

**Application for Approved LMP Portal Provider Status**  
United States Bankruptcy Court for the Western District of Pennsylvania

**VENDOR INFORMATION:**

Company Name	
Contact Name:	
Address:	
Contact Phone:	
Contact Fax:	
Contact Email:	

1. Has the Vendor provided any portal services to other bankruptcy courts?

Yes       No

If yes, please list the courts and describe services:

**SYSTEMS INFORMATION:**

1. Is there a secure website dedicated exclusively to portal services?

Yes       No

Please describe security:

2. Is there a privacy policy in place for the portal that meets or exceeds the standards applicable to financial institutions?

Yes       No

Please describe privacy policy:

a. Is any information disclosed to non-authorized third parties?

Yes       No

If yes, please describe such disclosures and parties:

3. Is data submitted through the portal stored for at least seven years?

Yes       No

If no, please explain:

4. Costs and fees:

a. Are there any setup fees to use the portal?

Yes       No

If yes, please describe the setup fees charged:

b. Are there any license fees to use the portal?

Yes       No

If yes, please describe the license fees charged:

c. Are there any usage fees to use the portal?

Yes       No

If yes, please describe the usage fees charged:

d. Are there any other fees of any kind to use the portal?

Yes       No

If yes, please describe the fees charged:

5. Users:

a. Will the Bankruptcy Court (and/or any of its designated agents such as Trustees) have access to review accounts submitted through the portal?

Yes       No

If yes, please describe how Court may access accounts:

b. Will debtors be able to submit their own accounts directly to the creditor through the portal?

Yes       No

If yes, please describe how this is accomplished:

c. Will creditors' counsel be able to access accounts submitted to their clients?

Yes       No

If yes, please describe including how creditors' counsel would be connected to an account:

6. Support and Training:

a. Do you provide a written manual describing how to use the portal?

Yes       No

If yes, please describe:

b. Do you provide on-site training sessions?

Yes       No

If yes, please describe such sessions and how on-site training sessions are scheduled:

c. Do you provide online training sessions?

Yes       No

If yes, please describe how online training sessions are scheduled:

d. Do you provide training videos?

Yes       No

If yes, please describe how training videos may be accessed:

e. Do you provide email support?

Yes       No

If yes, please describe:

f. Do you provide telephone support?

Yes       No

If yes, please provide number and hours of operation:

g. Is there any cost to any party associated with the technical support?

Yes       No

If yes, please identify the costs and parties responsible for such costs:

7. Portal Functionality:

- a. Can creditors provide their customized forms and loss mitigation requirements through the portal?

Yes       No

If yes, please describe how this is accomplished:

- b. Does the portal assist the debtor in determining which forms and documents to provide?

Yes       No

If yes, please describe how this is accomplished:

- c. Does the portal provide for email notifications to parties?

Yes       No

If yes, please describe when, how and to whom email notifications are sent:

- d. Does the portal time/date stamp all activity?

Yes       No

If yes, please describe:

e. Does the portal provide status updates?

Yes       No

If yes, please describe how account statuses are reported:

f. Can a detailed record of all activity on an account be printed?

Yes       No

If yes, please describe how this is accomplished:

g. Does the portal identify which user performed an action?

Yes       No

If yes, please describe this process:

h. Does the portal enable documents to be updated and are previously submitted documents retained?

Yes       No

If yes, please describe how documents are updated and past documents stored and displayed:

i. Does the portal index all submitted documents?

Yes       No

If yes, please describe:

j. Can a creditor bulk download the documents submitted through the portal or otherwise transfer documents submitted through the portal into its internal system?

Yes       No

If yes, please describe:

k. Is the portal consistent with the rules and procedures of the United States Bankruptcy Court for the Western District of Pennsylvania, including, but not limited to, the United States Bankruptcy Code, the Federal Rules of Bankruptcy Procedure, General Orders of the Court, and local rules such as W.PA.LBR 9020-1 through 9020-7?

Yes       No

Provide details:



l. Does the portal permit ongoing communication between debtor and creditor?

Yes       No

If yes, please describe:

m. Can debtor and creditor identify single points of contact through the portal?

Yes       No

If yes, please describe:

n. Are customized reports available to the creditors, debtors and Court?

Yes       No

If yes, please describe the types of reports available and how accessed:

8. Document Preparation Software:

a. Do you own or have rights to a document preparation system that facilitates in the preparation of mortgage modification packages?

Yes       No

b. Can the mortgage modification packages be customized for each mortgage servicer?

Yes       No

c. Is the document preparation system integrated with the Portal system?

Yes       No

d. Can the document preparation system provide a Certificate of Completion to confirm the user has completed the process?

Yes       No

**BY:** \_\_\_\_\_  
Name:  
Title: