

Internship Overview

Tuesday, July 30th

— Danielle Wanke

Overview:

1. What is the Change Governance Office?
2. Daily Life of a Tech Writing Intern
3. Working with Archer
4. Process Maps
5. Final Thoughts/Questions



What is the Change Governance Office?

What is the Change Governance Office?

The Change Governance Office is part of the Risk and Compliance organization. It is responsible for all tasks related to writing, publishing, and governing Policies, Standards, and Procedures.

What we do:

- Provide governance of enterprise-wide P&P process and ensure the documents are standardized using the official Company P&P Style Guides
- Setup approval flow for P&Ps
- Coordinate all requests for P&P external releases
- Provide periodic reporting on status of P&P maintenance and approval
- Store all P&Ps in Nationstar's eGRC system (Archer)



Why do P&Ps matter?

The 1st thing you are probably asking...

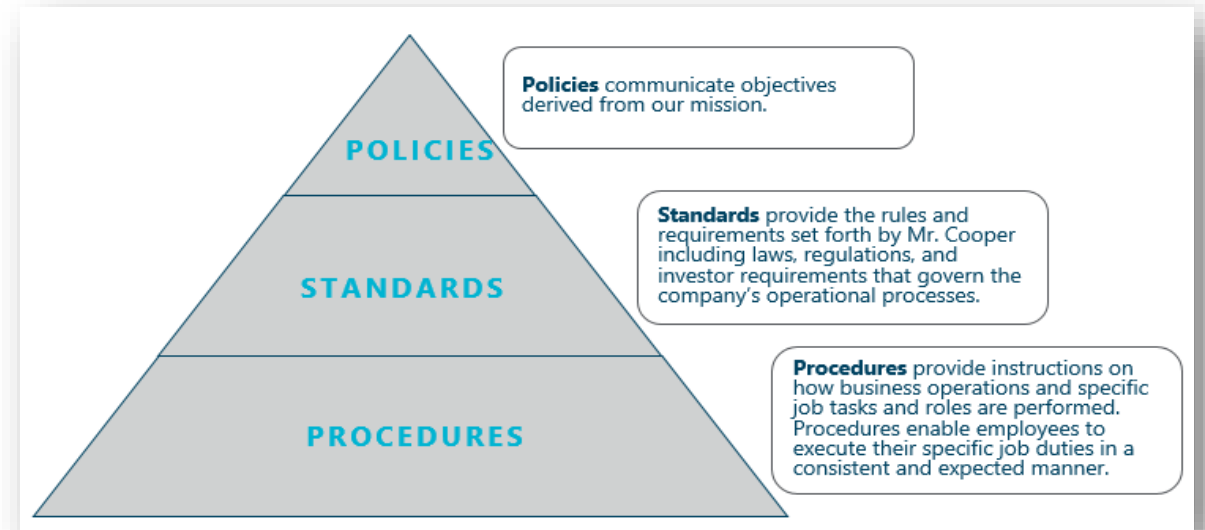
What are Policies, Standards, and Procedures??

