

# Loan Coverage Advisor®

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## December 2025 Release Notes

Loan Coverage Advisor® Release Notes provide updates on enhancements designed to simplify reconciliation, enable robust reporting and offer an easy-to-use experience for managing your portfolio and rep and warranty obligations.

### Angular User Interface Upgrade

#### Effective December 6

The Loan Coverage Advisor technology change on December 6, 2025 includes the following updates:

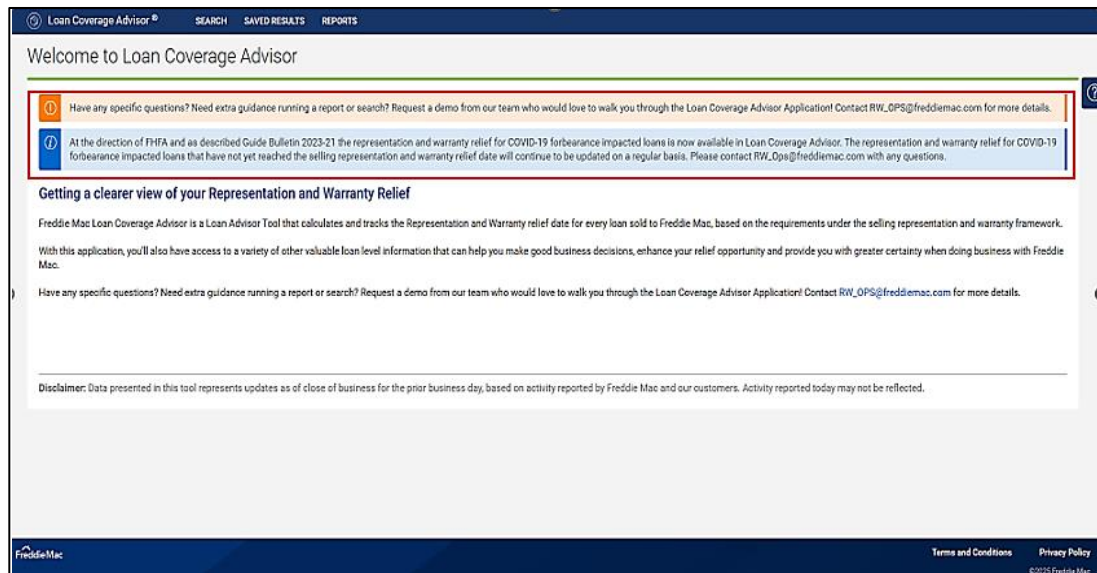
- External and Internal User Interface
- Minor feature enhancements (FM Import list with credit enhancement (CE) search criteria, Error Validations & Work Order page screens)
- Microservice technology implementation to enable future system changes easier and quicker

Below are sample screenshots applicable for internal and external users.

#### 1. Menu Ribbon Tab Order (Internal and External Users)



#### 2. Homepage: Communications Display Moved to the Top (Internal and External Users)





### 3. Search Parameters (Internal and External Users)

Single/multiple Freddie Mac loan number, Seller/Servicer number, Seller loan number, Servicer loan number and master commitment number:

- Dropdown buttons replaced by radio buttons
- Advanced search criteria displayed in the Search page

Loan Coverage Advisor® SEARCH SAVED RESULTS REPORTS WORK ORDERS

## Search Loan Data

Select Search Parameter

☒ Single ☐ Multiple/Import List

Search By

☒ FM Loan Number ☐ Seller/Servicer Number ☐ Seller Loan Number ☐ Servicer Loan Number ☐ Master Commitment Number

Search Criteria Entry

FM Loan Number \* (7 digits)

Type here...

SEARCH RESET

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### 4. CE Search Criteria (Internal and External Users)

Loan Coverage Advisor® SEARCH SAVED RESULTS REPORTS

## Search Loan Data

Select Search Parameter

☒ Single ☐ Multiple/Import List

Search By

☐ FM Loan Number ☒ Seller/Servicer Number ☐ Seller Loan Number ☐ Servicer Loan Number ☐ Master Commitment Number

Search Type

☐ Basic ☒ CE ☐ Events ☐ Priority M ☐ BQR Relief

Search Criteria Entry

Seller/Servicer Number \* (8 digits)

Type here...

