** screen is displayed so the user can add a new Servicer.

The screenshot shows a web form for creating a servicer, organized into several sections:

- No Pay Information:** A checkbox labeled "No Pay:".
- Loan Servicer Information:** Includes a "Status:" dropdown menu (set to "Active"), a "Servicer:" text field (containing "A User Guide Servicer"), "Contact Name:", "Mortgagee #:", "Business Hours:", "Aba Routing #:", "Tax Id:", and "Account #:" fields.
- Legal Name Information:** Includes "Alternate Name:", "Legal Name:", "Legal Name Part1:", and "Legal Name Part2:" text fields.
- Address Information:** Includes "Address1:", "Address2:", "City:" (containing "Denver"), "State:" (dropdown menu set to "CO"), and "Zip:" (containing "12134-5111") fields.
- Phone/Fax Information:** Includes "Phone #:", "Alt Phone #:", "Email:", "Website Url:", "Fax #:", and "Hearing Impaired #:" fields.
- Check Information:** Includes "Check Payable To:", "Correspondence Department:", "Correspondence Contact:", and "Funds Received By Time:" fields.
- Audit Information:** Includes "Create Date:", "Change Date:", "Created By:", and "Changed By:" fields.

At the bottom of the form are two buttons: "OK" and "CANCEL".

Figure 10-21: Creating a Servicer

Step 2. Enter the following information

- No Pay
- Status
- Servicer (required)
- Contact Name
- Mortgagee #
- Tax ID
- Business Hours

- ABA Routing #
- Account #
- Alternate Name
- Legal Name
- Legal Name Part1
- Legal Name Part2
- Address1 (required)
- Address2
- City
- State
- Phone #
- Fax #
- Alt Phone #
- Hearing Impaired #
- Email
- Website URL
- Payable To (required)
- Correspondence Department
- Correspondence Contact
- Funds Received By Time

10.9.4 Editing a Servicer

All fields can be edited except customer ID, servicer key, and audit information. Note: Special permission is built to edit No Pay check box. Only authorized users with the edit No Pay permission can edit the checkbox.

Step 1. Click on a record in the table and the **Servicer** screen will be displayed.

| | |
|---|--|
| No Pay Information | |
| No Pay: | <input type="checkbox"/> |
| Loan Servicer Information | |
| Status: | Active <input type="text"/> |
| Customer Id: | <input type="text"/> |
| Servicer Skey: | <input type="text"/> |
| Servicer: * | A User Guide Servicer <input type="text"/> |
| Contact Name: | <input type="text"/> |
| Mortgagee #: | <input type="text"/> |
| Tax Id: | <input type="text"/> |
| Business Hours: | <input type="text"/> |
| Aba Routing #: | <input type="text"/> |
| Account #: | <input type="text"/> |
| Legal Name Information | |
| Alternate Name: | <input type="text"/> |
| Legal Name: | <input type="text"/> |
| Legal Name Part1: | <input type="text"/> |
| Legal Name Part2: | <input type="text"/> |
| Address Information | |
| Address1: * | <input type="text"/> |
| Address2: | <input type="text"/> |
| City: | SAINT LOUIS |
| State: | MO <input type="text"/> |
| Zip: | 63103-2218 |
| Phone/Fax Information | |
| Phone #: | <input type="text"/> |
| Fax #: | <input type="text"/> |
| Alt Phone #: | <input type="text"/> |
| Hearing Impaired #: | <input type="text"/> |
| Email: | <input type="text"/> |
| Website Uri: | <input type="text"/> |
| Check Information | |
| Check Payable To: * | <input type="text"/> |
| Correspondence Department: | <input type="text"/> |
| Correspondence Contact: | <input type="text"/> |
| Funds Received By Time: | <input type="text"/> |
| Audit Information | |
| Create Date: | 06/22/2011 04:23:54 PM |
| Created By: | <input type="text"/> |
| Change Date: | <input type="text"/> |
| Changed By: | <input type="text"/> |
| <input type="button" value="OK"/> <input type="button" value="CANCEL"/> | |

Figure 10-22: Editing a Servicer

Step 2. Modify the information you need to edit and click the **OK** button. The **Servicer** tab record table with the edited record will be displayed in the table.

10.10.3 Creating a Petitioner

To create a petitioner:

Step 1. Click **New**. The **Petitioner** screen will display so the user can add a new petitioner.

The screenshot shows a web form titled "Petitioner Information" with the following fields and values:

- Status:** Active (dropdown menu)
- Petitioner:** Test HECM User Guide (text input)
- Address Information:**
 - Address1:** (text input)
 - Address2:** (text input)
 - City:** Denver (text input)
 - State:** CO (dropdown menu)
 - Zip:** 12312-3121 (text input)
- Phone/Fax Information:**
 - Phone #:** (text input)
 - Fax #:** (text input)
- Audit Information:**
 - Create Date:** (text input)
 - Created By:** (text input)
 - Change Date:** (text input)
 - Changed By:** (text input)

At the bottom of the form are two buttons: "OK" and "CANCEL".

