



Document Management System for QC Postfunding Review

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Quick Overview: How to Submit Documents to FM Processing

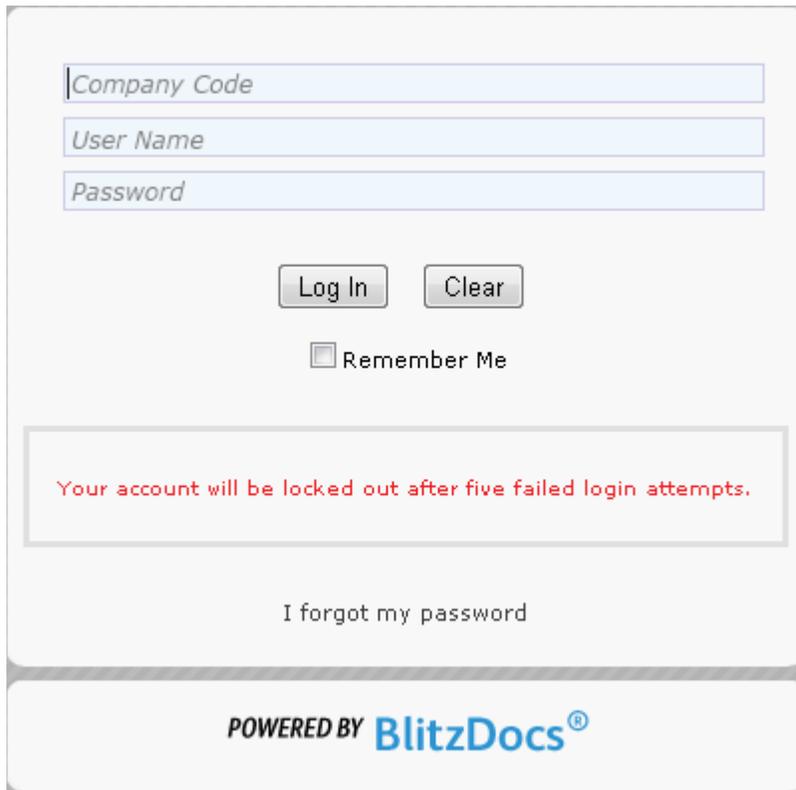
Below are the quick steps to upload documents, please make sure your file conforms to the guidelines for the attachment type.

- 1.) Go to DMS (<https://www.blitzdocs.net/DotNet/Login.aspx?ReturnUrl=%2fdefault.asp>)
- 2.) Sign into DMS
- 3.) Enter the FM Loan Number, select Search
- 4.) Go to Documents, Select Upload
- 5.) Select Document Type from the menu dropdown
- 6.) Click Browse to locate the file to be uploaded
- 7.) Select Submit
- 8.) Select Folder View
- 9.) Click File Submission, Select Submit to Processing

Please note that once the file is Submitted to Processing you can no longer access the option to upload a loan file. If you need to resubmit the file, contact the mailbox (SFQC_BLZ_Security@freddiemac.com) to have the folder reopened. Once the file is Submitted to Processing additional document types will become available for your use to upload Additional Documents, Missing Documentation, Appeals and Incomplete Documents.

How to Log in to the Document Management System (DMS)

To log into the site from the Internet, users will connect to www.blitzdocs.net via Internet Explorer.



Company Code

User Name

Password

Log In Clear

Remember Me

Your account will be locked out after five failed login attempts.

