

## Loss Mitigation Final Report Instructions

Pursuant to W.PA.LBR 9020-4(f), as amended by General Order #2013-11, Debtor's Counsel is required to complete an online Final Report. The following information is required in order to complete the Report:

- The current and complete Portal History as a PDF ready to upload
- The last 4 digits of the Loan Number
- The details of any missed Deadlines (by Creditor or Debtor)
- The dates (and any applicable docket numbers) of all Requests, Reports, Extensions, Hearings, Status Conferences, Trial Loan Modifications, and Orders
- The specific details of the Final Outcome

You must complete every field prior to proceeding to the next screen. If your answer is "None," enter "0."

All Dates must be entered in mm-dd-yyyy format

Do not hit the back or forward browser buttons during the online Final Report process. If you discover an error at any point, you must select "Cancel" and begin a new Report.

After you have completed the online Final Report, review the accuracy of the information as you have entered it. If there are any errors, you must select "Cancel," which will then cancel your current online Final Report. If the information is accurate, select "Submit." Once you select "Submit," the Clerk's Office will docket the Final Report with the uploaded Portal History as an attachment, and a Notice of Electronic Filing will be issued as with any other docket event. If after selecting "Submit" you discover an error in the Final Report Survey, you must file a Motion with the Court to amend the Final Report.

**Step 1 - General Case Info, Portal History**

General Case Information	
1	Last 4 digits of Loan Number <input type="text"/>
2	Case Number <input type="text"/>
3	Full Name of Debtor(s) <input type="text"/>
4	Current Judge Assigned to the Case <input type="text" value="Judge Deller"/>
5	Bankruptcy Chapter <input type="text" value="7"/>
6	Full Name of Debtor(s)' Attorney <input type="text"/>
Portal Account History Upload (PDF format ONLY)	
7	Attach your completed Portal Account History <input type="button" value="Choose File"/> No file chosen
Notice of Request for Loss Mitigation	
8	How many Requests for Loss Mitigation were filed? <input type="text"/>
Step 1 of 8 <input type="button" value="Continue"/> <i>All items are required information. All dates must be in MM-DD-YYYY format</i>	

1. Enter the last four digits of the loan number for which you are filing this Final Report
2. Enter the Case Number
3. Enter the full name (including middle name) of Debtor and Joint Debtor (if applicable).
4. Select the current Judge assigned to the bankruptcy case.
5. Select the bankruptcy Chapter.
6. Enter the full name (including middle name) of Debtor’s Attorney.
7. Attach full DMM Portal History.
8. Enter the amount of Requests for Loss Mitigation filed for this loan. Any re-filed Requests for Loss Mitigation count as a separate Request for purposes of this Final Report.

After you have verified the information is accurate, select **Continue** to move on to the next screen.

**Step 2 - NFRLM**

General Case Information	
Case Number:	<input type="text"/>
Notice of Request for Loss Mitigation	
<b>LM Request 01</b>	
1	Date Request for Loss Mitigation was Filed <input type="text"/>
2	Docket Number of Request for Loss Mitigation <input type="text"/>
3	Name of Creditor/Lender/Service as appearing in Request <input type="text"/>
4	Name of Creditor/Lender/Service as registered on the Portal <input type="text"/>
5	Was this Request for Loss Mitigation denied or ordered to be re-filed by way of a Corrective Entry? <input type="button" value="No"/> ▾
6	If yes, reason for denial or corrective entry? <input type="text"/>
7	If yes, was the Request for Loss Mitigation re-filed? <input type="button" value="No"/> ▾
8	If yes, Docket Number of Request for Loss Mitigation <input type="text"/>
9	If no, why? <input type="text"/>
Loss Mitigation Order	
10	How many Loss Mitigation Orders were filed? <input type="text"/>
Step 2 of 8 <input type="button" value="Continue"/> <input type="button" value="Cancel"/>	

1. Enter the date the Request for Loss Mitigation was filed.
2. Enter the corresponding Docket Number of the Request for Loss Mitigation.
3. Enter the name of the Creditor/Lender/Service as it appears on the Request for Loss Mitigation.
4. Enter the name of the Creditor/Lender/Service as it appears on the DMM Portal .
5. If this Request was denied or ordered to be re-filed, select “Yes.” If not, select “No.”
6. If the Request was denied, enter a detailed explanation of the reason for the denial or corrective entry.
7. If the Request was denied, if the Request was re-filed, select “Yes.” If not, select “No.”
8. If the Request was re-filed, enter the Docket Number of the re-filed Request for Loss Mitigation.
9. If the Request was not re-filed, enter a detailed explanation why the Request was not re-filed.

*Repeat steps 1-5 until all information for each Request for Loss Mitigation is completed.*

10. Enter the amount of Loss Mitigation Orders filed. If there were no Loss Mitigation Orders filed, enter “0.”

After you have verified the information is accurate, select **Continue** to move on to the next screen. Select **Cancel** if you discover errors on the previous page or to exit this Report for any reason.

**Step 3 - Deadlines**

General Case Information

Case Number:

Loss Mitigation Order

1 

Order Filed Date	Docket Number
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

2  3

Deadlines

Did the Debtor fail to meet any of the LMP deadlines? No

Deadline Description	Deadline Date Missed
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

6  7  5

Did the Creditor fail to meet any of the LMP deadlines? No

Deadline Description	Deadline Date Missed
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

9  10  8

11 Was the Creditor Registered on the Portal at the time the LMO was issued? No

12 If no, Date the Creditor Registered on the Portal

13 Date Debtor uploaded a Complete Core LMP Package to the Portal.

14 Date Creditor Acknowledged Receipt of Debtor's Uploaded Information.

Status Report

15 How many Status Reports were filed?

Step 3 of 8

1. This box will not appear if there were no Loss Mitigation Orders.
  2. Enter the Date the Loss Mitigation Order was filed.
  3. Enter the corresponding Docket Number of the Loss Mitigation Order.
  4. Continue with steps 1 and 2 until all Loss Mitigation Order information is complete.
  5. Select "Yes" if the Debtor missed any LMP deadlines.
  6. If you selected "Yes," choose the deadline missed by the Debtor from the drop down menu (Options: Upload Complete Core LMP Package, File and Serve an LM Status Report, File and Serve an LM Final Report).
  7. Enter the date of the deadline that was missed.
- Repeat steps 6 and 7 until all information for each Deadline missed is complete.*
8. Select "Yes" if the Creditor missed any LMP deadlines.
  9. If you selected "Yes," choose the deadline missed by the Creditor from the drop down menu (Options: Register and Post entire Core LMP Package on the Portal, Acknowledge Receipt of Core LMP Package, and Designate Single Point of Contact for Debtor's Review).
  10. Enter the date of the deadline that was missed.

Deadlines - continued

Repeat steps 9 and 10 until all information for each Deadline missed is complete.

11. If the Creditor was registered on the Portal at the time the LMO was issued, select “Yes” and skip the next question. If the Creditor was not registered on the Portal, select “No.”
12. Enter the date the Creditor registered on the Portal in the box below.
13. Enter the date the Debtor uploaded a Complete Core LMP Package to the Portal.
14. Enter the date the Creditor Acknowledged Receipt of Debtor’s Uploaded Information.
15. Enter the amount of Status Reports filed. If no Status Reports were filed, enter “0.”

After you have verified the information is accurate, select **Continue** to move on to the next screen. Select **Cancel** if you discover errors on the previous page or to exit this Report for any reason.

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**Step 4 – Status Reports**

General Case Information	
Case Number: <input type="text"/>	

  

Status Report(s)					
1	<table border="1"><thead><tr><th>Date the Status Report was filed</th><th>Docket Number of the Status Report</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table>	Date the Status Report was filed	Docket Number of the Status Report	<input type="text"/>	<input type="text"/>
Date the Status Report was filed	Docket Number of the Status Report				
<input type="text"/>	<input type="text"/>				
2	<input type="text"/>				
3	<input type="text"/>				

  

Sua Sponte Deadline Extensions	
4	How many Extensions were granted sua sponte by a Judge? <input type="text"/>

Step 4 of 8

1. This box will not appear if there were no Status Reports filed.
2. Enter the date the Status Report was filed.
3. Enter the corresponding Docket Number of the Status Report.

Repeat steps 2 and 3 until all information for each Status Report filed is complete.