Figure 10-24: Creating a Petitioner

Step 2. Enter the following information:

- Status
- Petitioner (required)
- Address1 (required)
- Address2
- City
- State
- Zip
- Phone #
- Fax #

Step 3. Click **OK**.

10.10.4 Editing a Petitioner

All fields except audit information and Petitioner Skey can be edited.

Step 1. Click on a record in the table and the **Petitioner** screen will be displayed.

The screenshot shows the same "Petitioner Information" form as in Figure 10-24, but with the following differences:

- Petitioner Skey:** (text input)
- Petitioner:** Test HECM User Guide - (EDIT) (text input)
- Audit Information:**
 - Create Date:** 01/17/2012 02:26:26 PM
 - Created By:** (text input)
 - Change Date:** 01/17/2012 02:26:37 PM
 - Changed By:** (text input)

At the bottom of the form are two buttons: "OK" and "CANCEL".

Figure 10-25: Editing a Petitioner

Step 2. Modify the information you need to edit and click the **OK** button. The **Petitioner** tab record table with the edited record will be displayed in the table.

- Create Date
- Maint By
- Maint Date

10.11.3 Creating a Tax Authority

Step 1. Click **New**. The **Tax Authority** screen will display so the user can add a new Tax Authority.

Tax Authority Information

Status: Active

Tax Authority Name: * 1 Test Tax Authority Name

Tax Authority Code: *

Tax Authority Type Code: COUNTY TAX

County: Cook County

Auth Payee:

Address Information

Address1: *

Address2:

City: Chicago State: IL Zip: 22548-5212

Phone/Fax Information

Phone #:

Fax #:

Audit Information

Create Date: Created By:

Change Date: Changed By:

OK CANCEL

Figure 10-27: Creating a Tax Authority

Step 2. Enter the following information:

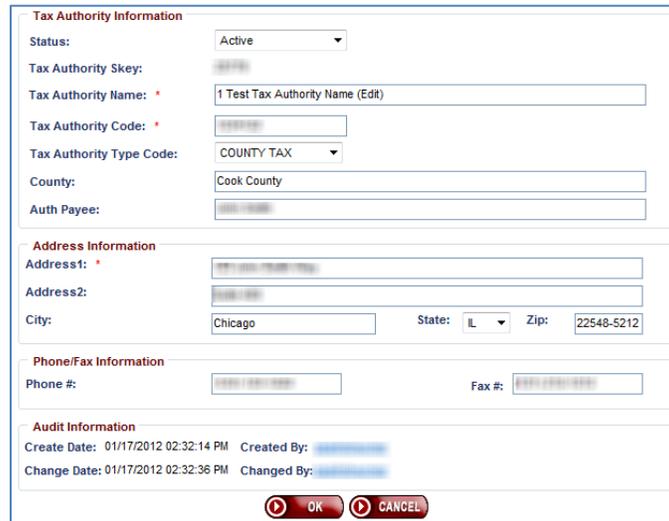
- Status
- Tax Authority Name(required)
- Tax Authority Code
- Tax Authority Type Code
- County
- Auth Payee
- Address1 (required)
- Address2
- City
- State
- Phone

Step 3. Click **OK**.

10.11.4 Editing a Tax Authority

All fields except for audit information and Tax Authority Skey can be edited.

Step 1. Click on a record in the table and the **Tax Authority** screen will be displayed.



The screenshot shows a web form for editing a Tax Authority record. The form is divided into several sections:

- Tax Authority Information:** Includes a Status dropdown menu (set to 'Active'), a Tax Authority Skey field (disabled), a Tax Authority Name field (containing '1 Test Tax Authority Name (Edit)'), a Tax Authority Code field (disabled), a Tax Authority Type Code dropdown menu (set to 'COUNTY TAX'), a County field (containing 'Cook County'), and an Auth Payee field (disabled).
- Address Information:** Includes Address1 and Address2 fields (disabled), a City field (containing 'Chicago'), a State dropdown menu (set to 'IL'), and a Zip field (containing '22548-5212').
- Phone/Fax Information:** Includes Phone # and Fax # fields (disabled).
- Audit Information:** Includes Create Date (01/17/2012 02:32:14 PM), Created By, Change Date (01/17/2012 02:32:36 PM), and Changed By.

At the bottom of the form are two buttons: 'OK' and 'CANCEL'.

Figure 10-28: Editing a Tax Authority

Step 2. Modify the information you need to edit and click the **OK** button. The **Tax Authority** tab record table with the edited record will be displayed in the table.