I forgot my password

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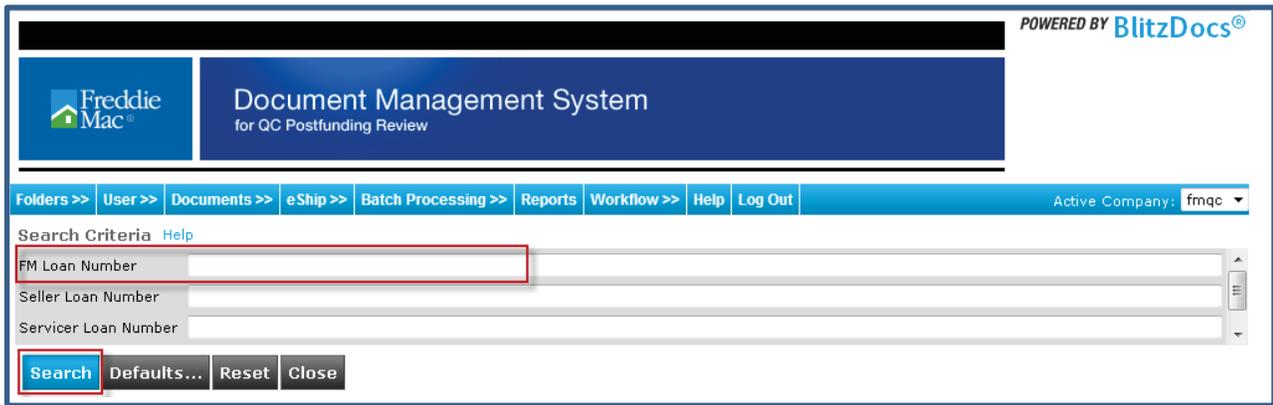
The system will prompt for a Company Code, User name and Password. You will use **fmqc** for the company code. Your User name and Password are supplied by your Freddie Mac Quality Control representative.

How to Search for a Folder

NOTE: Users do NOT have the ability to create new folders. Folders will be created by the Freddie Mac QC team within 72 hours of the file request.

Enter the Freddie Mac Loan Number in the FM Loan Number field on the Search Criteria screen. Click Search at the bottom left hand side of the screen.

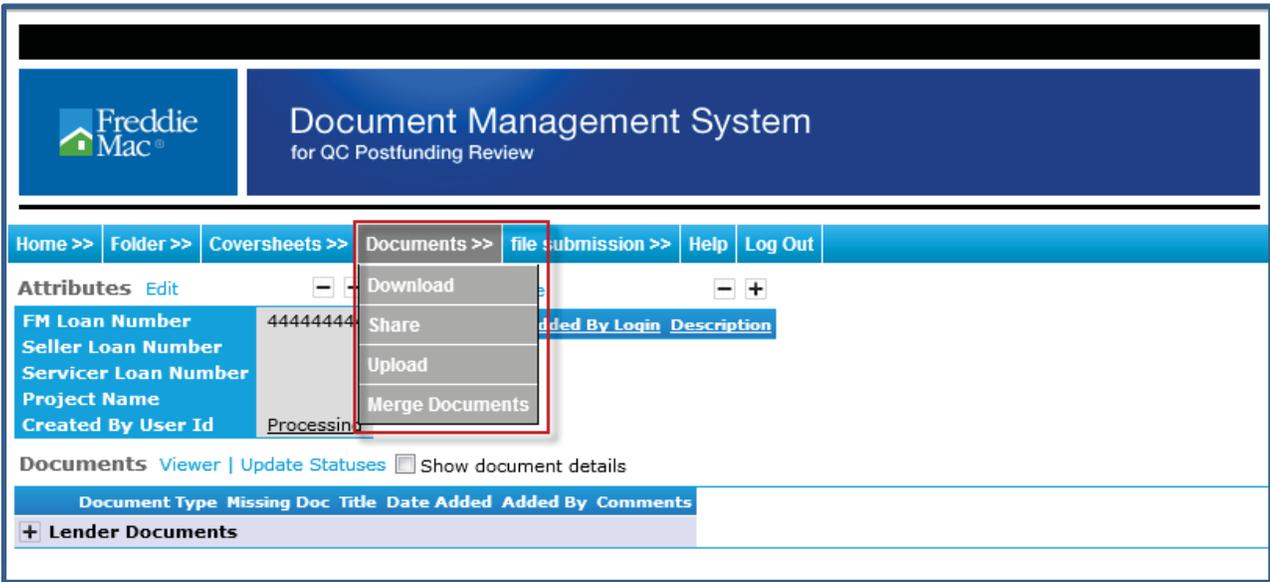
If the folder you are searching for does not display, it means that it has not yet been created by the Freddie Mac QC team.



How to Add Documents to a Folder

Documents can be uploaded once the user is in the FM Loan Folder. The upload functionality allows users to upload files one at a time. (Prior to uploading your loan files, please refer to the Appendix for basic file format guidelines, naming conventions and restrictions.)

