

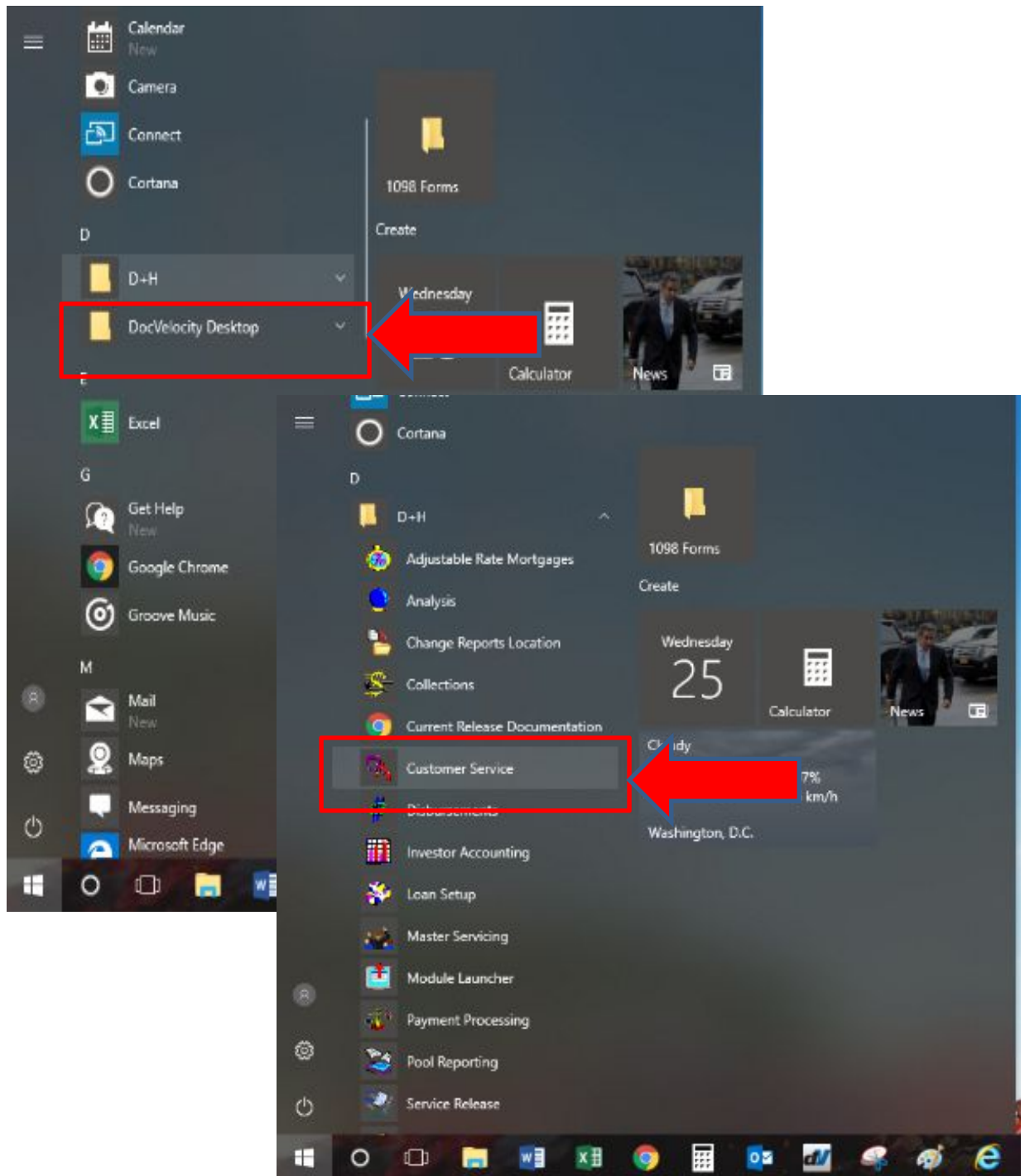


Customer Service Module

Servicing

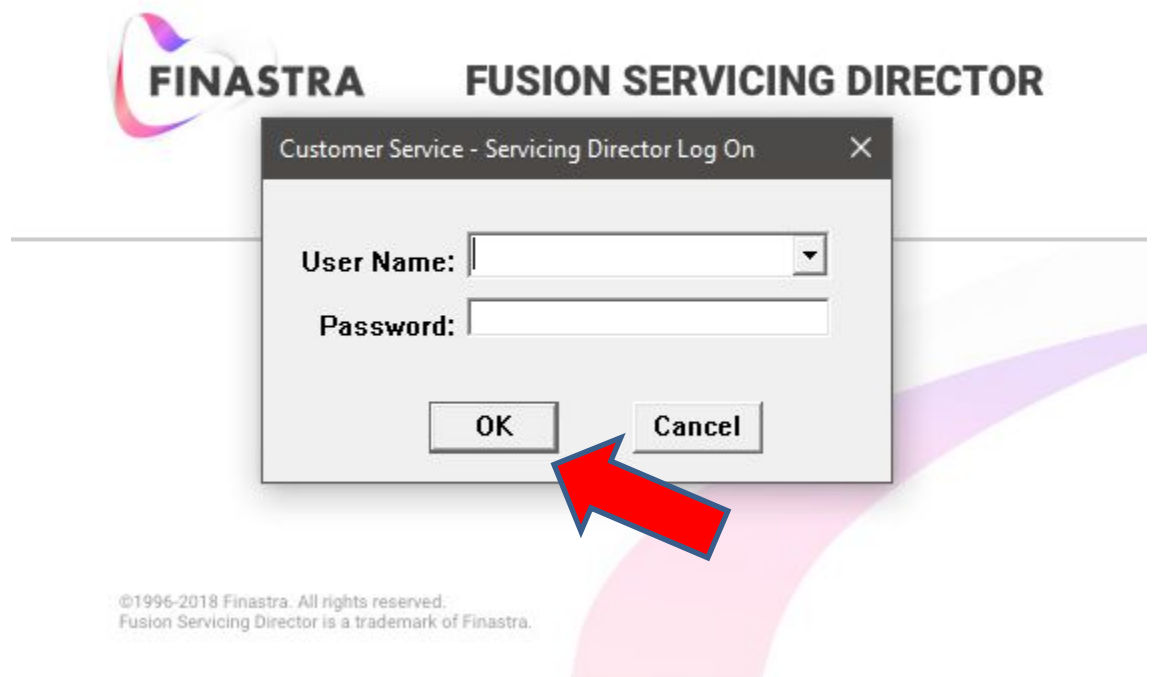