10.12 Vendors Screen

This screen allows the authorized user to add new Vendors, edit or inactivate a Vendor. Vendors can be any contractors that provide a service on the mortgaged property (property management companies, appraisers, etc.). You cannot delete a vendor. A vendor that should no longer be used should be changed to Inactive.

STORM
Servicing Technology on Reverse Mortgages

Welcome: [User] Edit Profile Help
Today is: Tuesday, January 17, 2012

> Admin > Vendor Search

Home Loan Assigned Endorsed Accounting Reports Admin Logout

Alerts
Announcements
Authorized Person
County Clerks
Helpful Links
Investor
Lender
Lender Links
Servicer
Petitioner
Tax Authority
Vendors

Vendor Filter

Vendor Type: --ALL-- State: --ALL--
Vendor Name: Status: --ALL--

FILTER CLEAR NEW

Vendor Results

Export to Excel Text Color = Inactive Record

| Vendor Key | Vendor Type | Vendor Name | Tax Id | Address1 |
|------------|-------------|-------------|--------|----------|
| 10 | Other | ... | ... | ... |
| 11 | Other | ... | ... | ... |
| 12 | Other | ... | ... | ... |
| 13 | Other | ... | ... | ... |
| 14 | Other | ... | ... | ... |
| 15 | Other | ... | ... | ... |
| 16 | Other | ... | ... | ... |
| 17 | Other | ... | ... | ... |
| 18 | Other | ... | ... | ... |
| 19 | Other | ... | ... | ... |
| 20 | Other | ... | ... | ... |

Figure 10-29: Vendors Screen

10.12.1 Filtering Vendors

Vendors can be filtered on one or more of four criteria:

- Type
- Name
- State
- Status

10.12.2 Sorting Vendors

Vendors can be sorted by:

- Status
- Vendor Name
- Servicer
- Vendor Type
- Department
- Contact Name
- Tax ID
- Address1
- Address2
- City
- State
- Zip
- Phone #

- Fax #
- Email
- Website URL
- License #
- License State

10.12.3 Creating a Vendor

To create a vendor:

Step 1. Click **New**. The **Vendor** screen will display so the user can add a new Vendor.

The screenshot shows a 'Vendor' form with the following fields and values:

- Vendor Information:** Status: Active; Vendor Name: 1 Test Vendor; Servicer: (dropdown); Vendor Type: Utility; Department: Department Vendor; Contact Name: (text); Tax Id: (text).
- Address Information:** Address1: (text); Address2: (text); City: Denver; State: CO; Zip: 12456-2351.
- Phone/Fax Information:** Phone #: (text); Fax #: (text); Email: (text); Website Url: http://www.testvendor1.com.
- License Information:** License #: (text); License State: CO.
- Audit Information:** Create Date: (text); Change Date: (text); Created By: (text); Changed By: (text).

Buttons: OK, CANCEL.

Figure 10-30: Creating a Vendor

Step 2. Enter the following:

- Status
- Vendor Name (required)
- Servicer
- Vendor Type
- Department
- Contact Name
- Tax ID
- Address1 (required)
- Address2
- City
- State
- Zip
- Phone #
- Fax #
- Email
- Website URL
- License #
- License State

Step 3. Click **OK**.

10.12.4 Editing an Existing Vendor

All fields except for audit information and Customer ID can be edited.

Step 1. Click on a record in the table and the edit alerts screen will be displayed.

Vendor Information

Status: Active Customer Id: [REDACTED]

Vendor Name: * 1 Test Vendor (Edit)

Servicer: [REDACTED]

Vendor Type: Utility

Department: Department Vendor

Contact Name: Contact Name

Tax Id: [REDACTED]

Address Information

Address1: * [REDACTED]

Address2: [REDACTED]

City: Denver State: CO Zip: 12456-2351

Phone/Fax Information

Phone #: [REDACTED] Fax #: [REDACTED]

Email: [REDACTED]

Website Uri: http://www.testvendor1.com

License Information

License #: [REDACTED] License State: CO

Audit Information

Create Date: 01/17/2012 02:39:24 PM Created By: [REDACTED]

Change Date: 01/17/2012 02:39:45 PM Changed By: [REDACTED]

OK CANCEL

Figure 10-31: Editing an Existing Vendor

Step 2. Modify the information you need to edit and click the **OK** button. The **Vendor** tab record table with the edited record will be displayed in the table.