In the **Folder View**, mouse over the **Documents** tab and then select **Upload**.



- Select the appropriate Document Type from the dropdown*

Home >> Folder >> Coversheets >> Documents >> file submission >> Help Log Out

Upload document to folder

File contains coversheets

Document Type: 1Loan File-Customer alphabetic stacking order

Title: 1Loan File-Customer

Comments: 2Original Loan File-Customer

File: 3Additional Loan File-Customer

Additional Documentation-Customer

Appeals-Customer

Incomplete Loan File-Customer

Missing Documents-Customer

Browse...

*Available document types include:

Prior to the Loan File being Submitted to Processing:

1Loan File-Customer (aka-Subject Loan File) *Make this a table*

2Original Loan File-Customer (aka-Loan file supporting the original mortgage transaction)

3Additional Loan File-Customer (aka-additional refinance loan files)

After the Loan File is Submitted to Processing: * These Document Types are not available until the loan file is submitted to processing.***

Additional Documentation-Customer (aka-documentation not currently requested by Freddie Mac)

Appeals-Customer (Please note that documents uploaded under this category require an Appeal letter and are subject to verification)

Incomplete-Customer

Missing Documents-Customer

- Browse for the file you wish to upload. (Loan files must consist of a single stacked pdf. No multiple pdf files will be accepted.) Once the file is located, click on the Open button to upload the selected file.

Home >> Folder >> Coversheets >> Documents >> file submission >> Help Log Out

Upload document to folder

File contains coversheets

Document Type: 1Loan File-Customer alphabetic stacking order

Title:

Comments:

File: H:\HopeAlbert\OLF.pdf

Browse...

There is a new version of the file upload object available.
Go to the [BlitzDocs ActiveX Controls updates](#) page to download the latest version.

Submit Close

- Once the document has been selected, click **“Submit”** at the bottom left-hand side of the screen.

- The following message will display:

The document was successfully committed for indexing.
 There may be a delay until the document processing is completed and it becomes available.

[Back to Folder View](#)
[Back to Upload Documents](#)

- Click [Folder View](#) to return to the main folder.

Freddie Mac Document Management System for QC Postfunding Review

Home >> Folder >> Coversheets >> Documents >> **file submission >>** Help Log Out

Attributes Edit - + Notes Add Note - +

FM Loan Number 444444444
 Seller Loan Number
 Servicer Loan Number
 Project Name
 Created By User Id Processing

Documents Viewer | Update Statuses Show document details

Document Type	Missing Doc	Title	Date Added	Added By	Comments
Lender Documents					
		1Loan File-Customer	Loan File	03-17-2014	fmqc\customer

- If you wish to view the document that was uploaded, click on the document icon.

Finalize Submission to Processing

- Click on the File Submission Tab, and then select Submit to Processing to notify the FMQC team that the file is ready to be picked up.

Freddie Mac Document Management System for QC Postfunding Review

Home >> Folder >> Coversheets >> Documents >> **file submission >>** Help Log Out

Attributes Edit - + Notes Add **Submit to Processing** - +

FM Loan Number 444444444
 Seller Loan Number
 Servicer Loan Number
 Project Name
 Created By User Id Processing

Documents Viewer | Update Statuses Show document details

Document Type	Missing Doc	Title	Date Added	Added By	Comments
Lender Documents					
		1Loan File-Customer	Loan File	03-17-2014	fmqc\customer

- A message will return indicating that the file was successfully submitted.



Document Management System

for QC Postfunding Review

[Home >>](#) [Folder >>](#) [Coversheets >>](#) [Documents >>](#) [file submission >>](#) [Help](#)

file submission: Submit to Processing

The file submission item 'Submit to Processing' has successfully been processed.

To return to the folder click [here](#).