4. Enter the amount of Extensions granted sua sponte by a Judge.

After you have verified the information is accurate, select **Continue** to move on to the next screen. Select **Cancel** if you discover errors on the previous page or to exit this Report for any reason.

**Step 5 – Sua Sponte Deadlines**

General Case Information

Case Number: \_\_\_\_\_

**1** Sua Sponte Deadline Extensions

**Sua Sponte Extension 01**

**2** Name of Judge who ruled on the Extension. Judge Deller ▼

**3** Date Extension was granted. \_\_\_\_\_

**4** Docket number of corresponding Order/Text Entry. \_\_\_\_\_

**5** Reason for the Extension. \_\_\_\_\_

**6** Result of the Extension. \_\_\_\_\_

Deadline Extensions

**7** How many Extensions were Requested? \_\_\_\_\_

Step 5 of 8

1. This box will not appear if there were no Sua Sponte extensions.
2. Select the Name of the Judge who ruled on the Extension.
3. Enter the date the Extension was granted.
4. Enter the docket number of the corresponding Order/Text Entry.
5. Enter a detailed reason for the Extension (i.e. Creditor requested additional information and Debtor needs more time to gather requested documentation, etc.).
6. Enter the detailed result of the Extension (i.e. LMP termination period extended 60 days and LMP report period extended 90 days, etc.).

*Repeat steps 2-6 until all information for each Sua Sponte Extension is complete.*

7. Enter the amount of Extension Requests.

After you have verified the information is accurate, select **Continue** to move on to the next screen. Select **Cancel** if you discover errors on the previous page or to exit this Report for any reason.

**Step 6 – Extension Requests**

General Case Information

Case Number:

**1** Deadline Extensions

**Extension Request 01**

**2** How was the Extension Requested?

**3** If "Other"

**4** Request for an extension made by  on behalf of

**5** Date Request for an Extension was filed.

**6** Docket Number of Request for an Extension.

**7** Reasons for the Requested Extension.

**8** Name of Judge who ruled on the Requested Extension.

**9** Date of any corresponding Order/Text Order.

**10** Docket Number of Corresponding Order/Text Order.

**11** The Request was.

**12** List deadline extended and number of days.

<input style="width: 95%;" type="text"/>	Days:	<input style="width: 20px;" type="text"/>
<input style="width: 95%;" type="text"/>	Days:	<input style="width: 20px;" type="text"/>
<input style="width: 95%;" type="text"/>	Days:	<input style="width: 20px;" type="text"/>
<input style="width: 95%;" type="text"/>	Days:	<input style="width: 20px;" type="text"/>

**13** Reason for denial of the Extension.

Requests to Terminate/Withdraw Loss Mitigation

**14** How many Requests to Terminate/Withdraw were filed?

Step 6 of 8

1. This box will not appear if there were no Extension Requests.
2. Select the manner in which the Extension was Requested from the drop down menu (Options: Status Report, Motion, Other).
3. If you have selected "Other," enter a detailed explanation.
4. Enter the name of the attorney that made the Extension Request and who he/she represents (Options: Debtor or Creditor).
5. Enter the date the Extension Request was filed.
6. Enter the Docket Number of the corresponding Extension Request.
7. Enter a detailed reason for the Extension Request (i.e. Creditor needs additional time to review the file because Debtor recently provided documentation).
8. Select the name of the Judge who ruled on the Extension Request.
9. Enter the date of any corresponding Order/Text Order.
10. Enter the docket number of the corresponding Order/Text Order.
11. Choose the corresponding outcome of the Extension Request (Options: Granted or Denied).

12. If the Extension Request was Granted, list each deadline extended and the corresponding amount of the extension (i.e. LMP termination period – Days: 60, LMP Report period – Days: 90, etc.)
13. If the Extension Request was Denied, enter a detailed explanation for the denial (i.e. Judge determined too many extensions already granted, etc.).

*Repeat steps 2-13 until all information for each Extension Request is complete.*

14. Enter the amount of Requests to Terminate/Withdraw filed.

After you have verified the information is accurate, select **Continue** to move on to the next screen. Select **Cancel** if you discover errors on the previous page or to exit this Report for any reason.