APPENDIX A: ACRONYMS

Appendix A. ACRONYMS

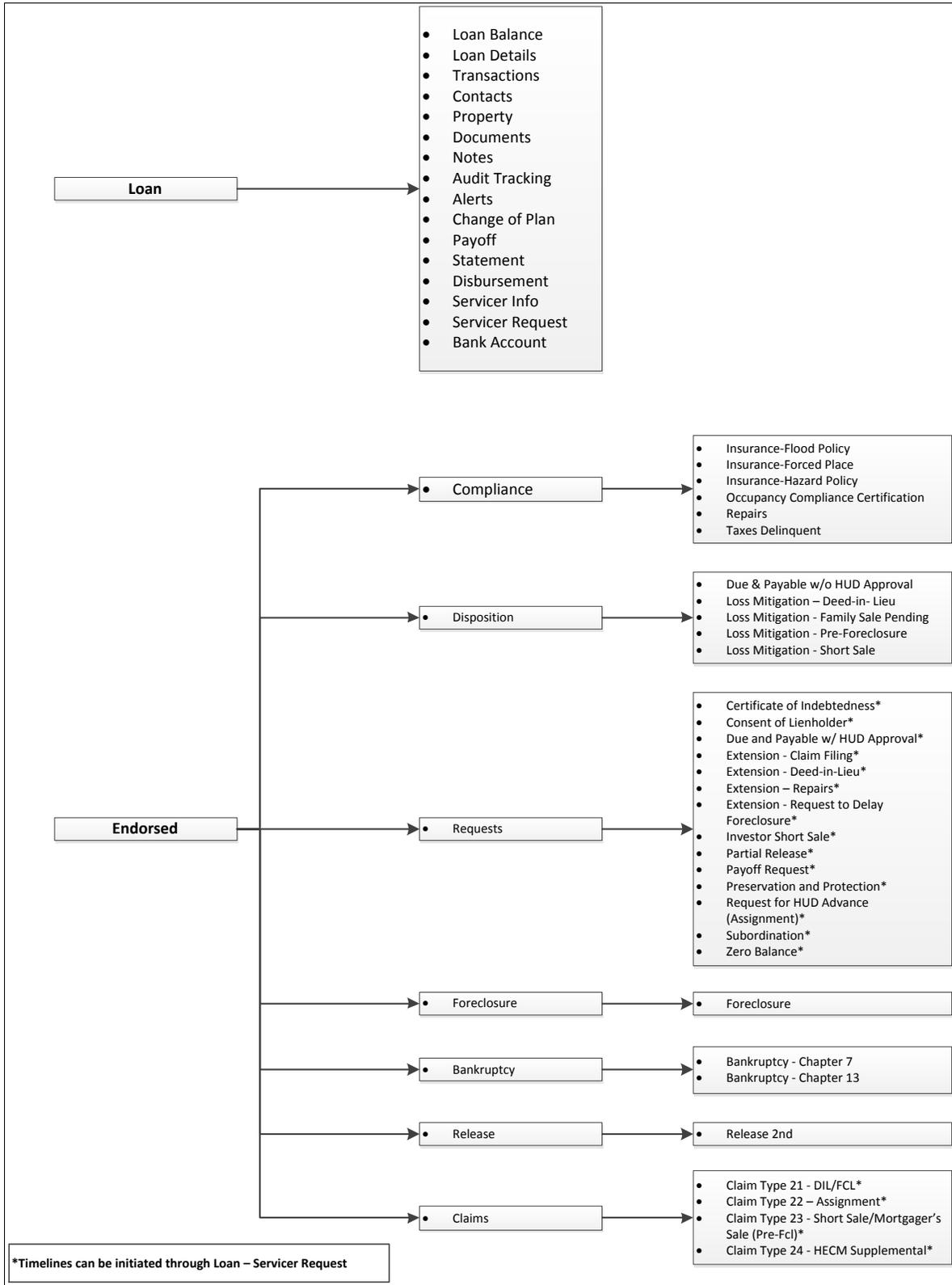
| Acronym | Description |
|----------------|--|
| AAR | Applicant Access Request. |
| ABA | American Bankers Association. |
| ACH | Automated Clearing House. |
| ADJ | Adjustment. |
| ADP | Automatic Data Processing. |
| ARM | Adjustable Rate Mortgage. |
| BANKO | Bankruptcy and Deceased Information. |
| B2G | Business To Government. |
| BPS | Basis Points. |
| BSP | Business Service Provider. |
| CHUMS | Computerized Homes Underwriting Management System. |
| CMB | Cash Management Branch. |
| CMMI | Capability Maturity Model Integration. |
| CMT | Constant Maturity Treasury. |
| COI | Certificate of Indebtedness. |
| COP | Change of Plan. |
| COTS | Commercial-Off-The-Shelf. |
| CT | Claim Type. |
| CWCOT | Claims Without Conveyance of Title. |
| DEO | Data Entry Operator. |
| DIL | Deed-in-Lieu. |
| DOB | Date of Birth. |
| DOJ | Department of Justice. |
| DOT | Deed of Trust. |
| FARETS | First American Real Estate Tax Service. |
| FCL | Foreclosure. |
| FHA | Federal Housing Administration. |
| FHASL | Federal Housing Administration Subsidiary Ledger. |
| FOCS | Financial Operations and Control Section |
| FTP | File Transfer Protocol. |
| GL | General Ledger. |