Loan Status Type

☒ All ☐ Active Loans ☐ Closed Loans

Loan Pending Date

Select

Credit Enhancements

Search for loans with Credit Enhancements by selecting one or more of the following options.

CE Types \* Choose one or more of the following Credit Enhancements Types.

Select

MI Company

Select

MI Policy Number

Type here...

☐ Include loans with inactive CE

SEARCH RESET

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## 5. Events Search Criteria (Internal and External Users)

**Search Loan Data**

Select Search Parameter  
☒ Single ☐ Multiple/Import List

Search By  
☐ PMI Loan Number ☒ Seller/Service Number ☐ Seller Loan Number ☐ Servicer Loan Number ☐ Master Commitment Number

Search Type  
☐ Basic ☐ CE ☒ Events ☐ Primary MI ☐ R&W Relief

**Search Criteria Entry**

Seller/Service Number \* (8 digit)  
 Type here...

Loan Status Type  
☒ All ☐ Active Loans ☐ Closed Loans

Loan Funding Date  
 Select

**Events**  
 Search for loans by selecting one of the Event Types below and defining a date range.

Event Type \*  
 Select

Sub-Event Type \*  
 Select

Business Event Date \*  
 Select

SEARCH RESET

FOOTNOTES  
 \* Representation and Warranty

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## 6. Private Mortgage Insurance (PMI) (Internal and External Users)

**Search Loan Data**

Select Search Parameter  
☒ Single ☐ Multiple/Import List

Search By  
☐ PMI Loan Number ☒ Seller/Service Number ☐ Seller Loan Number ☐ Servicer Loan Number ☐ Master Commitment Number

Search Type  
☐ Basic ☐ CE ☐ Events ☒ Primary MI ☐ R&W Relief

**Search Criteria Entry**

Seller/Service Number \* (8 digit)  
 Type here...

Loan Status Type  
☒ All ☐ Active Loans ☐ Closed Loans

Loan Funding Date  
 Select

**Primary MI**  
 Search for loans with Primary MI by selecting one or more of the following options.

MI Family Companies \* (Choose one or more)  
 Select

Identification Number  
 Type here...

MI Coverage %  
 Select

MI Status (By default only loans with Active MI are included in Search Results)  
☐ Include loans with Inactive MI

SEARCH RESET

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## 7. Representation and Warranty (R&W) Search Criteria (Internal and External Users)

Search Loan Data

Select Search Parameter  
☒ Single ☐ Multiple/Upon List

Search By  
☐ EMV Loan Number ☒ Active/Reactive/Inactive ☐ Active/Loan Number ☐ Service Loan Number ☐ Master Commitment Number

Search Type  
☐ Basic ☐ CE ☐ Events ☐ Primary MI ☒ R&W Relief

Search Criteria Entry

Search/Service Number \* (3 digits)  
Type here...

Loan Status Type  
☒ All ☐ Active Loans ☐ Closed Loans

Loan Funding Date  
Select

R&W\* Relief Date Options  
You may select search criteria for Selling R&W\* Period, Selling R&W\* Relief Date or both.

Selling R&W\* Type \*  
Select

Selling R&W\* Period  
Select

Selling R&W\* Relief Date  
Select

Loan Advisor R&W\* Relief Offerings (includes loans granted relief for select coverage)  
☐ Collateral ☐ Asset ☐ Income