How to Confirm Your Files Were Uploaded

Users can run the “Document Search by User Added” report to identify:

- FM Loan Number
- Document Type(s) that have been uploaded
- User ID of the person(s) who uploaded the document(s)
- Whether or not the documents were received

Document Search						
for 3 Document Types added during the period 2/1/2014 - 2/20/2014						
FM Loan Number	Document Type	Status	Date Folder Created	Added By	Date Document Added	Page Count
123456789	1Loan File-Customer	File Received	1/27/2014	fmqc\111111a	2/10/2014	150
098765432	1Loan File-Customer	File Received	12/23/2013	fmqc\111111b	2/13/2014	189
246810121	1Loan File-Customer	File Received	1/27/2014	fmqc\111111c	2/10/2014	134
359121518	1Loan File-Customer	File Received	1/27/2014	fmqc\111111d	2/10/2014	485

To generate the report:

- Click on the Reports Tab from the main/Search Criteria Screen.
- Select the date range and Document Type to search on. (clicking the + sign to the right of the Document Type field allows the option to click more than one Document Type listed.)
- Click on the Seller Servicer dropdown field.
- Click Submit at the bottom left-hand corner of the screen.

The screenshot shows the Freddie Mac Document Management System interface. At the top left is the Freddie Mac logo. To its right, the text reads "Document Management System for QC Postfunding Review". Below this is a navigation bar with tabs: "Folders >>", "User >>", "Documents >>", "eShip >>", "Batch Processing >>", "Reports" (highlighted with a red box), and "Help". Under the "Reports" tab, the "Report" dropdown menu is set to "Document Search By User Added" (highlighted with a red box). Below the report selection, there are "Format Options" including "Zoom" (set to 100%) and "Format" (set to HTML). Under "Report Parameters", there are fields for "Document Added Start" and "Document Added End" (both with calendar icons), "Document Type" (with a plus sign to its right), and "Seller Servicer" (with a plus sign to its right). At the bottom left, there are three buttons: "Submit" (highlighted with a red box and a green arrow), "Reset", and "Close".

System Configurations

Browser

Microsoft Internet Explorer

Currently, the only browser supported by the Delivery Portal is Internet Explorer. Also, please note that only the most recent versions (with the current services packs applied) are supported. While older versions may function correctly, some problems may occur that can only be supported if the current service packs for the browser have been applied.

To check the version of your current browser, select "About Internet Explorer" from the Help menu. A dialog similar to the one shown below will appear.



Compare the version number shown on **your** browser's 'about dialog' to those listed below. The version number must be equal to or greater than those shown in the table. If you need to upgrade your browser, please download the appropriate updates from Microsoft.

Browser	Current Version Number
Internet Explorer 6.0	6.0.3790.3959
Internet Explorer 7.0	7.0.5730.11
Internet Explorer 8.0	8.0.6001.18702
Internet Explorer 9.0	9.0.8112.16421
Internet Explorer 10.0	10.0.9200.16384
Internet Explorer 11.0	11.0.9600.17280

Internet Security Settings

Why change security settings?

Some of the pages on the BlitzDocs™ site utilize ActiveX controls to enhance the functionality provided by your browser. Some of these ActiveX controls perform local file operations on your computer. For example, if you want to have a progress indicator when uploading files to BlitzDocs™, an ActiveX control is utilized to read the file from your hard drive and post it to the web server.

Normally, you wouldn't want to allow a web site to access files on your computer without your knowledge and approval. For this reason, ActiveX controls that perform local file operations should always be marked as "unsafe" for scripting. This setting alerts the browser that special security settings are required in order to allow the control to run. If the control is not marked as "unsafe", the potential exists for the operator of a malicious web site to use that ActiveX control in their code to access files on your computer without first warning the user or requiring additional configuration steps.

The side effect is that your browser, by default, will not allow controls that are marked as "unsafe" to run, even controls from sites that you trust. The easiest and safest way to enable controls from a trusted site to run is to add the site to your browser's list of "Trusted sites" and enable certain privileges for only "Trusted sites".

Microsoft Internet Explorer

To add BlitzDocs.net to your trusted sites in Internet Explorer, go to the Tools/Internet Options menu item.