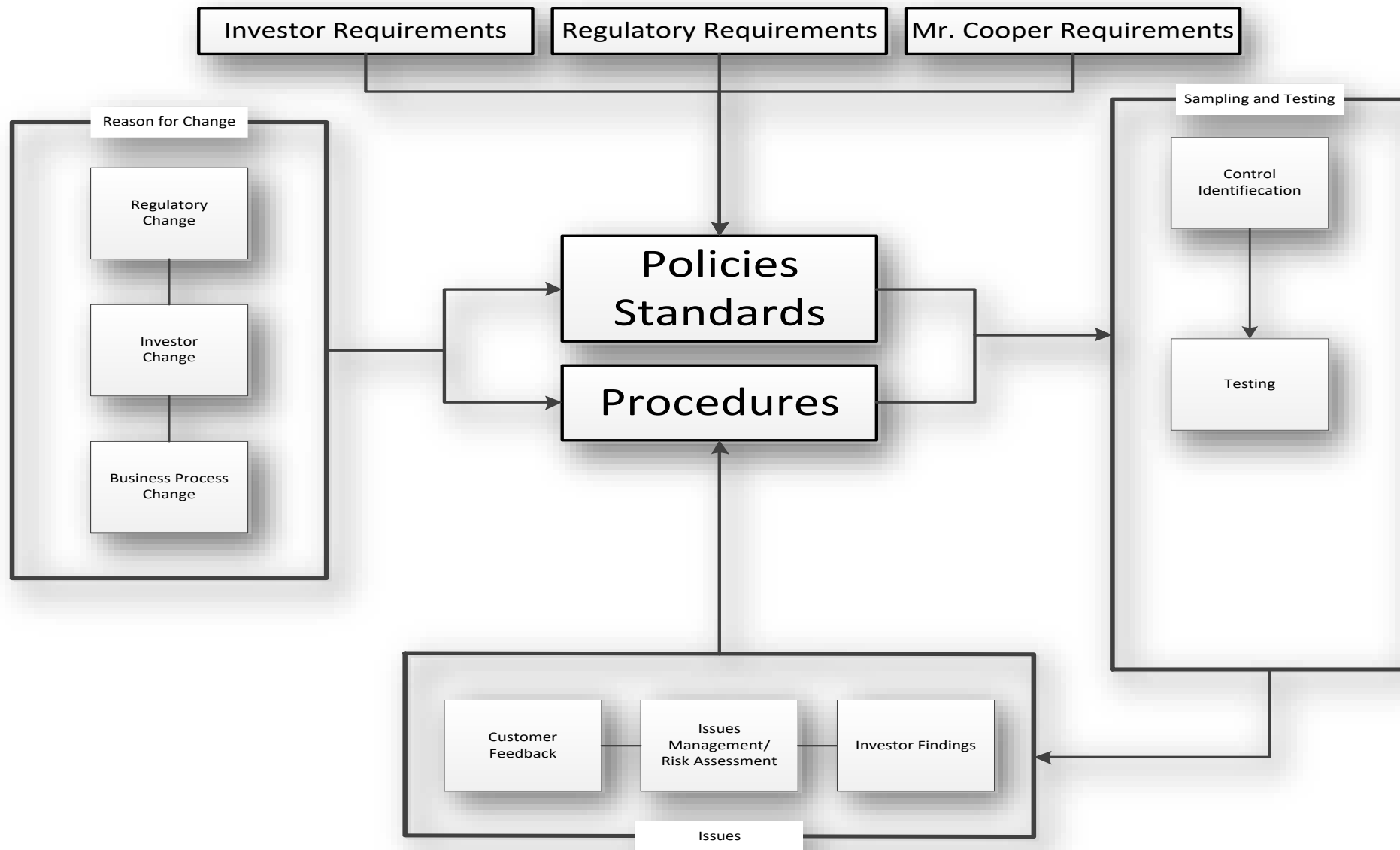
Policies, Standards, and Procedures are the 3 document types, collectively known as “**P&Ps**”.

The 2nd thing you are probably asking...

What is the point of having P&Ps?

- Prove compliance to 3rd parties such as regulators, Investors, and potential new business clients
- FLOD, QC and Internal Audit testing
- New hire training and support normal training processes
- Ensure customers receive the best possible experience with Mr. Cooper
- Ensure critical control activities are completed
- Required during some litigations
- Support business continuity planning
- Provide historical snapshots of Mr. Cooper’s past





Daily Life of a Technical Writing Intern

Daily Life of a Tech Writing Intern

Technical Writer

- Create/update P&Ps for change of law/Investor, business process change and annual reviews and gather approvals via Archer (Servicing & Corporate)
- Support high priority P&Ps in response to Exam Management and RFP Due Diligence
- Handle all projects related to P&Ps
- Interact with SMEs (Subject Matter Experts) to update documents
- Create and process PCRs (Policy Change Requests) through our SharePoint site/Archer
Examples: Policy Framework Implementation

P&P Support

- Create/update process maps
- Create tier 1 maps
- Assist with Process Map & Policy Framework Implementation
- Obtain approval from Process Map owners
- Quality Control



Working in Archer

Working in Archer

Training in Archer was about 3 weeks long and encompassed so many different aspects of document management. A few of the things I can now do in Archer:

- Retire and create new documents
- Create and cancel PCRs
- Manipulate HTML
- Follow the Style Guide

HTML + Archer

Receive the USAA Subservicer bank statements and save as [Seller/Service Number].

2. Run the Daily Payoff Report and prepare a text file:

Note: The FRS Database is run by one (1) individual from the IR FHLMC Team in order to create text files for all SSIDs.