SEARCH RESET

FOOTNOTE  
\*Representation and Warranty



## 8. Loan Risk Details Page (Internal and External Users)

Loan Coverage Advisor

SEARCH

DATA RELAYS

REPORTS

WORKBOOKS

Loan Risk Details for FM Loan

Seller	Delivery	Servicer	Servicing
SELLER NAME	LOAN ACQUISITION DATE	SERVICER NAME	MATURITY DATE
	12/13/2017		11/01/2059
SELLER NUMBER	LOAN PRODUCT	SERVICER NUMBER	GROSS UPB
	ARM Fixed Conv		\$223,946.18
SELLER LOAN NUMBER	DELIVERY METHOD	SERVICER LOAN NUMBER	DIFFERENTIATION SERVING TYPE
	Flow		Full
MASTER COMMITMENT NUMBER	DIFFERENTIATION DELIVERY TYPE		LOAN STATUS
	None		Closed
	PARTICIPATION %		
	100		
	POST SETTLEMENT FFO		
	01/01/2018		

Credit Risk Offsets

Selling and Servicing R&W\*

MI

CE

Selling Responsible Party

POSITION	OBLIGOR NAME	OBLIGOR NUMBER	START DATE	END DATE	
1			12/13/2017	-	

Servicing Responsible Party

POSITION	OBLIGOR NAME	OBLIGOR NUMBER	START DATE	END DATE	PLANNED RELIEF DATE
1			09/01/2019	-	Life of Loan

INTERIM SERVICER

No

Loan Advisor R&W\* Relief Offerings

CAPACITY R&W\* RELIEF

Asset -

Income -

COLLATERAL R&W\* RELIEF

ELIGIBLE Traditional Appraisal

CREDIT R&W\* RELIEF

N/A

Current Coverage

SELLING R&W\* RELIEF PERIOD

36 Months

SELLING R&W\* RELIEF DATE

01/01/2021

R&W\* RELIEF INDICATED

Yes

Current Coverage

SELLING R&W\* RELIEF PERIOD

36 Months

SELLING R&W\* RELIEF DATE

01/01/2021

R&W\* RELIEF INDICATED

Yes

TYPE	PLANNED RELIEF DATE	ACTUAL RELIEF DATE	PERIOD	FUNDING DATE TO MATURITY DATE
Credit	01/01/2021	04/29/2018	36 Months	
Capacity	01/01/2021	04/29/2018	36 Months	
Asset	01/01/2021	04/29/2018	36 Months	
Income	01/01/2021	04/29/2018	36 Months	
Collateral	12/13/2017	12/13/2017	0 Months	
Exclusion	Life of Loan	-	Life of Loan	

## 9. Freddie Mac Loan Import Search (Internal and External Users)

December 2025 | PUBLIC

## 10. Freddie Mac Import with CE Search Criteria (Internal and External Users)

The screenshot shows the 'Search Loan Data' interface. A red rectangular box highlights the 'Search Criteria Entry' section. This section includes a 'Loan Status Type' dropdown with 'All' selected, a 'Loan Funding Date' dropdown with 'Select' selected, and a 'Create Enhancements' section. The 'Create Enhancements' section contains a 'Loan Type' dropdown with 'Select' selected, a 'Loan Number' dropdown with 'Select' selected, and a 'Loan ID' dropdown with 'Select' selected. Below these are checkboxes for 'Include loans with inactive ID' and 'Include loans with inactive ID'. At the bottom of the red box are 'SEARCH' and 'NEXT' buttons. The interface also features a 'Filter' button in the top right corner and a 'Reset' button in the bottom right corner.

11. **Saved Results Page:** New ZIP file option for loan searches record count that is more than 1M (internal and external users)

Saved Results				
Select an action to download, re-run or delete a saved search. Please note that expired results shall be removed after 90 days.				
TOTAL	AVAILABLE	ERROR	EXPIRED	IN PROGRESS
113	90	3	18	2
DETAILS		CRITERIA		
October 23, 2025 02:00 PM		Seller/Service Number		
Expires in 9 days		Loan Status		
90,845 Records		Closed		
		Loan Funding Date		
		is after 01/01/2000		
		Event Type		
		Loan Closed		
		Sub-Event Type		
		All		
		Business Event Date		
		is more than 01/01/2024		
October 23, 2025 01:21 PM		Seller/Service Number		
Expires in 9 days		Loan Status		
2,151,725 Records		Active & Closed		
October 23, 2025 01:18 PM		Seller/Service Number		
Expires in 9 days		Loan Status		
1,921,229 Records		Active & Closed		
October 23, 2025 10:31 AM		Seller/Service Number		
Expires in 9 days		Loan Status		
113,993 Records		Closed		
		CE Types		
		TSTLOSS, CASH, COPRIME, CPA, ENCPA, ENSPREAD, IMAGIN, INDEMN, INVPODPM, MIPOOL, MODERNS, RECOURSE, SMC, SPREAD		