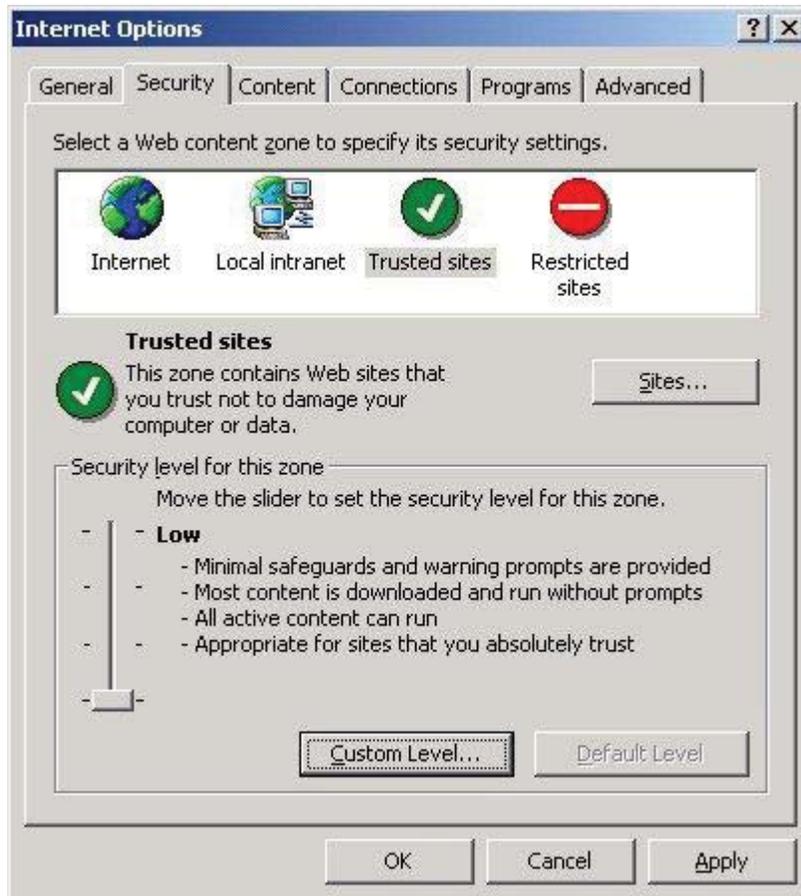
In the options dialog, go to the Security tab and click on the Trusted Sites icon.

From there, click on the Sites... button then add <https://www.blitzdocs.net> to the list of trusted sites and click OK.



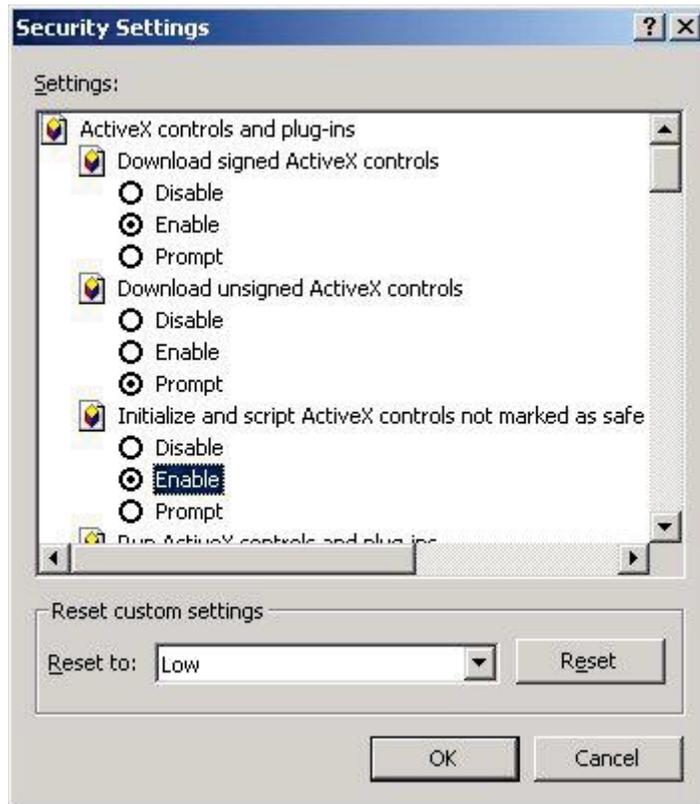


Once you have added the BlitzDocs site to your trusted sites, you will also need to check the security level for that zone. If the settings are currently set to "Low", they should be compatible with the BlitzDocs controls.



If the settings are at a "Custom Level...", you will need to verify that the following settings are marked as "Enable" or "Prompt":

- download signed ActiveX controls
- initialize and script ActiveX controls not marked as safe
- run ActiveX controls and plug-ins



Adobe Acrobat

Installation

Acrobat Reader is required to view documents from the site. Again, only the most recent version can be supported. To check your version of Adobe Acrobat Reader, launch the reader and select "About Acrobat Reader" from the help menu. The version number is listed at the bottom of the dialog.

BlitzDocs ActiveX Controls

Description

BlitzDocs makes use of ActiveX technology to enhance certain features through ActiveX objects. The use of these objects is optional; however, they will enable you to do the following:

- you will see a progress indicator when uploading an existing electronic file to BlitzDocs
- you will be able to use the BlitzDocs Enhanced File Upload capability, which includes:
 - select multiple files to be uploaded
 - drag/Drop or Copy/Paste files from your desktop

Before Installation

Make sure you have the most current version of your browser.

Make sure your browser security settings are setup for ActiveX controls.

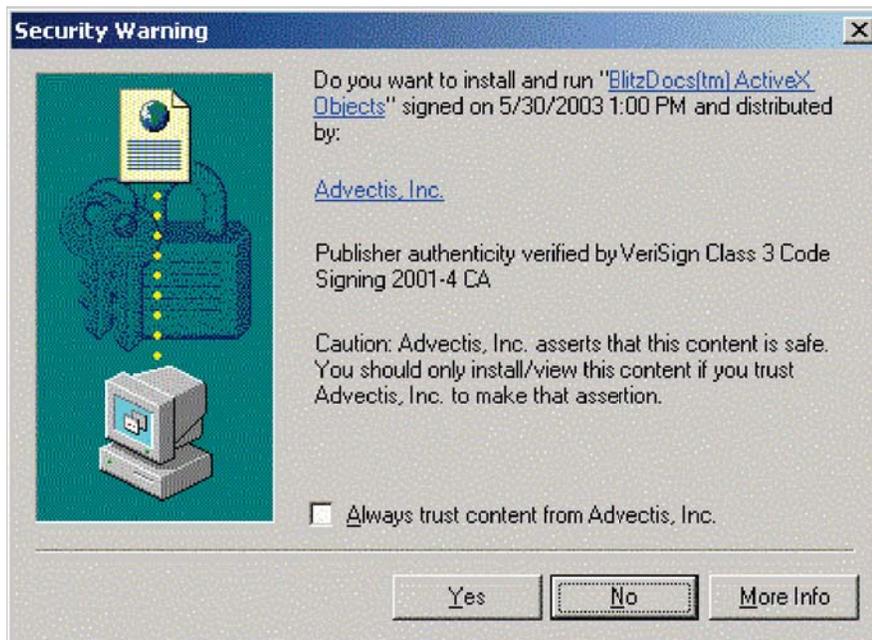
Installation

To install the BlitzDocs ActiveX objects, you must have successfully logged on the BlitzDocs website. Navigate to the Help tab and click on Support. Next, click on the BlitzDocs Custom Active X Controls link and click on the Click [HERE](#) to install Active X Controls hyper link. (Screenshot of what you will see is below)

NOTE: Installing these components may require that you reboot your computer.