1. Open the FRS database at L:\InvestorReporting\FHLMCFR\FHLMC accdb.
Click **Daily Reporting**. The FHLMC Reporting Control screen
Click **Run Prior Day Reporting**. The Daily Dashboard
Click **Run Prior Day Reporting**. The Date Selector screen
5. Enter the prior day's date in the Start Date and End Date fields.

Note: When the FRS is run on Monday, the Start Date is the previous Friday's date and the End Date is the previous Sunday's date.

Example: For Monday 10/02/2017 the Start Date is 09/29/2017 and the End Date is 10/01/2017

Click **Continue**. The system message, **Do you want to Run Prior Day Reporting**

displays.

Click **Yes**. The system message, **Data for [MM/DD/YYYY] has been Loaded**

2. Follow the steps below to clear the edits received from Freddie Mac for each SSID:
 3. Click **Work Edits** at the bottom of the Daily Dashboard The Set User Context window
 4. Select the Service No from the Servicer No drop-down list and click **Continue**. The
 5. Review the loan with

Note: Edits are Hard Rejects or Soft Rejects from Freddie Mac . Freddie is expecting some other value in

4. Make the necessary required changes and enter the appropriate comments in the
5. Click **Calculate** at the bottom of the Reporting Details section to recalculate the
Click **OK**:

- o If no action is required and the edits are not required to be submitted to Freddie Mac, take the following

1. Enter the appropriate comments in the Comments
2. Click **Pending** at the bottom of the Reporting Details The system

Note: A Pending loan is not populated in the Text file to be uploaded.

3. Click **OK** and repeat steps 1-6 to process the next edit or error.



```
468.         <li
469.         style="margin: 0in 14.75pt 0.0001pt 115pt; text-align: justify;"><span
470.         style="letter-spacing: -0.05pt;">Click</span> <strong>Calculate
471.         </strong><span style="letter-spacing: -0.05pt;">at</span>
472.         <span style="letter-spacing: -0.05pt;">the</span>
473.         <span style="letter-spacing: -0.05pt;">bottom of</span>
474.         the <span style="letter-spacing: -0.05pt;">Reporting</span>
475.         Details section to <span style="letter-spacing: -0.05pt;">recalculate
476.         </span>the data<span style="letter-spacing: -0.05pt;">
477.         after</span> <span style="letter-spacing: -0.05pt;">the</span>
478.         <span style="letter-spacing: -0.05pt;">changes</span>
479.         <span style="letter-spacing: -0.05pt;">have</span>
480.         <span style="letter-spacing: -0.05pt;">been</span>
481.         <span style="letter-spacing: -0.05pt;">made</span>
482.         <span style="letter-spacing: -0.05pt;">to</span>
483.         <span style="letter-spacing: -0.05pt;">Interest/UPB/Date/BIC.</span>
484.         The <span style="letter-spacing: -0.05pt;">system</span>
485.         <span style="letter-spacing: -0.05pt;">message</span>
486.         <strong><span style="letter-spacing: -0.05pt;">Calculation</span>
487.         <span style="letter-spacing: -0.05pt;">Updated</span>
488.         </strong><span style="letter-spacing: -0.05pt;">displays</span>
489.         <span style="letter-spacing: -0.05pt;">when</span>
490.         <span style="letter-spacing: -0.05pt;">the</span>
491.         <span style="letter-spacing: -0.05pt;">recalculation</span>
492.     has</li>
493.     <li style="margin-left: 115pt; text-indent: -0.25in;"><span
494.     style="font-size: 12pt; font-family: 'Arial', sans-serif; letter-spacing: -0.05pt;">Click</span><span
495.     style="font-size: 12pt; font-family: 'Arial', sans-serif;"> <strong>OK:</strong></span></li>
496.     </ol>
497. </ol>
498. </ol>
499. </ol>
500. <p style="margin: 0.2pt 24.15pt 0.0001pt 151pt; line-height: 13.8pt;"><span
501. style="font-size: 10pt; font-family: 'Courier New'">o </span>If
502. no <span style="letter-spacing: -0.05pt;">action</span>
503. is <span style="letter-spacing: -0.05pt;">required</span>
504. and the edits are not <span style="letter-spacing: -0.05pt;">required</span>
505. to be <span style="letter-spacing: -0.05pt;">submitted</span>
506. to <span style="letter-spacing: -0.05pt;">Freddie</span>
507. <span style="letter-spacing: -0.05pt;">Mac, take</span>
508. <span style="letter-spacing: -0.05pt;">the</span> <span style="letter-spacing: -0.05pt;">
509. style="letter-spacing: -0.05pt;">following </span>action:</p>
510. <ol>
511. <ol>
512. <ol>
513. <ol>
514. <li style="margin-left: 187.05pt; line-height: 13.6pt;">Enter
515. <span style="letter-spacing: -0.05pt;">the</span>
516. <span style="letter-spacing: -0.05pt;">appropriate
517. comments</span> in the <span style="letter-spacing: -0.05pt;">Comments</span></li>
518. <li style="margin: 0in 17.55pt 0.0001pt 187.05pt;"><span
```