Customer Service Module



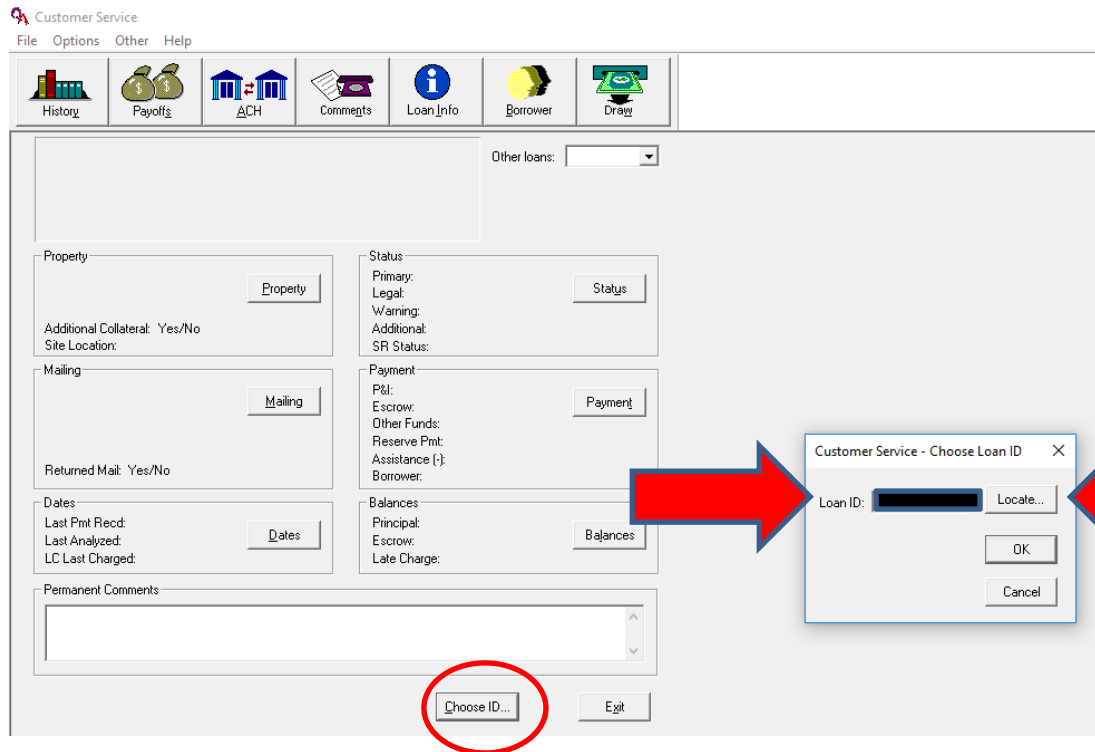
From your Desktop select D&H and then select Customer Service