 Click [here](#) to install Active X Controls

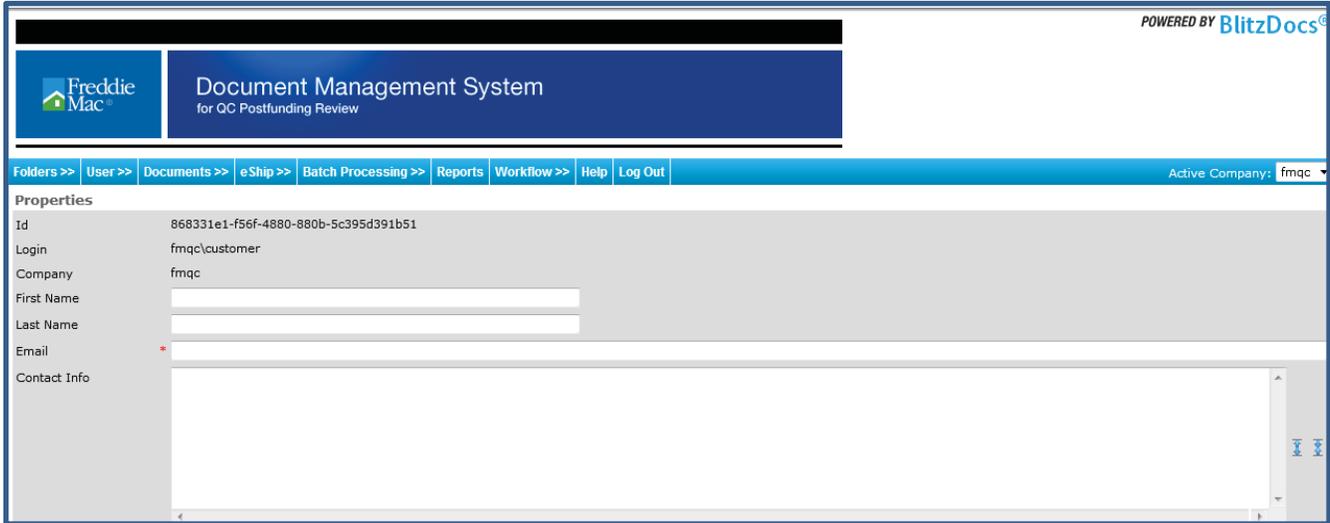
You may get a dialog like the following. Select Yes to Install.



How to Update Your User Profile

The User tab in the Loan Delivery Portal allows users to manage their individual user profiles and passwords.

Each user's profile is designed to include company name and contact information. To update the user profile, select **User** then **Profile** from the main menu. This will take users to the following page allowing changes to First Name, Last Name, E-Mail Address and Additional Contact Info.



The screenshot shows the 'User Profile' page in the 'Document Management System for QC Postfunding Review'. The page is powered by BlitzDocs. The navigation menu includes 'Folders >>', 'User >>', 'Documents >>', 'eShip >>', 'Batch Processing >>', 'Reports', 'Workflow >>', 'Help', and 'Log Out'. The active company is 'fmqc'. The 'Properties' section displays the following information:

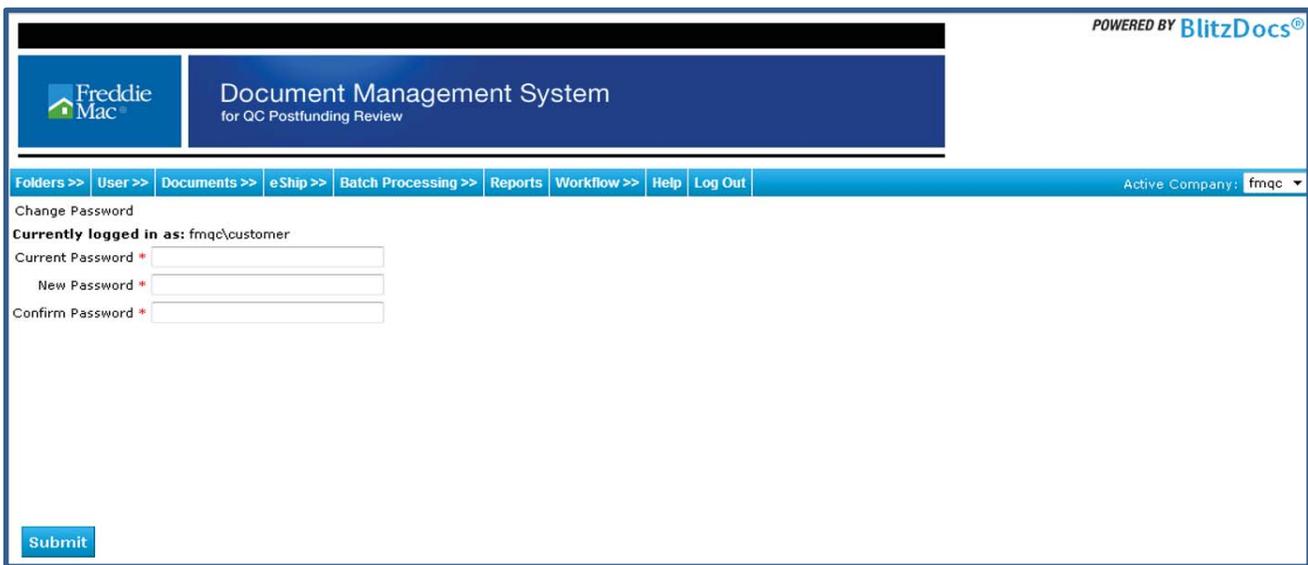
Id	868331e1-f56f-4880-880b-5c395d391b51
Login	fmqc\customer
Company	fmqc
First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Contact Info	<input type="text"/>