The Finished Product:

Procedure

TRACKING ID

EFFECTIVE DATE

05/13/2019

PUBLISHED DATE

05/13/2019

VERSION NUMBER

1

DOCUMENT NAME

Service Release Assignment Inquiry Email Box Procedures

INTRODUCTION

These Procedures outline the steps a [REDACTED] Assignment Team Member takes to review and respond to requests received in the [REDACTED] inbox when the email is related to Assignments that are needed due to service release.

DEFINITIONS

AOM — Assignment of Mortgage

FileNet — Document Imaging System

TABFusion — File and Document Tracking Software

RMS — Resolution Management System

DESCRIPTION

Service Release Assignment Inquiry Email Box Procedures

An Assignment Team Member will complete the following steps:

1. Access the [REDACTED] [inbox](#).

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PAGE 1

2. Sort the emails by subject line to locate all related emails.
3. Open the first received email and look for [REDACTED] or other identifying information
4. Review related emails for additional information.
 - o If the property address pulls up in LSAMS, the loan has a [REDACTED] loan number, and is Active in MERS Online:
 - a. Place the email in the Onshore Review subfolder.
 - o If the property address pulls up in LSAMS, the loan has a [REDACTED] loan number, and is Active in MERS Online:
 - a. Review the daily Deal Tracking Report at [REDACTED]
 - If the loan is on the report, do not reply. Move the email to the Onshore Review subfolder.
 - o If the loan does not have a [REDACTED] loan number, search for the property in LSAMS.
 - If the address does not pull up in LSAMS, respond to the sender with the following statement: **We are unable to identify this property in our servicing system. It appears we never serviced this loan. Unfortunately, we cannot assist with this request. If your request involves a trust collapse, please contact [REDACTED]**
 - a. Move the email to the Pending-[YYYY]/[Month] subfolder.
 - o If the loan does not have a [REDACTED] loan number, move the email to the Onshore Review subfolder.
 - o If the loan has Centex as the Assignor, do not respond to the email and move the email to the Onshore Review subfolder.

Reviewing TAB Assignment Request Status

1. Navigate to TABFusion RMS.
2. Search for the loan by using the following pathway in TABFusion RMS:
Workflows>Assignment Requests>All Assignment Requests>Enter Loan Number
3. Click **OK**.
 - o If there is an Assignment Exception in TABFusion and the status is not Completed or Canceled:
 - a. Respond to the email with the following message: **We are currently working on the assignment chain. Please allow an additional 30 to 45 days for completion.**
 - b. Move the email and any related emails to the Pending-[YYYY]/[Month] subfolder.
 - o If there is an Assignment Exception in TABFusion and the status is Completed or Canceled, review FileNet or county records for a recorded copy of the requested Assignment.
 - If the requested Assignment is found, respond to the email and provide a copy of the Assignment.
 - a. Move the email and any related emails to the Pending-[YYYY]/[Month] subfolder.