Customer Service Module



When this screen appears you will Log In and select **OK**

Customer Service Module

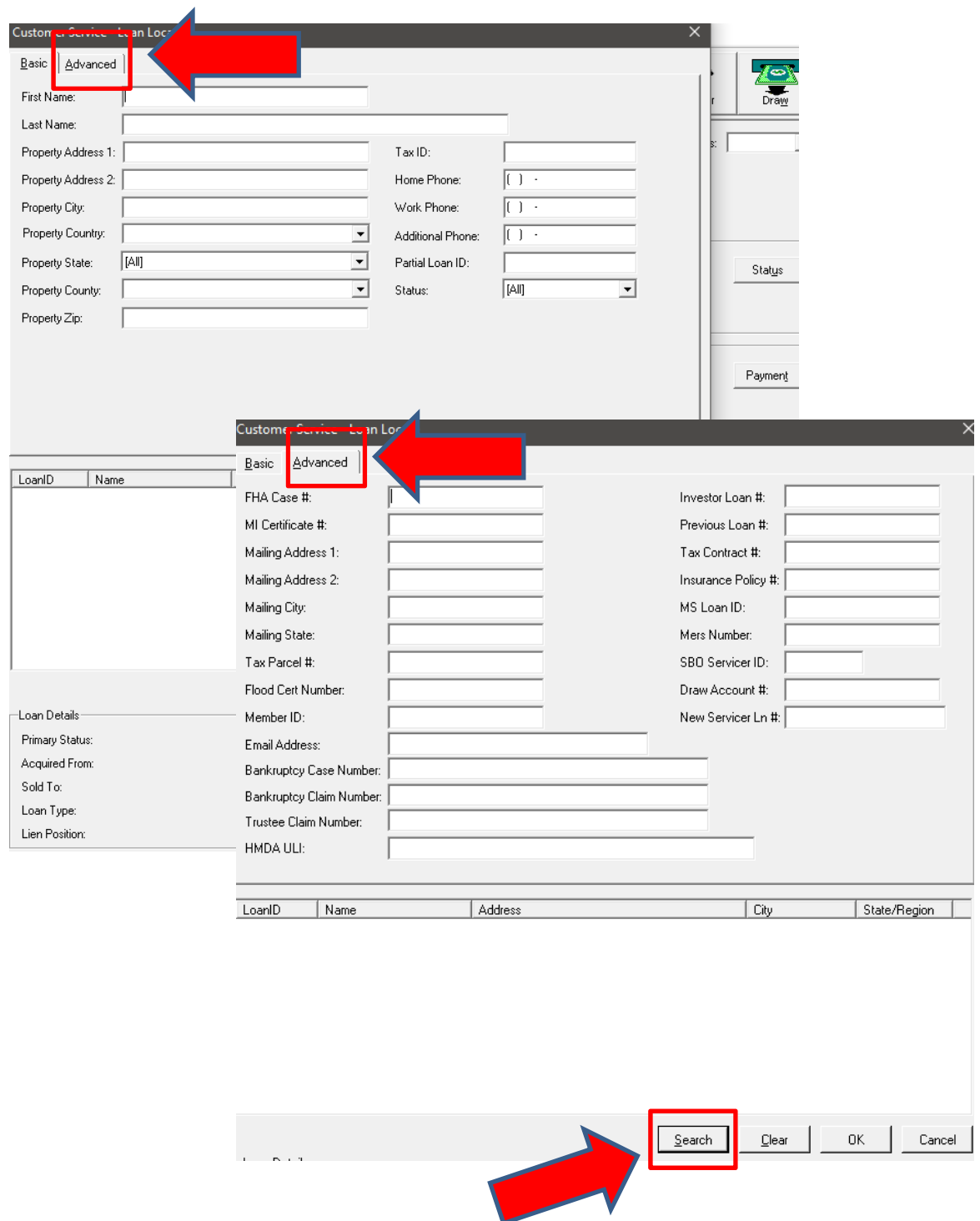


Select Choose ID and the pop up box will appear. Begin by typing in the loan number and clicking “OK”

If you do not have the loan number, choose Locate

Notes:

Customer Service Module



Customer Service - Loan Locator

Basic | **Advanced**

First Name:

Last Name:

Property Address 1:

Property Address 2:

Property City:

Property Country:

Property State:

Property County:

Property Zip:

Tax ID:

Home Phone:

Work Phone:

Additional Phone:

Partial Loan ID:

Status:

Draw

Status

Payment

Customer Service - Loan Locator

Basic | **Advanced**

FHA Case #:

MI Certificate #:

Mailing Address 1:

Mailing Address 2:

Mailing City:

Mailing State:

Tax Parcel #:

Flood Cert Number:

Member ID:

Email Address:

Bankruptcy Case Number:

Bankruptcy Claim Number:

Trustee Claim Number:

HMDA ULI:

Investor Loan #:

Previous Loan #:

Tax Contract #:

Insurance Policy #:

MS Loan ID:

Mers Number:

SBD Servicer ID:

Draw Account #:

New Servicer Ln #:

Loan Details

Primary Status:

Acquired From:

Sold To:

Loan Type:

Lien Position:

LoanID Name Address City State/Region

Search Clear OK Cancel

NOTE: You can enter any of these fields to locate the account.

You can also click Advance tab for additional ways to locate the borrower's information.

Customer Service Module

The screenshot displays the 'Customer Service' application window. The 'Borrower' tab is selected and highlighted with a red box. Below the main menu, a summary of loan details is shown, including the interest rate (6.87500%), collector (Default Collector), loan type (Conventional), SPOC, investor (CSC001-Citadel Servicing Corporation), due date (05/01/2018), currency (US Dollars), and AML type (N/A). The 'Customer Service - Borrower' sub-window is open, showing a table of borrower names with 'Primary' selected. To the right, a detailed form for the borrower is displayed, with several fields highlighted in red: 'Name' (First & Middle, Last), 'Details' (Type: Individual, Title, Sector), 'Phone Numbers and Other Information' (Primary, Primary Work, Ext., Additional Phone Numbers, Best Time to Call, Time Zone), 'E-Mail Address', 'Tax Type' (SSN), 'Tax ID #' (with a masked number and a 'Certified' checkbox), 'Foreign Citizen', 'Employee', 'W-8 Received', 'Business', 'Deceased', 'Birth Date' (11/08/1952), 'Language', and 'Responsibility' (None). At the bottom of the sub-window are buttons for 'New', 'Edit', 'Delete', 'Choose ID...', 'Tax ID', and 'Close'. A status bar at the very bottom indicates 'Right click menu available' and a 'NUM' button.

Customer Service

File Options Other Help

History Payoffs ACH Comments Loan Info **Borrower** Draw

Interest Rate: 6.87500% Due: 05/01/2018 Other loans: [redacted]
Collector: Default Collector Currency: US Dollars
Loan Type: Conventional AML Type: N/A
SPOC:
Investor: CSC001-Citadel Servicing Corporation

Customer Service - Borrower

Interest Rate: 6.87500% Loan ID: [redacted] Due: 05/01/2018

Borrower Names	Position
[redacted]	Primary

Name
First & Middle: [redacted]
Last: [redacted]

Details
Type: Individual Title:
Sector:

Phone Numbers and Other Information
Primary: [redacted]
Primary Work: Ext:
☒ Additional Phone Numbers
Best Time to Call: None Time Zone: Unknown
E-Mail Address: [redacted]
Tax Type: SSN
Tax ID #: XXX-XX-7152 ☐ Tax ID # Certified
☐ Foreign Citizen ☐ W-8 Received
☐ Employee ☐ Business
Birth Date: 11/08/1952 ☐ Deceased
Language:
Responsibility: None

New Edit Delete Choose ID... Tax ID Close

Right click menu available NUM

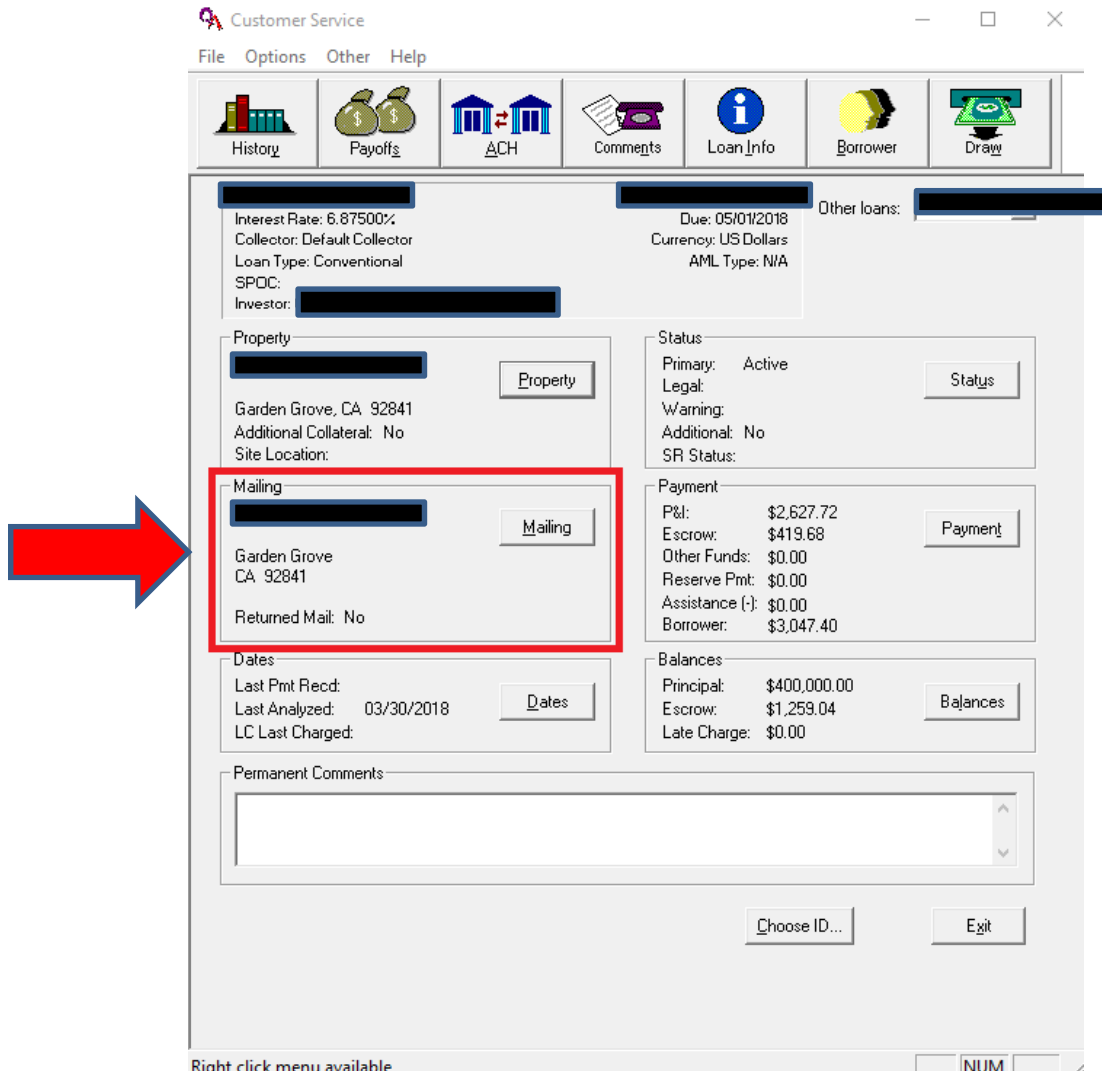
On this screen you will verify:

Borrower's and Co-borrower's (if applicable) information

- Full name(s)
- Phone number's
- Email

If any changes need to be made highlight the borrower on which changes need to be made, then click Edit, then click Ok when changes have been made.