### Step 7 – Request to Terminate/Withdraw

General Case Information

Case Number:

**1** Requests to Terminate/Withdraw Loss Mitigation

**Termination/Withdraw Request 01**

**2** Date Request to Terminate/Withdraw was filed

**3** Docket Number of Request to Terminate/Withdraw

**4** Request made by  on behalf of Creditor ▼

**5** Reasons for the Request to Terminate/Withdraw

**6** The Request was. Granted ▼

**7** Name of Judge who ruled on the Request to Terminate/Withdraw. Judge Deller ▼

**8** Nature of proceeding for review of the Request to Terminate/Withdraw. Hearing ▼

**9** If 'Other' enter proceeding type.

**10** Date corresponding Order was filed.

**11** Docket Number of any corresponding Order.

Hearing or Status Conference

**12** How many Hearings or Status Conferences were held related to Loss Mitigation?

Step 7 of 8
Continue
Cancel

1. This box will not appear if there were no Requests to Terminate/Withdraw.
2. Enter the date the Request to Terminate/Withdraw was filed.
3. Enter the docket number of the corresponding Request to Terminate/Withdraw.

*Termination/Withdraw Request – continued*

4. Enter the name of the Attorney who requested the Termination/Withdrawal and the party he/she represents (Options: Creditor or Debtor).
5. Enter a detailed reason for the Request to Terminate/Withdraw (i.e. Debtors' loan was modified previously, etc.).
6. Choose the corresponding outcome of the Request to Terminate/Withdraw (Options: Granted or Denied).
7. Select the name of the Judge who ruled on the Request to Terminate/Withdraw.
8. Select the nature of the proceeding for review of the Request to Terminate/Withdraw (Options: Hearing, Status Conference, Sua Sponte, Other).
9. If you selected "Other," enter the proceeding type.
10. Enter the date the corresponding Order was filed.
11. Enter the docket number of the corresponding Order.

*Repeat steps 2-11 until all information for each Request to Terminate/Withdraw is complete.*

12. Enter the amount of Hearings or Status Conferences held related to Loss Mitigation.

After you have verified the information is accurate, select **Continue** to move on to the next screen. Select **Cancel** if you discovered errors on the previous page or to exit this Report for any reason.

**Step 8 – Hearing or Status Conferences**

General Case Information	
Case Number:	<input type="text"/>
<b>1</b> Hearings or Status Conferences	
<b>Hearing/Status Conference 01</b>	
<b>2</b> Date of Hearing or Status Conference	<input type="text"/>
<b>3</b> Presiding Judge	Judge Deller <input type="button" value="v"/>
<b>4</b> Subject of Hearing/Status Conference	<input type="text"/>
<b>5</b> Outcome of Hearing/Status Conference as Determined by the Judge	<input type="text"/>
<b>6</b> Was an Order issued by the Judge on the Matter Presented at the Hearing or Status Conference?	No <input type="button" value="v"/>
If yes:	
<b>7</b> Date of the Order	<input type="text"/>
<b>8</b> Docket Number of Order	<input type="text"/>
Trial Loan Modification	
<b>9</b> Was there a Trial Loan Modification?	No <input type="button" value="v"/>
<b>10</b> Was there an Interim Mortgage Modification Order?	No <input type="button" value="v"/>
If yes	
<b>11</b> Date of the Order	<input type="text"/>
<b>12</b> Docket Number of Order	<input type="text"/>
Outcome	
<b>13</b> What was the outcome of the LMP in this case?	Modification Denied <input type="button" value="v"/>
<b>14</b> Outcome if 'Other'	<input type="text"/>
<b>15</b> Details, and Terms if applicable	<input type="text"/>
Attorney Information	
<b>16</b> Attorney ID:	<input type="text"/>
<b>17</b> Attorney Email Address:	<input type="text"/>
<b>18</b> Attorney Mailing Address:	<input type="text"/>
<b>19</b> Phone Number	<input type="text"/>
Step 8 of 8 <input type="button" value="Review and Finalize"/> <input type="button" value="Cancel"/>	

1. This box will not appear if there were no Hearings or Status Conferences related to Loss Mitigation.
2. Enter the date of the Hearing or Status Conference.
3. Select the Presiding Judge of the Hearing or Status Conference.
4. Enter a detailed explanation of the subject of the Hearing or Status Conference (i.e. Compliance with LMP Order, etc.).
5. Enter a detailed explanation of the outcome of the Hearing/Status Conference as determined by the Judge (i.e. LMP termination period extended 60 days, OTSC issued, etc.).
6. If there was an Order issued by the Judge on the Matter Presented at the Hearing or Status Conference, select "Yes." If not, select "No."