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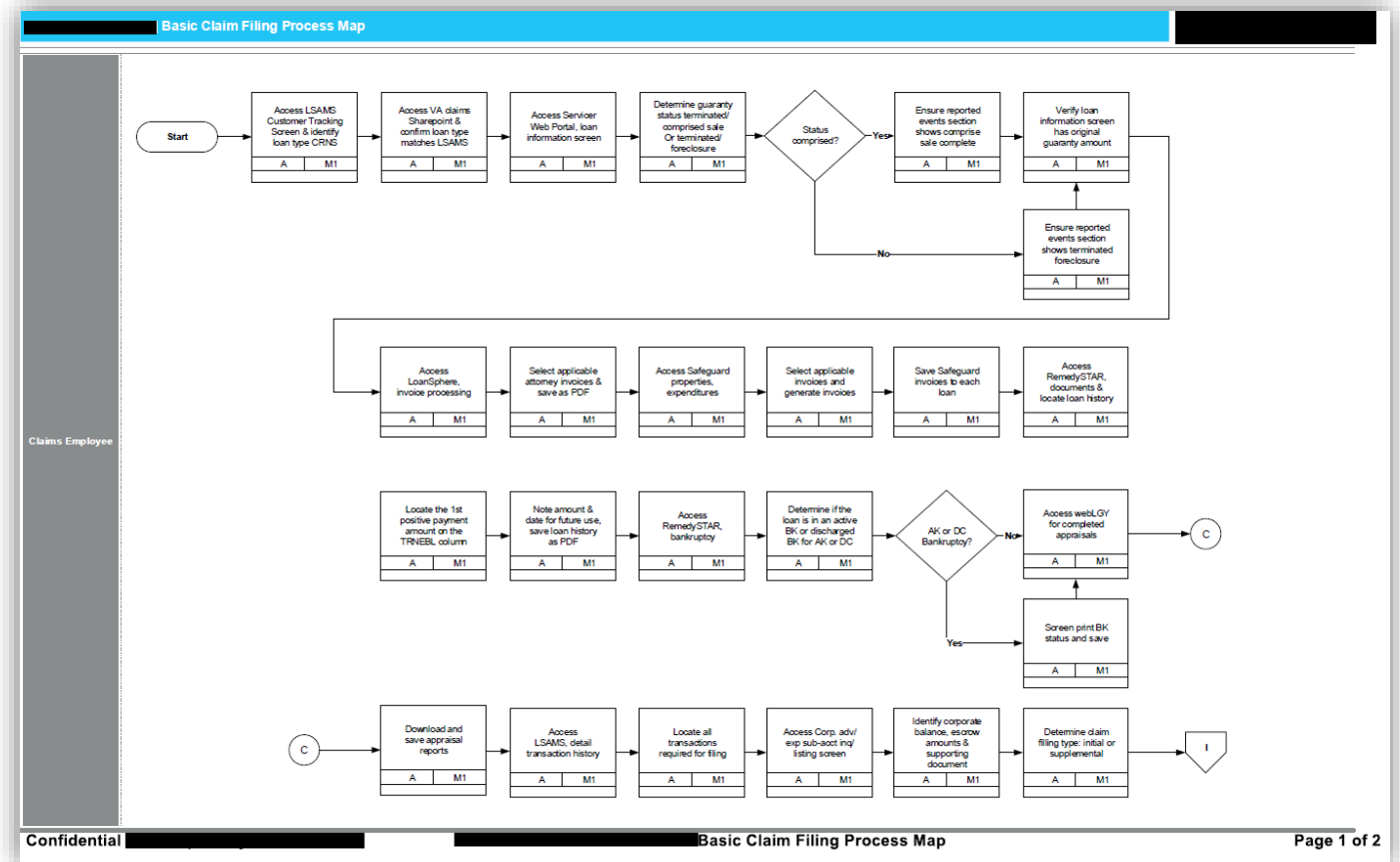
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Process Maps