## 12. Reports – Homepage (Internal and External Users)

The screenshot shows the 'Reports Main Menu' for the Loan Coverage Advisor. The header includes the Freddie Mac logo, 'Loan Coverage Advisor', and a 'Help' icon. The navigation bar contains 'Loan Coverage Advisor', 'SEARCH', 'SAVED RESULTS', 'REPORTS' (highlighted), and 'WORK ORDERS'. The main content area is titled 'Reports Main Menu' and lists several report categories:

- Planned Relief**
  - [Newly Funded Loans Report](#)  
The Newly Funded Loans Report provides loan and Selling Representation & Warranty information on the loans funded within a specified time period.
  - [Planned Relief Date Trend Report](#)  
The Planned Relief Date Trend Report compares the Selling Representation & Warranty relief date changes for specific loan events over a period of two months.
- Actual Relief**
  - [Selling Representation & Warranty Relief Date Report](#)  
The Selling Representation & Warranty Relief Date Report provides a list of loans conditionally meeting the requirements for relief under the Selling Representation & Warranty framework for a specified month.
- Internal Work Order Reports**
  - [Settlement Reports](#)  
Generate reports summarizing R/W Settlement and MI Settlement work orders within the specific time period.
  - [Transfer Summary Reports](#)  
Generate reports summarizing Transfer of Servicing Work Orders within the specified time period.
  - [Manual Update Reports](#)  
Generate reports summarizing Manual Update Work Orders within the specified time period.

The footer includes the Freddie Mac logo, 'Terms and Conditions', 'Privacy Policy', and '©2025 Freddie Mac'.

This screenshot shows the 'Reports Main Menu' with additional report categories compared to the previous one. The layout is consistent, including the header, navigation bar, and footer. The main content area lists:

- Planned Relief**
  - [Newly Funded Loans Report](#)  
The Newly Funded Loans Report provides loan and Selling Representation & Warranty information on the loans funded within a specified time period.
  - [Planned Relief Date Trend Report](#)  
The Planned Relief Date Trend Report compares the Selling Representation & Warranty relief date changes for specific loan events over a period of two months.
- Actual Relief**
  - [Selling Representation & Warranty Relief Summary Report](#)  
The Selling Representation & Warranty Relief Summary Report provides an overall and quarterly summation of Representation & Warranty Relief for the entire portfolio for the selected seller numbers.
  - [Selling Representation & Warranty Relief Date Report](#)  
The Selling Representation & Warranty Relief Date Report provides a list of loans conditionally meeting the requirements for relief under the Selling Representation & Warranty framework for a specified month.
- Reconciliation**
  - [Selling Representation & Warranty Relief Reconciliation Report](#)  
The Selling Representation & Warranty Relief Reconciliation Report provides information on loans with recent coverage-impacting events that granted retroactive relief, revoked relief or changed the relief date.
  - [Obligation Reconciliation Report](#)  
The Obligation Reconciliation Report provides information on loans with recent obligation-impacting events that transferred loans into or out of the selected portfolio.

The footer includes the Freddie Mac logo, 'Terms and Conditions', 'Privacy Policy', and '©2025 Freddie Mac'.