Customer Service Module



Customer Service

File Options Other Help

History Payoffs ACH Comments Loan Info Borrower Draw

Interest Rate: 6.87500%
Collector: Default Collector
Loan Type: Conventional
SPDC:
Investor: [Redacted]

Due: 05/01/2018
Currency: US Dollars
AML Type: N/A

Other loans: [Redacted]

Property
[Redacted]
Garden Grove, CA 92841
Additional Collateral: No
Site Location:

Status
Primary: Active
Legal:
Warning:
Additional: No
SR Status:

Mailing
[Redacted]
Garden Grove
CA 92841
Returned Mail: No

Payment
P&I: \$2,627.72
Escrow: \$419.68
Other Funds: \$0.00
Reserve Pmt: \$0.00
Assistance (-): \$0.00
Borrower: \$3,047.40

Dates
Last Pmt Recd:
Last Analyzed: 03/30/2018
LC Last Charged:

Balances
Principal: \$400,000.00
Escrow: \$1,259.04
Late Charge: \$0.00

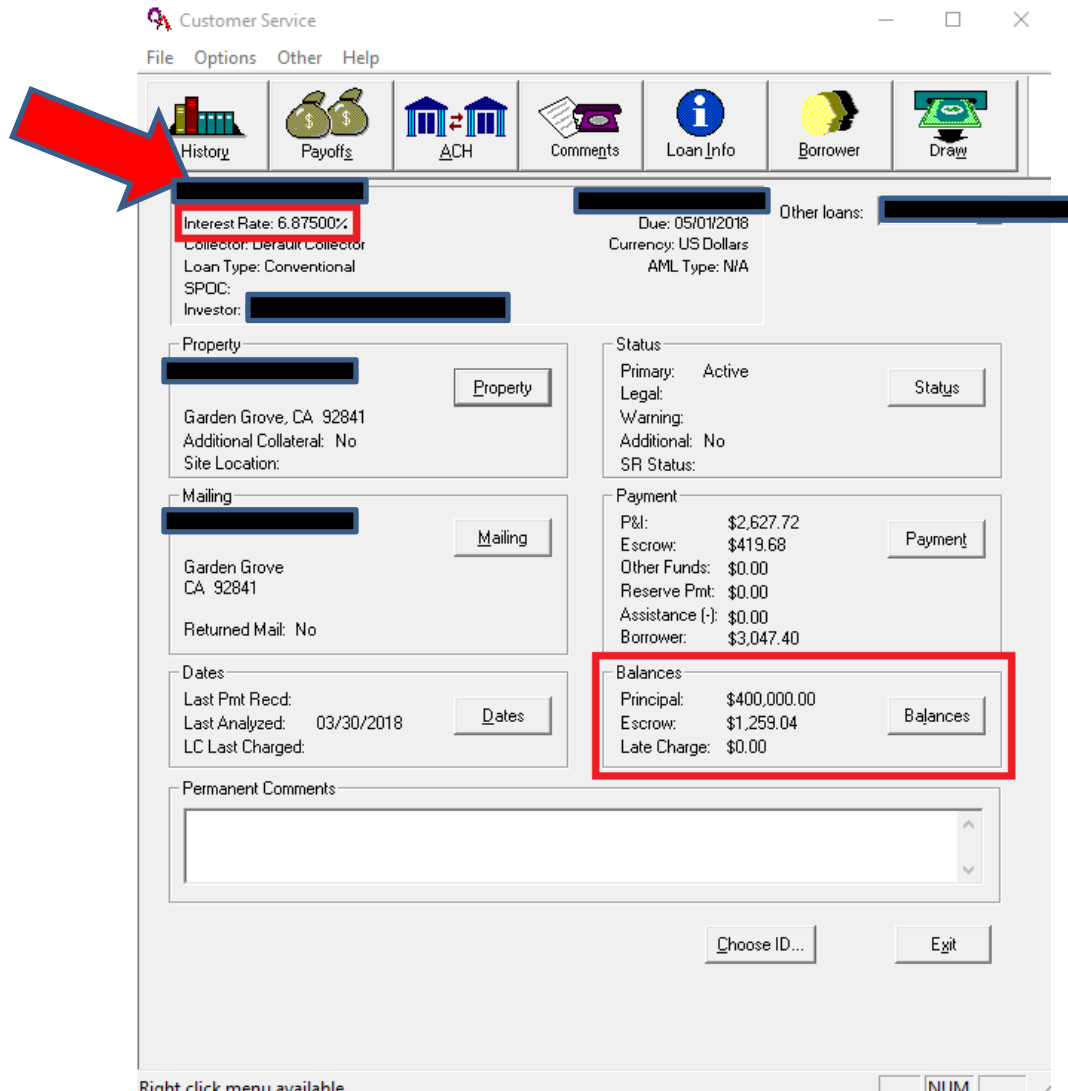
Permanent Comments
[Text Area]

Right click menu available

In this screen you will review and verify that the **Mailing Address** is correct. If the Mailing Address needs to be updated click Mailing, once change has been made, click, OK.

Notes:

Customer Service Module



Customer Service

File Options Other Help

History Payoffs ACH Comments Loan Info Borrower Draw

Interest Rate: 6.87500%
 Collector: Default Collector
 Loan Type: Conventional
 SPOC:
 Investor:

Due: 05/01/2018
 Currency: US Dollars
 AML Type: N/A

Other loans:

Property
 Garden Grove, CA 92841
 Additional Collateral: No
 Site Location:

Mailing
 Garden Grove
 CA 92841
 Returned Mail: No

Dates
 Last Pmt Recd:
 Last Analyzed: 03/30/2018
 LC Last Charged:

Status
 Primary: Active
 Legal:
 Warning:
 Additional: No
 SR Status:

Payment
 P&I: \$2,627.72
 Escrow: \$419.68
 Other Funds: \$0.00
 Reserve Pmt: \$0.00
 Assistance (-): \$0.00
 Borrower: \$3,047.40