Process Maps

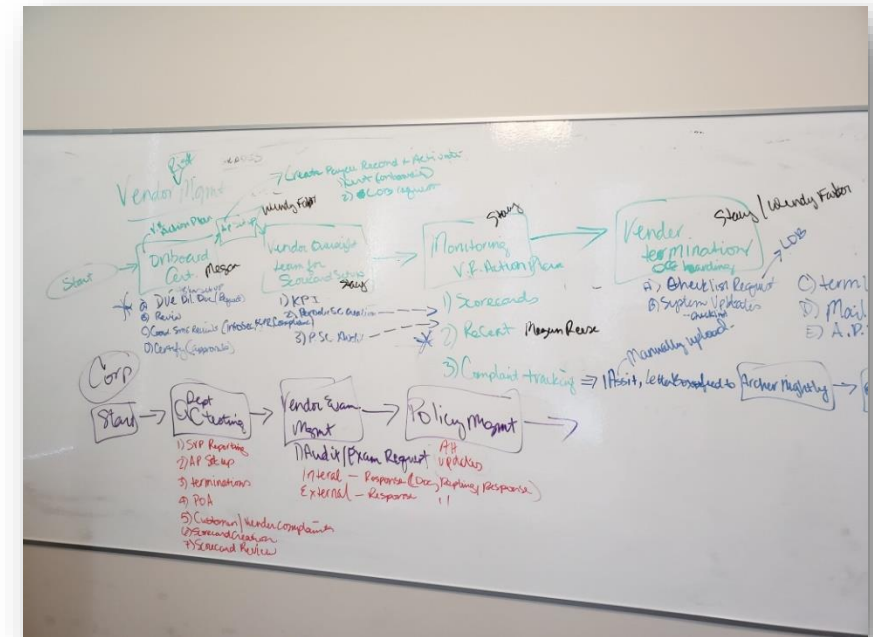
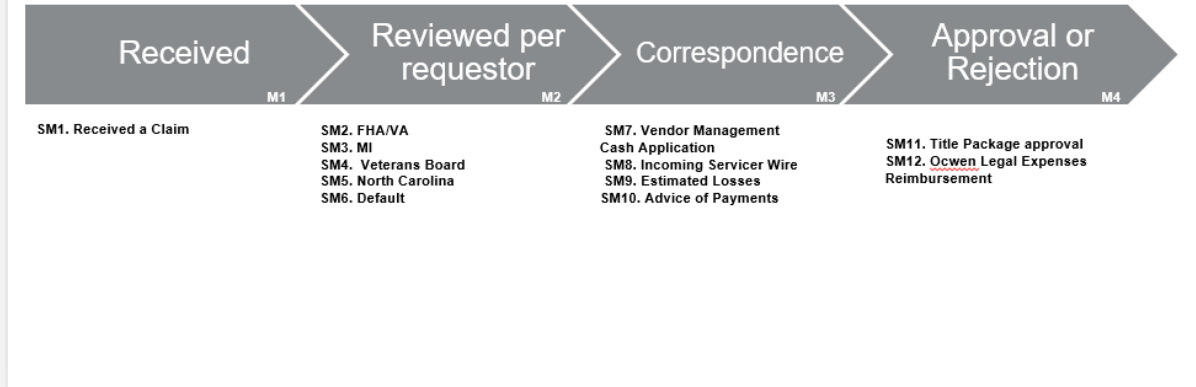
- Essential to our Framework project
- Help track and identify break points
- Identify processes that can be automated
- Provide a holistic view of a process