#### 14. Reports – Planned Relief Date Trend Report Summary - PDF only and no Excel version (Internal and External Users)

### Planned Relief Date <sup>1</sup> Trend Report Summary

**Seller Number** [REDACTED]

**Seller Name** [REDACTED]

**Report Generated On** 11/03/2025 6:41:36 PM

**Based on Reported Data for the Period of** 08/01/2025 to 09/30/2025

#### Report Summary

Active Loans as of Month End - August 2025		Active Loans as of Month End - September 2025	
R&W <sup>2</sup> Period	Number of Loans	R&W <sup>2</sup> Period	Number of Loans
12 Months	4	12 Months	4
36 Months	118,396	36 Months	117,736
60 Months	0	60 Months	0
<u>Life of Loan</u>	<u>13,329</u>	<u>Life of Loan</u>	<u>13,369</u>
<b>Total</b>	<b>131,729</b>	<b>Total</b>	<b>131,109</b>

Not included in this count are: (i) loans that have been paid off and (ii) loans with respect to which Freddie Mac will not exercise its remedies for a breach of the selling representations and warranties enumerated in Guide Section 1301.11.

**Planned R&W <sup>2</sup> Period <sup>3</sup> Changes Due To Delinquency / Delinquency Reporting Corrections**

#### 15. Report - Relief Date Report (Internal and External Users)

### Selling Representation & Warranty Relief Date Report

#### Select Report Parameters

To retrieve the latest version of this report in PDF format, enter a Seller Number, choose a reporting period and select Generate Report.

**Seller Number** \* (6-digits)

Type here...

**Date Range** | Selected: 0 days \*

mm/dd/yyyy - mm/dd/yyyy

GENERATE REPORT



## 16. Report - Relief Summary Report (External Users)

Loan Coverage Advisor® SEARCH SAVED RESULTS **REPORTS**

### ← Selling Representation & Warranty Relief Summary Report

Select Report Parameters

Select Seller Number(s) \*

Select

Type to search...

☐ Select All (31)

☐

☐

☐

GENERATE REPORTS

## 17. Reports – Settlement Reports (Internal Users)

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Loan Coverage Advisor® SEARCH SAVED RESULTS **REPORTS** WORK ORDERS

### ← Settlement Reports

Select Report Parameters

Choose a Report \*

Select

Settlement Summary Report

MI Settlement Summary Report

Settlement Period | Selected 0 days \*

mm/dd/yyyy - mm/dd/yyyy

GENERATE REPORT

## 18. Reports - Transfer of Servicing (Internal Users)

Loan Coverage Advisor® SEARCH SAVED RESULTS **REPORTS** WORK ORDERS

### ← Transfer of Servicing

Select Report Parameters

Choose a Report \*

Select

Rep & Warrant Transfer of Servicing Work Orders Report

Rep & Warrant Transfer Summary Report

TOS Period | Selected 0 days \*

mm/dd/yyyy - mm/dd/yyyy

GENERATE REPORT



## 19. Reports – Manual Update Report (Internal Users)

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Loan Coverage Advisor® SEARCH SAVED RESULTS REPORTS WORK ORDERS

### Manual Update Reports

Select Report Parameters

Status \*

Select

Type to search...

- ☐ Select All (6)
- ☐ Approved
- ☐ Cancelled
- ☐ Completed

Creation Date [Selected: 0 days]

mm/dd/yyyy - mm/dd/yyyy

GENERATE REPORT

## 20. Reports – Selling R&W Recon Report (External Users)

Loan Coverage Advisor® SEARCH SAVED RESULTS REPORTS

### Selling Representation & Warranty Relief Reconciliation Report

**Scheduled Reports**

Scheduled reports are generated on a monthly basis and may not reflect the most current information. To retrieve specific reports, please select the available checkboxes and click Download Selected.