Balances
 Principal: \$400,000.00
 Escrow: \$1,259.04
 Late Charge: \$0.00

Permanent Comments

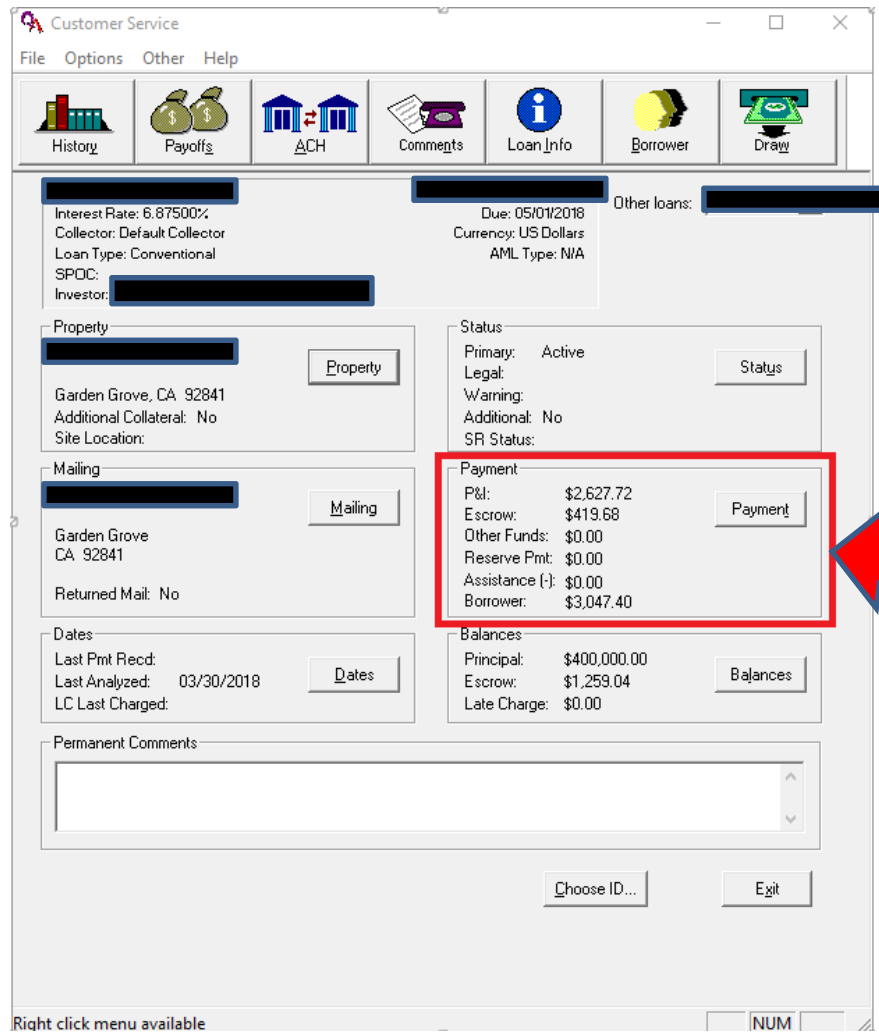
Choose ID... Exit

Right click menu available

On this screen it is important to verify the **Interest Rate** and **Principal Balance**.

Notes:

Customer Service Module



Customer Service

File Options Other Help

History Payoffs ACH Comments Loan Info Borrower Draw

Interest Rate: 6.87500% Due: 05/01/2018 Other loans: [REDACTED]
 Collector: Default Collector Currency: US Dollars
 Loan Type: Conventional AML Type: N/A
 SPOC: [REDACTED]
 Investor: [REDACTED]

Property: [REDACTED] Property
 Garden Grove, CA 92841
 Additional Collateral: No
 Site Location:

Mailing: [REDACTED] Mailing
 Garden Grove
 CA 92841
 Returned Mail: No

Dates: Last Pmt Recd: Last Analyzed: 03/30/2018 Dates
 LC Last Charged:

Status: Primary: Active Status
 Legal:
 Warning:
 Additional: No
 SR Status:

Payment: P&I: \$2,627.72 Payment
 Escrow: \$419.68
 Other Funds: \$0.00
 Reserve Pmt: \$0.00
 Assistance (-): \$0.00
 Borrower: \$3,047.40

Balances: Principal: \$400,000.00 Balances
 Escrow: \$1,259.04
 Late Charge: \$0.00