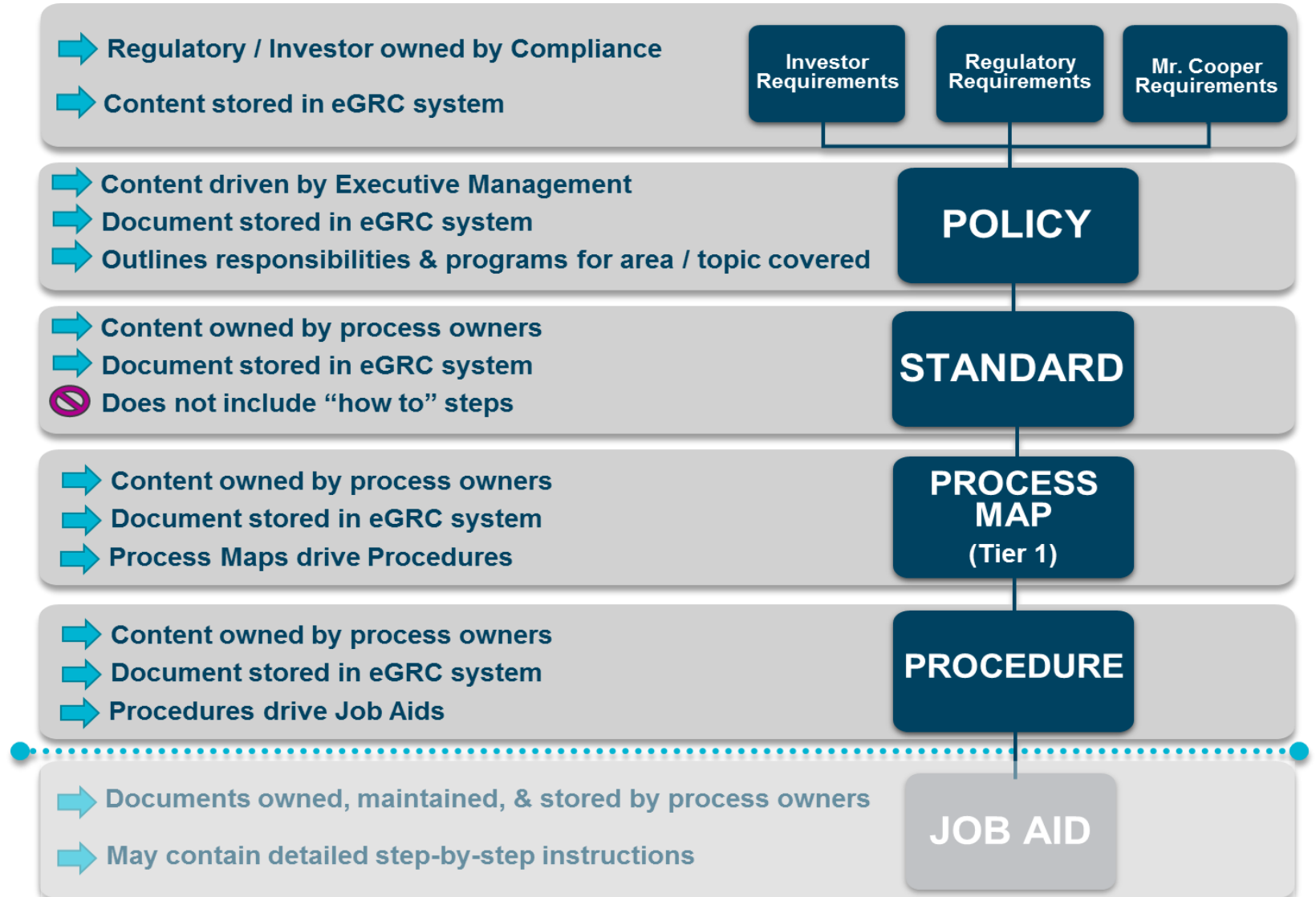
Process Maps cont.

To date I have:

- Transferred 51 process maps into VISIO
- Helped with the Mediations Framework map
- Created Tier one maps
- Transferred 'White Board' maps into VISIO
- Quality Checked 30 maps before Archer upload



Change Governance Office Framework

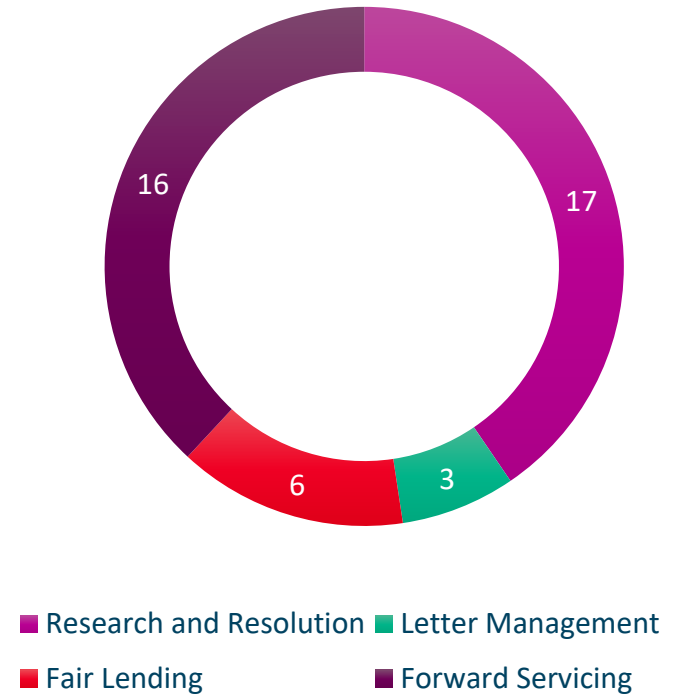


Final Thoughts

My Impact:

- Completed 24 Urgent Documents and have completed many more BAU documents
- I interacted most with our Research and Resolution Department 17 documents)
- Helped Complete the Mediations Framework Process Map

Documents by Responsible Departments



Questions?