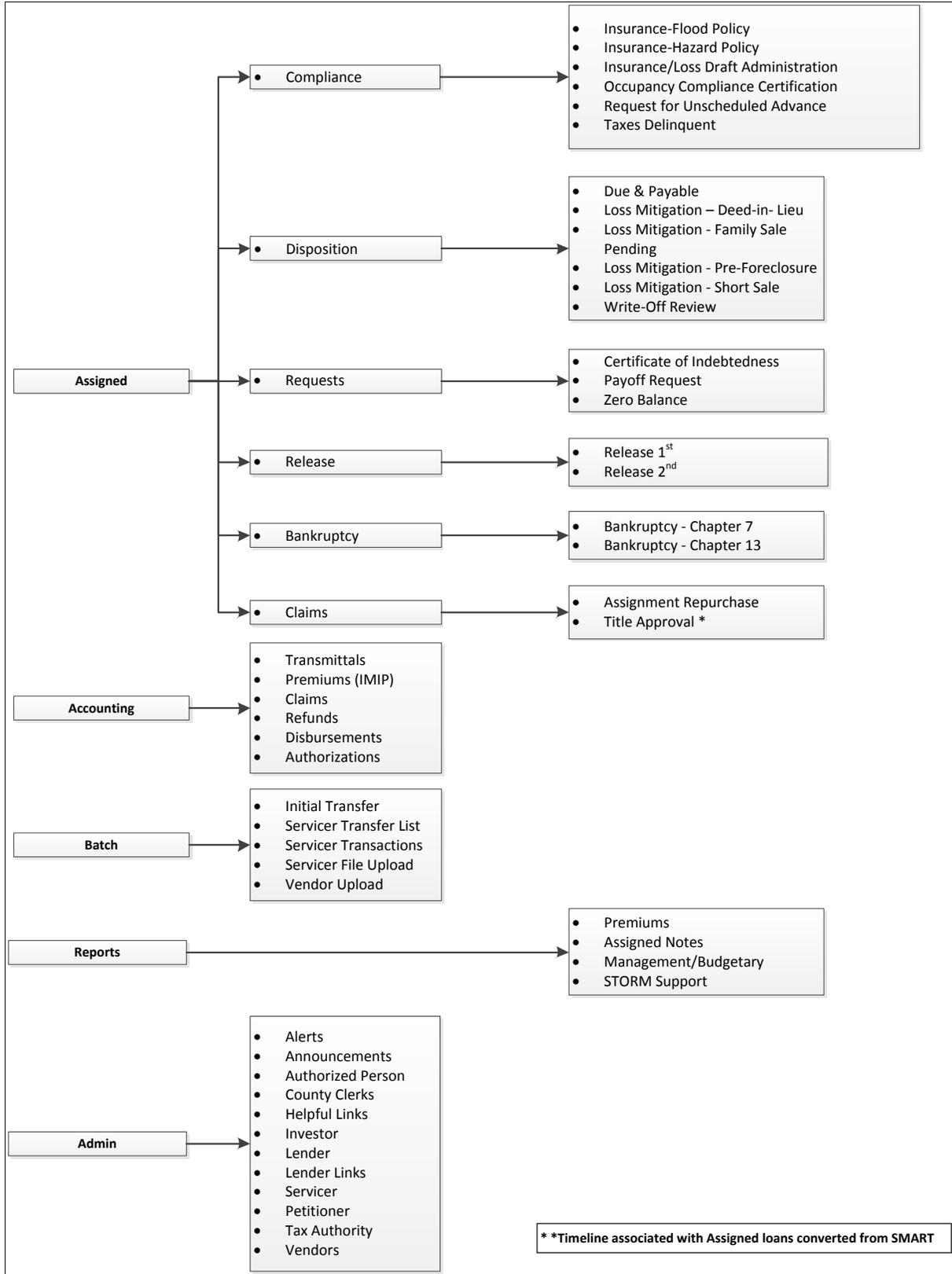
| Acronym | Description |
|---------------------------|--|
| GLD | General Ledger Division. |
| GTM | Government Technical Monitor. |
| HECM | Home Equity Conversion Mortgage. |
| HECM SP | Home Equity Conversion Mortgage Service Provider. |
| HERMIT | Home Equity Reverse Mortgage Information Technology. |
| HITS | HUD Information Technology Service. |
| HOA | Homeowner's Association. |
| HOCs | Homeownership Centers. |
| HUD | U.S. Department of Housing and Urban Development. |
| IACS | Insurance Accounting Collection System. |
| IMIP | Initial Mortgage Insurance Premium. |
| LIBOR | London Interbank Offered Rate. |
| LOC | Line of Credit. |
| LTV | Loan To Value. |
| MCA | Maximum Claim Amount. |
| M&M contractor | Management and Marketing. |
| MIC | Mortgage Insurance Certificate. |
| MIP | Mortgage Insurance Premium. |
| MMI | Mutual Mortgage Insurance. |
| MMIP | Monthly Mortgage Insurance Premium. |
| MTH-SF | Monthly Service Fee. |
| NACHA | National Automated Clearinghouse Association. |
| NJF | Non Judicial Foreclosure. |
| NPL | Net Principal Limit. |
| NSC | National Servicing Center. |
| NSF | Non-Sufficient Funds. |
| OMB | Office of Management and Budget. |
| PC | Personal Computer. |
| PCC-OTC | Paper Check Conversion Over The Counter. |
| P&P | Property and Preservation. |
| PDF | Portable Document Format. |
| PMI | Private Mortgage Insurance. |
| POA | Power of Attorney. |
| QSSI | Quality Software Services Inc. |