Permanent Comments

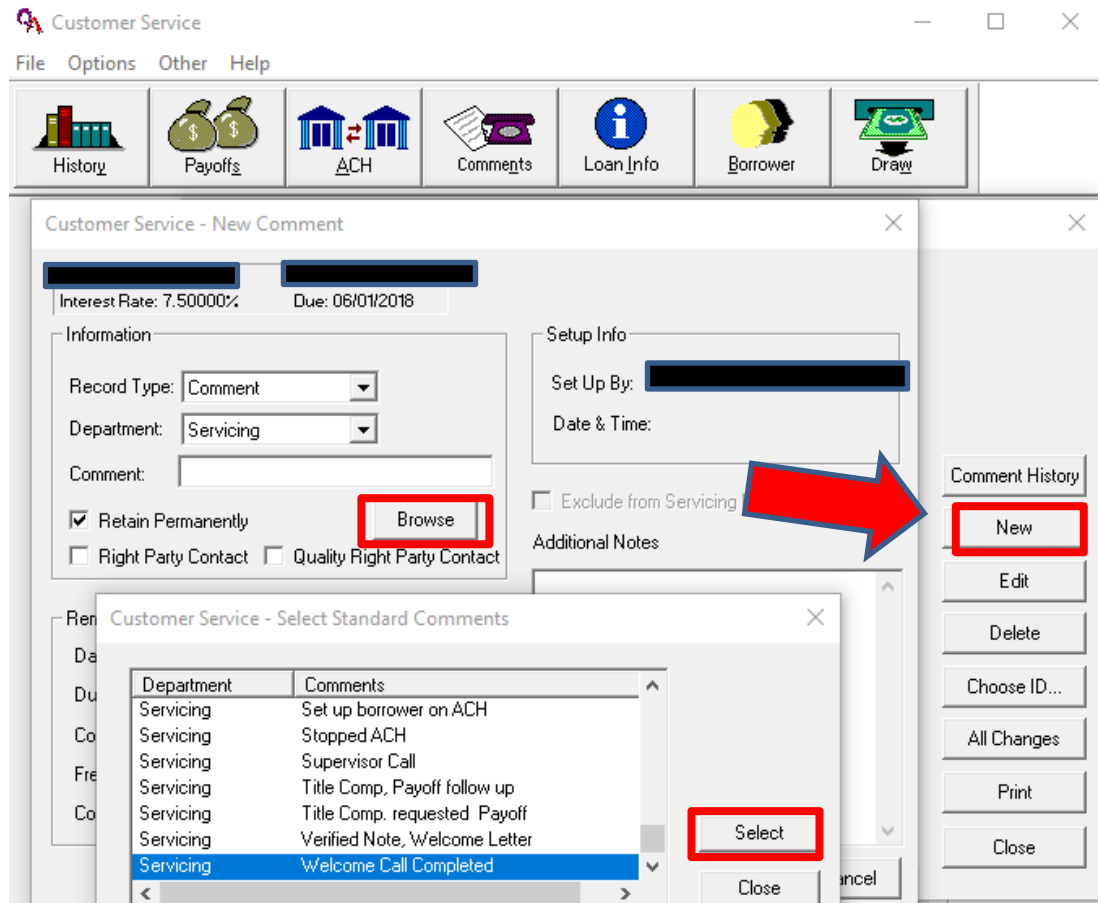
Choose ID... Exit

Right click menu available NUM

In this screen you will verify the **Full Payment Amount**

Also, break down the payment for the borrower stating what goes to **Principal** and **Interest (P&I) & Escrow**.

Customer Service Module



The screenshot shows the 'Customer Service - New Comment' window. A red box highlights the 'Browse' button in the 'Information' section. A red arrow points from this button to the 'New' button in the 'Comment History' panel on the right. Another red box highlights the 'Select' button in the 'Customer Service - Select Standard Comments' sub-window.

Customer Service - New Comment

Interest Rate: 7.50000% Due: 06/01/2018

Information

Record Type:

Department:

Comment:

☒ Retain Permanently ☐ Right Party Contact ☐ Quality Right Party Contact

Setup Info

Set Up By:

Date & Time:

☐ Exclude from Servicing

Additional Notes

Comment History

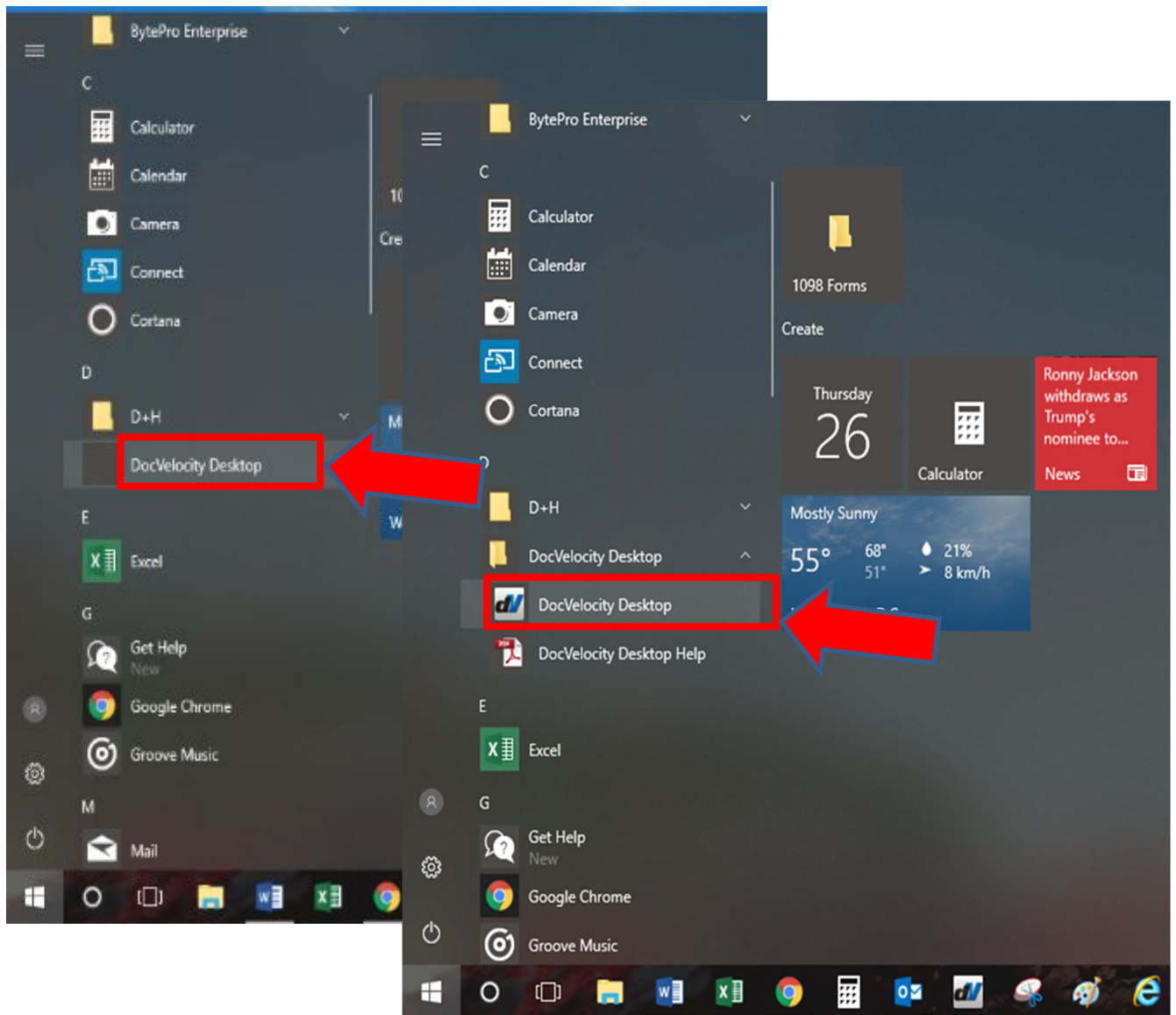
Customer Service - Select Standard Comments