31 record(s) found

SELLER NUMBER	APRIL 2025	MAY 2025	JUNE 2025	JULY 2025	AUGUST 2025	SDPT
89	*	*	*	*	*	N/A
61	*	*	*	*	*	N/A
63	N/A	N/A	N/A	N/A	N/A	N/A
70	N/A	N/A	N/A	N/A	N/A	N/A
96	*	*	*	*	*	N/A
37	*	*	*	*	*	N/A
27	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	*	N/A
24	*	*	*	*	*	N/A
79	*	*	*	*	*	N/A
91	*	*	*	*	*	N/A
41	N/A	N/A	N/A	N/A	N/A	N/A
73	N/A	N/A	N/A	N/A	N/A	N/A
83	N/A	N/A	N/A	N/A	N/A	N/A
38	*	*	*	*	*	N/A
02	*	*	*	*	*	N/A



## 21. Reports – Obligation Recon Report (External Users)

Obligation Reconciliation Report						
<b>Scheduled Reports</b> Scheduled reports are generated on a monthly basis and may not reflect the most current information. To retrieve specific reports, please select the available checkboxes and click Download Selected. <b>21 records(s) found</b>						
REPORT NUMBER	APRIL 2025	MAY 2025	JUNE 2025	JULY 2025	AUGUST 2025	SEPTEMBER
85	-	-	-	-	-	N/A
61	-	N/A	-	-	-	N/A
93	N/A	N/A	N/A	N/A	N/A	N/A
70	N/A	N/A	N/A	N/A	N/A	N/A
96	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24	-	N/A	-	-	-	N/A
79	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
91	<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	N/A
41	N/A	N/A	N/A	N/A	N/A	N/A
73	N/A	N/A	N/A	N/A	N/A	N/A
83	N/A	N/A	N/A	N/A	N/A	N/A
36	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 22. Work Orders – Queue (Internal Users)

<b>FreddieMac</b>   Loan Coverage Advisor®									
Loan Coverage Advisor®   SEARCH   SAVED RESULTS   REPORTS   <b>WORK ORDERS</b>									
<b>Work Order Queue</b> <span>CREATE WORK ORDER</span>									
Field Category: Select   Select   Type here... Category Type: Select   Work Order Status: Select									
<span>FIND WORK ORDERS</span> <span>RESET</span>									
WORK ORDER ID	WORK ORDER NAME	WORK ORDER TYPE	LOAN COUNT	BIFURCATION TYPE	EFFECTIVE DATE	EXPIRATION DATE	STATUS SET DATE	LAST UPDATE ID	STATUS
1		Standard 30YR	100000	-	10/01/2025	-	-	-	-
2	Test MSU	Manual Sunset Update	4	-	10/24/2025	-	10/24/2025	-	Cancelled
2	Test MOU 3	Manual Obligor Update	2	-	10/24/2025	-	10/24/2025	-	Cancelled
2	Test MOU 2	Manual Obligor Update	2	-	10/24/2025	-	10/24/2025	-	Cancelled
2	Test MOU	Manual Obligor Update	2	-	10/24/2025	-	10/24/2025	-	Cancelled
2	Test MAU 2	Manual Alternative Payment Plan Update	4	-	10/24/2025	-	10/24/2025	-	Cancelled
2	Test MAU	Manual Alternative Payment Plan Update	4	-	10/01/2025	-	10/24/2025	-	Cancelled



## 23. Work Orders – Create Work Order (Internal Users)

The screenshot shows the 'Loan Coverage Advisor' interface with the 'WORK ORDERS' tab selected. A 'Create New Work Order' modal is open, featuring a 'Type' dropdown menu and 'PROCEED' and 'CANCEL' buttons. In the background, the 'Work Order Queue' section is visible, showing filters for 'Field Category' and 'Category Type', and a table with columns: WORK ORDER ID, WORK ORDER NAME, WORK ORDER TYPE, LOAN COUNT, OBLIGATION TYPE, EFFECTIVE DATE, EXPIRATION DATE, STATUS SET DATE, LAST UPDATE ID, and STATUS.

## 24. Work Orders – Manual Obligor Update (Internal Users)

The screenshot displays the 'New Work Order' form for a 'Manual Obligor Update'. The form includes fields for 'Work Order ID', 'Name', 'Effective Date of Settlement', and 'Reason for Manual Update'. Below these are sections for 'Import Submission' and 'Supporting Documents', each with file specifications and a 'Browse' button. The footer contains the Freddie Mac logo, 'Terms and Conditions', 'Privacy Policy', and '©2025 Freddie Mac'.