| Acronym | Description |
|------------------|---|
| REKON | A lien release software application. |
| REO | Real Estate Owned. |
| RFS | Reporting and Feedback System. |
| RMS | Reverse Mortgage Solutions Inc. |
| SAMS | Single Family Acquired Asset Management System. |
| SF | Single Family. |
| SFHEDW | Single Family Housing Enterprise Data Warehouse. |
| SFTP | Secure File Transfer Protocol. |
| SMART | Single Family Mortgage Asset Recovery Technology. |
| SOA | Section of the Act. |
| SP | Service Provider. |
| SPS | Secure Payment System. |
| SSN | Social Security Number. |
| STORM | Servicing Technology on Reverse Mortgages. |
| T & I | Tax and Insurance. |
| UPB | Unpaid Principal Balance. |
| URL | Uniform Resource Locator. |

APPENDIX B: SERVICING MODULE MENU MAP

Appendix B. SERVICING MODULE MENU MAP





APPENDIX C: HERMIT USER GUIDE VERSION 2.8 UPDATES (RELEASE 4.1)

Appendix C. HERMIT USER GUIDE VERSION 2.8 UPDATES (Release 4.1)

| Item No. | Description |
|----------|---|
| 1. | Updated Fig-2-13 -The Life Expectancy Set Aside (LESA) fields are now displayed in the Loan Balance Screen |
| 2. | Updated Fig-2-14 -The Life Expectancy Set Aside (LESA) fields are now displayed in the Loan Balance Screen |
| 3. | Updated Fig-4-2 - The Life Expectancy Set Aside (LESA) fields are now displayed in the Loan Set Up Screen |
| 4. | Updated Section 4.2.2.8 to add Life Expectancy Set Aside |
| 5. | Added New Section 4.2.2.9 to list the details of data fields within Life Expectancy Set Aside (LESA) |
| 6. | Updated Section 5.5.1.5 to include Disb-Life Expectancy Set Aside |
| 7. | Updated table 5-5 Disbursement Transactions to include Disb-Life Expectancy Set Aside |
| 8. | Added New Section 5.5.1.10.3 Repayment of Life Expectancy Set Aside (LESA)-(ENDORSED) |
| 9. | Added Fig 5-24 -Repays LESA Transaction window |
| 10. | Added Table 5-9 LESA Repay Transaction |
| 11. | Added New Section 5.5.4 Viewing Life Expectancy Set Aside Growth Transaction |
| 12. | Added Fig-5-34 Viewing LESA Growth Transaction |
| 13. | Updated Fig-5.40 Deactivate a Non Borrowing Spouse to display the field "Eligible" renamed as "Eligible NBS" |
| 14. | Updated 5.6.6 Added the word Eligible preceding NBS |
| 15. | Added New Section 5.6.7 Adding a Non Borrowing Spouse |
| 16. | Added New Section 5.6.8 Editing a Non Borrowing Spouse Contact |
| 17. | Updated Fig 5-66 -View Monthly Statement Screen to display the LESA fields added to the Monthly Statement Details |
| 18. | Added New Section 6.3.3 Activating or Suspending Life Expectancy Set Aside (LESA) Payments |
| 19. | Added Fig-6-10 LESA Payment Plan Information Section |
| 20. | Added Fig-6-11 Edit LESA Payment Plan Window |
| 21. | Added New Section 6.5.1.7 Life Expectancy Set Aside (LESA) Repays -(ASSIGNED) |
| 22. | Added Fig-6-25 Repays LESA Transaction Window |
| 23. | Added Table 6-5 LESA Repays Transaction |
| 24. | Updated Fig-6.41 Deactivate a Non Borrowing Spouse to display the field "Eligible" renamed as "Eligible NBS" |
| 25. | Updated 6.6.6 Added the word Eligible preceding NBS |
| 26. | Added new Section 6.6.7 Adding a Non Borrowing Spouse Contact |
| 27. | Added new Section 6.6.8 Editing a Non Borrowing Spouse Contact |