To save changes to the user profile, select the **Update** link at the bottom of the page.

Note: Multiple e-mail addresses, separated by a comma, may be entered to facilitate a manager or another party to be copied on notifications.

How to Change Your Password

To change the user's password, select **User** then **Password** from the main menu.



The screenshot shows the 'Change Password' page in the 'Document Management System for QC Postfunding Review'. The page is powered by BlitzDocs. The navigation menu includes 'Folders >>', 'User >>', 'Documents >>', 'eShip >>', 'Batch Processing >>', 'Reports', 'Workflow >>', 'Help', and 'Log Out'. The active company is 'fmqc'. The page displays the following information:

Change Password

Currently logged in as: fmqc\customer

Current Password *

New Password *

Confirm Password *

Enter the current password, then the new password, followed by a second entry of the new password to confirm. To save this information, click change at the bottom of the page. To maintain secure access, we recommend users change their password immediately upon logging into the system for the first time.

How to Reset Your Password

If you need a password reset, enter your User Name and select I forgot my password. This will send a password reset link to the email address that is registered for the user account. After 5 failed login attempts the account will lock. The lockout period will expire after 15 minutes and you can try again.

Appendix

Delivery Specifications / Restrictions for Imaged File Delivery via the Loan Portal

Due to system restraints and limitations we require imaged files to be delivered within certain specification and formats. Below outlines the criteria for imaged loan file delivery:

ACCEPTED/REQUIRED CRITERIA:

- Stacked in one bookmarked pdf or one **stacked** pdf if the file is not bookmarked.
- No multiple pdf file deliveries.

UNACCEPTABLE CRITERIA:

- Files consisting of single page TIFF documents.
- Other program-driven file types (e.g. Word, Text, HTML).
- Excel documents consisting of multiple tabs.

INDEXING:

- QC requires a basic level of file organization and a consistent format.
 - ✓ For example – we ask that loan documents be grouped in categories such as the ones found in the Appendix, Table One.

NAMING CONVENTIONS:

- QC prefers the following naming convention for files or file folders:
 - ✓ Freddie Mac Loan Number_Your Loan Number
- If sending a supporting file (e.g. an original loan file to accompany the requested QC review file), the original loan file should be named:
 - ✓ Freddie Mac Loan Number_REFI
- Customers should not change naming conventions without approval from Freddie Mac.

DOCUMENT PASSWORDS:

- The security method for the documents should be set to “no security” and the documents restriction summary should be “allow all”.
- No documents delivered to Freddie Mac should contain primary or secondary passwords (generally these are applied by third party vendors that customers use, e.g. appraisal, title work).

DOCUMENT IMAGING QUALITY:

- Customers should deliver one loan file that has good image quality so they can be successfully reviewed.
- Limit each file size to 48.8 MB.
- Limit each file to 1,500 pages.

MULTIPLE LOAN DELIVERY FOR ONE LOAN:

- Do not co-mingle files in the case of multiple file delivery for one loan files. (Our imaging group has to pull these apart, and this may cause issues.)
-

Example of File Organization:

APPENDIX – TABLE 1	Section Name
	Loan Approval
	Loan Transmittal
	Application
	Collateral
	Review Appraisal
	Credit Report and Debt Verification
	Employment / Income
	Assets
	Sales Contract
	Miscellaneous Origination
	HUD - 1
	Note and Mortgage
	Closing
	Title
	Flood
	Mortgage Insurance
	Compliance
	Post Closing
	Reverification
	FHA
	VA