Freddie Mac
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Servicing Transfer Manager

PUBLIC

October 2026 Release Notes

Servicing Transfer Manager is a tool available through Freddie Mac Gateway® that Servicers use to submit requests and facilitate a Subsequent Transfer of Servicing (STOS) or intra-Servicer portfolio move.

Overview

The October Servicing Transfer Manager release introduces enhancements that improve the accuracy, efficiency and overall user experience of the servicing transfer process. Key updates include:

- Clearer transfer validation messages
- A new check to confirm whether transferee Servicers are approved to service eMortgages (i.e., mortgage loans evidenced by eNotes)
- Removal of an outdated item from the Servicing Transfer Manager questionnaire
- A new, consolidated Summary Loan List report
- Format enhancements and new data fields are available for entire portfolio transfers in the Summary Loan List report
- Changes to streamlined status-based emails and notifications to improve stakeholder communication

Servicing Transfer Manager Edits

- We updated the existing "Data Unavailable" edit logic to provide a more accurate explanation for why loan transfers are rejected during the transfer process.
- We implemented a new edit validation to verify whether the receiving Servicer is approved to service eMortgages before allowing eMortgage transfers to proceed.

Updates to Servicing Transfer Manager Questionnaire

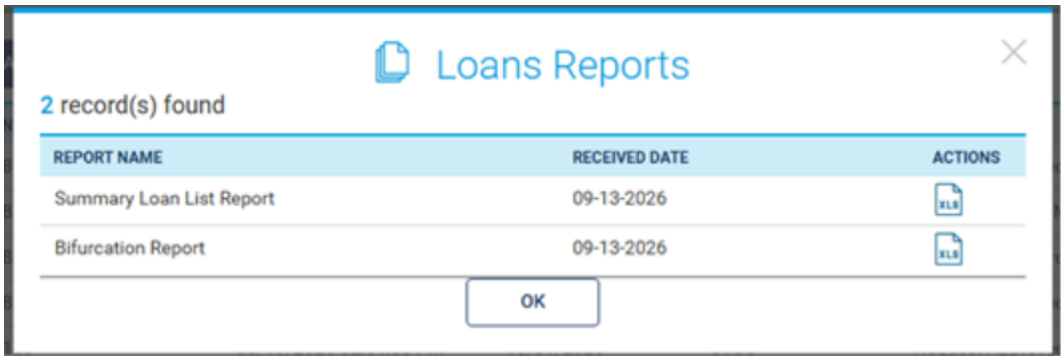
- We removed question #12 from the View Subsequent Transfer Servicing Request screen related to Freddie Mac HAMP electronic modification requirements as it is no longer applicable.



New Transfer Request Summary Report

We've created a new summary report that:

- Delivers both request-level summary and loan-level data in a single comprehensive report.
- Streamlines the review and sign-off process for greater efficiency.
- Utilizes a simplified, consolidated template that combines information previously spread across multiple worksheet tabs into one.

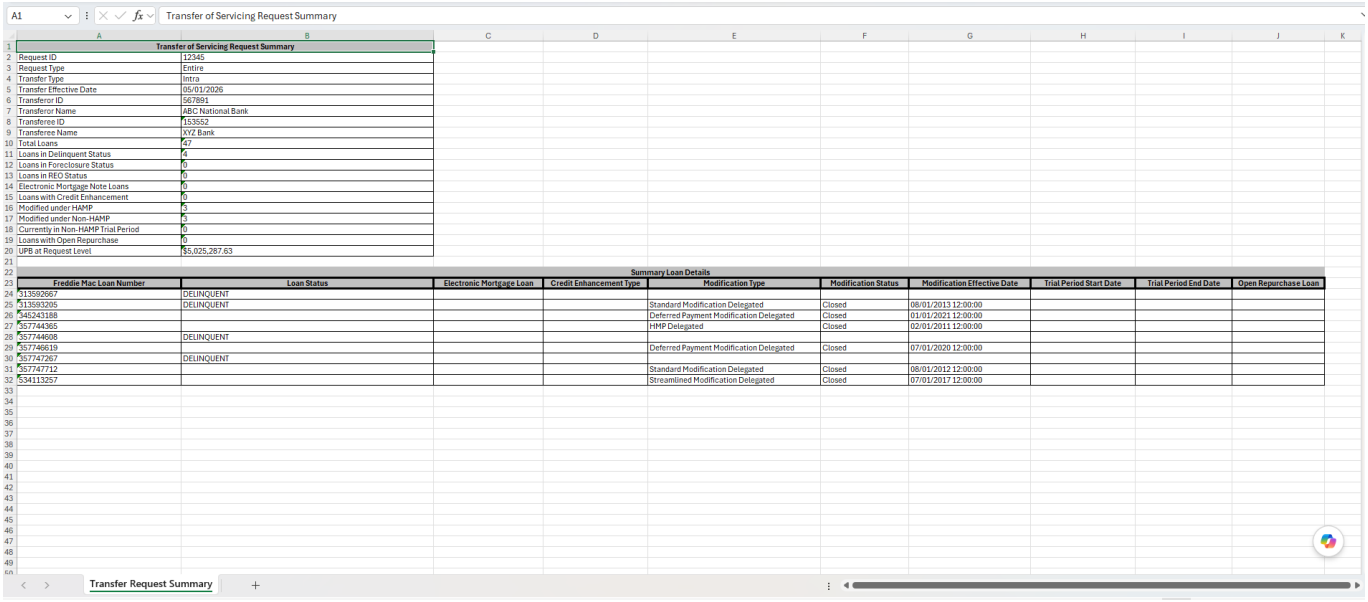


Notes:

- Information from the previous Loan List and Summary Detail reports has been consolidated into the Summary Loan List report**.**
- The information in the Bifurcation report will remain the same but will be presented in a new report template**.**
- All reports will be in .xls format only.

Enhanced Format for Entire Portfolio Summary Detailed Reports

We've redesigned the format of the Entire Portfolio Summary Detail Reports to improve readability, include new data fields and align with industry reporting standards.



Streamlined Status-based Email and Freddie Mac Gateway® Notifications

We've optimized and consolidated status-based notifications to reduce email volume, provide more clarity and ensure users and email recipients receive only relevant updates based on transfer status changes.

Related Resources

- Servicing Transfer Manager Online Help
- Servicing Transfer Management checklists that provide step-by-step guidance to obtain access to new portfolios for SCRs, interim servicing and subservicing.
- Freddie Mac Access Manager – Looking to obtain access to Servicing Transfer Manager? Start here.