*Hearing or Status Conferences - continued*

7. If an Order was issued, enter the date of the Order.
8. If an Order was issued, enter the docket number of the Order.

*Repeat steps 2-8 until all information for each Request to Terminate/Withdraw is complete.*

9. If there was a Trial Loan Modification, select "Yes." If not, select "No."
10. If there was an Interim Mortgage Modification Order, select "Yes." If not, select "No."
11. If there was an Interim Mortgage Modification Order, enter the date of the Order.
12. If there was an Interim Mortgage Modification Order, enter the docket number of the Order.
13. Select the Outcome of the LMP in this case from the drop down menu (Options: Modification Denied, Loan Modification, Trial Loan Modification, LMP Terminated/Withdrawn, Debtor Rejected Loan Modification Terms Offered, Case Dismissed Prior to Conclusion of LMP Process, and Other).
14. If Outcome selected is "Other," enter a detailed explanation of the Outcome.
15. Enter a detailed reason for the outcome and any terms of the modification (if applicable) (i.e. Debtor denied loan modification terms offered because it would have increased her payment, Creditor rejected loan modification because Debtor's debt-to-income ratio was too high, etc.).
16. Enter your Attorney ID number.
17. Enter your e-mail address.
18. Enter your mailing address.
19. Enter your phone number.

After you have verified the information is accurate, select **Review and Finalize** to move on to the next screen. Select **Cancel** if you discover errors on the previous page or to exit this Report for any reason.

Loss Mitigation Final Report Instructions

Final Report and Submission

**Loss Mitigation Final Report**

Debtors		Case No.	
Loan No.	xx	Judge	Judge Jeffery A. Deller
Debtors Attorney		Ch.	7

**Requests for Loss Mitigation**  
There is 1 Request for Loss Mitigation ("Request")

**Request 01**  
The Request was filed on 00/00/0000 at docket no. 0  
The Creditor Name on the Request is  
The Creditor Name as registered on the Portal is  
The Request was **granted**

**Loss Mitigation Order**  
There is 1 Loss Mitigation Order ("LMO")

**LMO 01**  
The LMO was filed on 00/00/0000 at docket no. 0

**Deadlines**  
The Debtor did not miss any LMP deadlines  
The Creditor did not miss any LMP deadlines

The Creditor Registered on the Portal on 00/00/0000  
The Debtor uploaded a Complete Core LMP Package to the Portal on 00/00/0000  
The Creditor Acknowledged Receipt of Debtor's Uploaded Information on 00/00/0000

**Status Report**  
There is 1 Status Report filed

**Status Report 01**  
The Request to Terminate/Withdraw was **granted** by Judge Jeffery A. Deller by way of Hearing

**Hearings or Status Conferences**  
There is 1 Hearing/Status Conference related to loss mitigation

**Hearing/Status Conference 01**  
The Hearing/Status Conference was held on 00/00/0000 before Judge Jeffery A. Deller regarding  
Outcome:  
No order was issued

**Trial Loan Modification**  
There are 0 Trial Loan Modification  
There was not an Interim Mortgage Modification Order

**Outcome**  
The outcome of the LMP was **Modification Denied**  
Details, and Terms if applicable:

I have reviewed the details set forth above. By pressing "Submit" I, , am verifying, subject to perjury, the accuracy of the information set forth in this Loss Mitigation Final Report.

Attorney ID#: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
  
Attorney for: \_\_\_\_\_

Date Report Completed: 09/27/2013

This is a preview of the Final Report you have generated. Review the accuracy of the information as you have entered it. If there are any errors, you must select **Cancel**, which will then cancel your current online Final Report. If the information is accurate, select **Submit**.

Once you select **Submit**, the Clerk's Office will docket the Final Report with the uploaded Portal History as an attachment, and a Notice of Electronic Filing will be issued as with any other docket event. If after selecting **Submit** you discover an error in the Final Report Survey, you must file a Motion with the Court to amend the Final Report.

You will receive confirmation that your LMP Final Report has been accepted.