Department	Comments
Servicing	Set up borrower on ACH
Servicing	Stopped ACH
Servicing	Supervisor Call
Servicing	Title Comp. Payoff follow up
Servicing	Title Comp. requested Payoff
Servicing	Verified Note, Welcome Letter
Servicing	Welcome Call Completed

In this screen you will **Notate the account**.

Notes are very important and need to be as detailed as possible, regarding the conversation with the borrower.

Customer Service Module



IMPORTANT: If no contact with the borrower on third attempt you will need to locate broker information in DocVelocity from the Start Menu

Customer Service Module



Site Address:

[Remove](#)

No description [Edit](#)

User ID:

Password: [Forgot password?](#)

☒ Remember Site Address & User ID

☒ Remember Password

☒ Log me in automatically when Desktop is launched

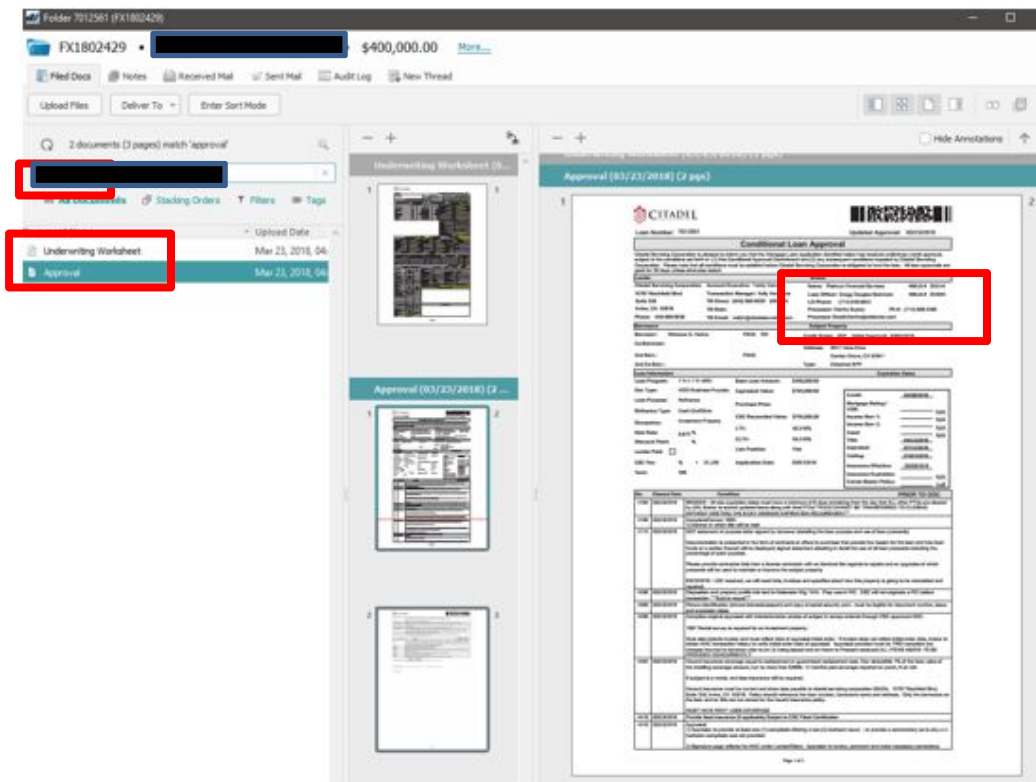
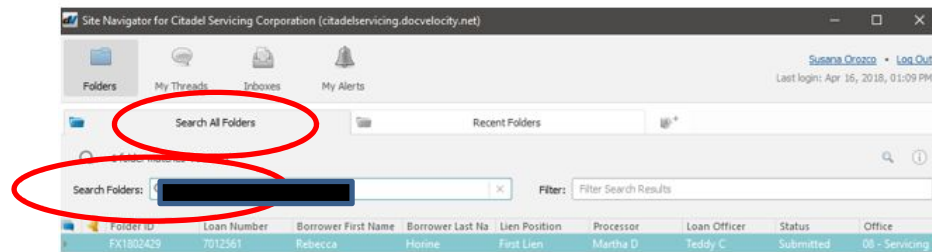
[Secure Sign In](#)

[Proxy Settings](#)

Log into DocVelocity.



Customer Service Module



- Click search all folders
- Type loan number
- Search approval
- Notate broker information in D+H