**File Specifications for Import Submission:**

- Allowed number of file(s): 1
- Maximum individual file size: 20 MB
- Allowed file format(s): XLS, XLSX
- Allowed file name format: Any Format
- Restricted file format(s): EXE

**File Specifications for Supporting Documents:**

- Allowed number of file(s): 7
- Maximum individual file size: 20 MB
- Allowed file format(s): All Formats
- Allowed file name format: File Name Cannot Exceed 100 Characters
- Restricted file format(s): EXE



25. Work Orders – Manual Alternative Payment Plan Update (Internal Users)

Loan Coverage Advisor®

SEARCHSAVED RESULTSREPORTSWORK ORDERS

← New Work Order

SAVE AS DRAFT

Work Order ID

Work Order TypeManual Sunset Update

Current Status

Name \*

Type here...

Effective Date of Settlement \* mm/dd/yyyy

mm/dd/yyyy

Reason for Manual Update \*

Type here...

250 Characters Remaining

Import Submission

Click [here](#) for Manual Update Template and Instruction file.

File Specifications \*

• Allowed number of file(s): 1

• Allowed file format(s): XLS, XLSX

• Restricted file format(s): EXE

• Maximum individual file size: 20 MB

• Allowed file name format: Any Format

Browse from your computer or drag and drop file(s) here

Supporting Documents

File Specifications

• Allowed number of file(s): 7

• Allowed file format(s): All Formats

• Restricted file format(s): EXE

• Maximum individual file size: 20 MB

• Allowed file name format: File Name Cannot Exceed 100 Characters

Browse from your computer or drag and drop file(s) here

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## 26. Work Orders – Manual Sunset Update (Internal Users)

**Loan Coverage Advisor** SEARCH SAVED RESULTS REPORTS WORK ORDERS

**New Work Order** SAVE AS DRAFT

Work Order ID: -- Work Order Type: Manual Sunset Update Current Status: --

**Name \***  
Type here... Effective Date of Settlement \* mm/dd/yyyy  
mm/dd/yyyy

**Reason for Manual Update \***  
Type here... 256 Characters Remaining

**Import Submission**  
Click [here](#) for Manual Update Template and Instruction file.

**File Specifications \***

- Allowed number of file(s): 1
- Maximum individual file size: 20 MB
- Allowed file format(s): XLS, XLSX
- Allowed file name format: Any Format
- Restricted file format(s): EXE

[Browse from your computer or drag and drop file\(s\) here](#)

**Supporting Documents**

**File Specifications \***

- Allowed number of file(s): 7
- Maximum individual file size: 20 MB
- Allowed file format(s): All Formats
- Allowed file name format: File Name Cannot Exceed 100 Characters
- Restricted file format(s): EXE

[Browse from your computer or drag and drop file\(s\) here](#)

## 27. Work Orders – Mortgage Insurance Settlement (Internal Users)

**Loan Coverage Advisor** SEARCH SAVED RESULTS REPORTS WORK ORDERS

**New Work Order** SAVE AS DRAFT

Work Order ID: -- Work Order Type: MI Settlement Current Status: --

**Define Terms**  
Select an MI Settlement Type to define the Settlement Terms

**MI Settlement Type \***  
☒ Lender with Freddie Mac (with RBAs)
 ☐ MI Company with Lender
 ☐ MI Company with Freddie Mac

**MI Settlement Name \***  
Type here...

**Effective Date of Settlement \***  
mm/dd/yyyy

**Associated RBA Settlements \***  
Type here...

**Courtesyparty Invoiced \***  
Type to Select...

**Courtesyparty Number \***  
--

**MI Stand-in-Retiree \***  
%

**MI Settlement Summary \***  
Type here... 256 Characters Remaining

**Import Submission**  
Click [here](#) for Manual Update Template and Instruction file.

**File Specifications \***

- Allowed number of file(s): 1
- Maximum individual file size: 20 MB
- Allowed file format(s): XLS, XLSX
- Allowed file name format: Any Format
- Restricted file format(s): EXE

[Browse from your computer or drag and drop file\(s\) here](#)