| Item No. | Description |
|----------|--|
| 28. | Updated Fig 6-77 View Monthly Statement Screen to display the LESA fields added to the Monthly Statement Details |
| 29. | Added New Section 6.15.8 Performing a Life Expectancy Set Aside Disbursement |
| 30. | Added New Section 6.19.2.5 Reprint Void Check |
| 31. | Added Fig 6-101 Reprint Check(s) Message |
| 32. | Added Fig 6-102 Printer Paper Message |
| 33. | Updated Fig 7-36 Timelines Steps-Endorsed Due and Payable w/o HUD Approval to display the sequence of timeline steps. |
| 34. | Updated Fig 7-40 Edit Servicing Management-Endorsed Due and Payable w/o HUD Approval to display the new sequence of timeline steps. |
| 35. | Updated Fig 7-41 Timeline Steps-Endorsed Due and Payable w/o HUD Approval to display the sequence of timeline steps. |
| 36. | Updated Section 7.2.2.5 Loss Mitigation Pre Foreclosure Step 8 and Step 10 to include renamed step "Servicer Prepares Foreclosure Document" |
| 37. | Updated Fig-7-58 Timeline Steps-Endorsed Pre-Foreclosure to display the sequence of timeline steps |
| 38. | Updated Fig-7-59 Edit-Step to Endorsed Pre-Foreclosure to display the step "Servicer Prepares Fcl Checklist/HUD Form renamed as "Servicer Prepares Foreclosure Documents" |
| 39. | Updated Fig 7-65 Edit Servicing Management -Endorsed Foreclosure to display renamed step "Sale/Refer to REO to "Foreclosure Sale Date" and display the new sequence of timeline steps. |
| 40. | Updated Fig-66 Timeline Steps-Endorsed Foreclosure to display renamed step "Sale/Refer to REO to "Foreclosure Sale Date" and display the new sequence of timeline steps. |
| 41. | Updated Fig 7-87 Edit Servicing Management Screen- Endorsed Due and Payable w/ HUD Approval to display the new sequence of timeline steps. |
| 42. | Updated Fig-7-88 Timeline Steps -Endorsed Due and Payable w/ HUD Approval to display the new sequence of timeline steps. |
| 43. | Updated Fig- 7-92 Edit Servicing Management Screen -Endorsed Claim Filing -Steps were arranged as per calendar days |
| 44. | Updated Fig- 7-93 Timeline Steps -Endorsed Claim Filing -Steps were arranged as per calendar days |
| 45. | Added New Section 7.3.1.14 Extension-Late Notification of Death |
| 46. | Added Fig-7-146 Setup Search-Endorsed-Late Notification of Death |
| 47. | Added Fig-7-147 Edit Servicing Management Screen-Endorsed Late Notification of Death |
| 48. | Added Fig-7-148 Timeline Steps-Endorsed Late Notification of Death |
| 49. | Added Fig-7-149 Edit Step Window-Endorsed Late Notification of Death |
| 50. | Added Fig-7-150 Edit Step- Endorsed Late Notification of Death |
| 51. | Added Fig-7-151 New Step-Endorsed Late Notification of Death |
| 52. | Added New Section 7.3.1.15 Extension-Hardest Hit Fund |
| 53. | Added Fig-7-152 Setup Search-Endorsed-Hardest Hit Fund |

| Item No. | Description |
|----------|---|
| 54. | Added Fig-7-153 Edit Servicing Management Screen-Endorsed Hardest Hit Fund |
| 55. | Added Fig-7-154 Timeline Steps-Endorsed Hardest Hit Fund |
| 56. | Added Fig-7-155 Edit Step Window-Endorsed Hardest Hit Fund |
| 57. | Added Fig-7-156 Edit Step- Endorsed Hardest Hit Fund |
| 58. | Added Fig-7-157 New Step-Endorsed Hardest Hit Fund |
| 59. | Added New Section 7.3.1.16 Extension-Property Charge Loss Mitigation |
| 60. | Added Fig-7-158 Setup Search-Endorsed-Property Charge Loss Mitigation |
| 61. | Added Fig-7-159 Edit Servicing Management Screen-Endorsed Property Charge Loss Mitigation |
| 62. | Added Fig-7-160 Timeline Steps-Endorsed Property Charge Loss Mitigation |
| 63. | Added Fig-7-161 Edit Step Window-Endorsed Property Charge Loss Mitigation |
| 64. | Added Fig-7-162 Edit Step- Endorsed Property Charge Loss Mitigation |
| 65. | Added Fig-7-163 New Step-Endorsed Property Charge Loss Mitigation |
| 66. | Added New Section 7.3.1.17 Extension-Appraisal |
| 67. | Added Fig-7-164 Setup Search-Endorsed-Appraisal |
| 68. | Added Fig-7-165 Edit Servicing Management Screen-Endorsed Appraisal |
| 69. | Added Fig-7-166 Timeline Steps-Endorsed Appraisal |
| 70. | Added Fig-7-167 Edit Step Window-Endorsed Appraisal |
| 71. | Added Fig-7-168 Edit Step- Endorsed Appraisal |
| 72. | Added Fig-7-169 New Step-Endorsed Appraisal |
| 73. | Added New Section 7.3.1.18 Extension-Other |
| 74. | Added Fig-7-170 Setup Search-Endorsed-Other |
| 75. | Added Fig-7-171 Edit Servicing Management Screen-Endorsed Other |
| 76. | Added Fig-7-172 Timeline Steps-Endorsed Other |
| 77. | Added Fig-7-173 Edit Step Window-Endorsed Other |
| 78. | Added Fig-7-174 Edit Step- Endorsed Other |
| 79. | Added Fig-7-175 New Step-Endorsed Other |
| 80. | Added a Note to section 8.3.7.2 |
| 81. | Added additional steps for Assignment Denied- No Funds Due HUD Section 8.3.7.2 |