**Supporting Documents**

**File Specifications \***

- Allowed number of file(s): 7
- Maximum individual file size: 20 MB
- Allowed file format(s): All Formats
- Allowed file name format: File Name Cannot Exceed 100 Characters
- Restricted file format(s): EXE

[Browse from your computer or drag and drop file\(s\) here](#)





## 28. Work Orders – R&W Settlement (Internal Users)

**Loan Coverage Advisor** SEARCH SAVED RESULTS REPORTS WORK ORDERS

**New Work Order** SAVE AS DRAFT

Work Order ID:   
 Work Order Type: **R&W Settlement**   
 Current Status:   
 Define Terms

Settlement Type: **Selling Reps & Warrants**   
 Settlement Name:   
 Settlement EIS Number:   
 Effective Date of Settlement:   
 R&W Settlement Summary:   
 256 Characters Remaining

Carve-Out Types   
 Carve-Out Types:   
 ☐ Predatory Lending ☐ Charter Non-Compliance ☐ Fraud ☐ Other

R&W Updates   
 Selling R&W Sunset Date:   
 Exclusion Date:   
 Import Submission   
 Click [here](#) for Manual Update Template and Instruction file.   
 File Specifications:   
 • Allowed number of file(s): 1   
 • Maximum individual file size: 20 MB   
 • Allowed file format(s): XLS, XLSX   
 • Allowed file name format: Any Format   
 • Restricted file format(s): EXE   
 Supporting Documents   
 File Specifications:   
 • Allowed number of file(s): 7   
 • Maximum individual file size: 20 MB   
 • Allowed file format(s): All Formats   
 • Allowed file name format: File Name Cannot Exceed 100 Characters   
 • Restricted file format(s): EXE

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## 29. Work Orders - Bifurcation Delivery Setup (Internal Users)

**Loan Coverage Advisor** SEARCH SAVED RESULTS REPORTS WORK ORDERS

**Bifurcated Delivery Setup** SAVE AS DRAFT

Work Order ID:   
 Work Order Type: **Bifurcated Delivery Setup**   
 Current Status:   
 Define Terms

Name:   
 Co-Issue Type: **Standard Co-Issue Type**   
 BF Code:   
 ☐ Operational ☐ Full   
 Originator Number:   
 Seller Number:   
 Service/Aggregator Number:   
 MC Number:   
 Effective/Expiration Date Range (Selected 5 days):   
 Comments:   
 256 Characters Remaining



30. Work Orders – Transfer of Servicing (Internal Users)

Loan Coverage Advisor®

SEARCHSAVED RESULTSREPORTSWORK ORDERS

Transfer of Servicing Work Order

CANCEL

Work Order ID  
21193

Status  
Approved

Requested Loan Count  
1

Servicing Transfer Details

Received Date  
09/12/2025

Effective Date  
11/01/2025

Transferor  
989703

Legal Entity Name  
Rocket Mortgage, LLC

Legal Entity ID  
7197000003

Transferee  
226945

Legal Entity Name  
Lakeview Loan Servicing, LLC

Legal Entity ID  
3103300008

R&W Obligation Details for Work Order Transfer Cycle

CURRENT SELLING R/W RANK 1 ^	CURRENT SELLING R/W RANK 2	CURRENT SERVICING R/W	DELIVERY BIFURCATION	CURRENT SERVICING BIFURCATION	LOAN COUNT
142941		989703	Full	Full	1

1 - 1 of 1 items

10 | 25 | 50 | ALL

< > >>

R&W Transfer Details

Transaction Type  
Standard TOS

Transaction Name  
Rocket Mortgage, LLC To Lakeview Loan Servicing, LLC (989703 to 226945)

Transfer Description  
-

Supporting Documents

File Specifications

- Allowed number of file(s): 7
- Maximum individual file size: 20 MB

- Allowed file format(s): All Formats
- Allowed file name format: File Name Cannot Exceed 100 Characters

- Restricted file format(s): EXE

Browse from your computer or drag and drop file(s) here