APPENDIX D: HERMIT USER GUIDE VERSION 2.9 UPDATES (RELEASE 4.2)

Appendix D. HERMIT User Guide Version 2.9 Updates (Release 4.2)

| Item No. | Description |
|----------|--|
| 1. | Added Pay Plan Type to Table 2-2 - Loan Search Criteria |
| 2. | Added Repayment Plan to Table 2-4 - Description of the Servicing Module Side Menu Bar |
| 3. | Updated Fig-2-13 -The Loan Balance Screen - Example of the Top Menu Bar |
| 4. | Updated Fig-2-14 -The Loan Balance Screen - Example of the Side Menu Bar |
| 5. | Update Section 3.3 to include user roles for Repayment Plan |
| 6. | Update Section 3.7 to include user roles for Repayment Plan |
| 7. | Update Section 3.8 to include user roles for Repayment Plan |
| 8. | Updated Table 4-2 Credit Type Mandatory - Data Fields - Rates Information Section |
| 9. | Updated Fig 4-2 - Loan Setup Screen to display Credit Type field as mandatory |
| 10. | Added Lump Sum to Pay Plan Type Section 4.2.2.6 |
| 11. | Removed Note from Pay Plan Type Section 4.2.2.6 |
| 12. | Added New Balance Adjustment Section 5.5.1.14 |
| 13. | Added Fig 5.29 -Adjust Loan Balance Window |
| 14. | Added Fig 5.30 -Loan Balance Adjustment Transaction |
| 15. | Updated Section 5.12 - Change of Plan with pay |
| 16. | Added New Section 5.20 Repayment Plan |
| 17. | Added Sub-Section 5.20.1 Viewing a Repayment Plan |
| 18. | Added Sub-Section 5.20.2 Creating a New Repayment Plan |
| 19. | Added Sub-Section 5.20.3 Editing a Repayment Plan |
| 20. | Added Fig 5-97 Repayment Plan Screen |
| 21. | Added Fig 5-98 View Repayment Plan Screen |
| 22. | Added Fig 5-99 New Repayment Plan Window |
| 23. | Added Fig 5-100 New Repayment Plan Displayed on Repayment Plans Section |
| 24. | Added Fig 5-101 Edit Repayment Plan Window |
| 25. | Added a Note that Lump Sum Pay Plan Type cannot be changed to Section 6.12 - Change Of Plan |
| 26. | Added a Note that user cannot change from any existing Pay Plan to Lump Sum to Section 6.12 - Change Of Plan |
| 27. | Added New Section 6.21 Repayment Plan |
| 28. | Added Sub-Section 6.21.1 Viewing a Repayment Plan |
| 29. | Added Sub-Section 6.21.2 Creating a New Repayment Plan |
| 30. | Added Sub-Section 6.21.3 Editing a Repayment Plan |
| 31. | Added Fig 6-112 Repayment Plan Screen |

| Item No. | Description |
|-----------------|--|
| 32. | Added Fig 6-113 View Repayment Plan Screen |
| 33. | Added Fig 6-114 New Repayment Plan Window |
| 34. | Added Fig 6-115 New Repayment Plan Displayed on Repayment Plans Section |
| 35. | Added Fig 6-116 Edit Repayment Plan Window |
| 36. | Added Note to Section 8.3 - Initiating and Submitting Claim Type 22 to mention about Corp Advance and Pre D&P transaction. |
| 37. | Updated Fig 8-7 - Claims Worksheet for CT21 |
| 38. | Updated Fig 8-28 - Claims Worksheet for CT23 |
| 39. | Updated Section 9.7 to include Repayment Plan Report |
| 40. | Added New Section 9.7.4 for Repayment Plan Report |
| 41. | Added Fig 9.35 Repayment Plan Report |

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