Import Template Definitions

To assist with questions regarding the new Import Template please use the following definitions/guidelines when completing or reviewing the template for a new foreclosure file. Complete **ALL** fields that have information on your corresponding documents that you are submitting. DO NOT CHANGE TEMPLATE.xlsx.

TAB – LAW FIRM

Law Firm Name – name of the firm exacting how it is listed on the Notice of Election and Demand (NED)

Attorney Name – only provide the ONE attorney name that signed the Notice of Election and Demand (NED)

Attorney Bar Number - only provide the ONE attorney bar number for the attorney that signed the Notice of Election and Demand (NED)

Firm File Number – please provide the number or reference name that the law firm uses to access the file

Reason for Default – please match exactly the DEFAULT reason you put on your Notice of Election and Demand (NED)

TAB – PROPERTY

This information is from the Deed of Trust only – and should be on your Notice of Election and Demand (NED)

Address (1-2), City, State and Zip – provide the purported common address from the Deed of Trust. If none is given, then these fields will be BLANK on the Import Template.

Legal Description – Unlimited Field. Please put your entire legal description in this field instead of using Attached Exhibit A. If you have an Attached Exhibit A to your NED, please put the full legal description in the Template (no Exhibit A in WORD format needed)

Agricultural (Y/N) – If property is not deemed Agricultural, mark field N. If property is deemed Agricultural, mark the field Y, and request instruction on how to obtain an Agricultural Statement from the County Assessor.

TAB – DEED OF TRUST

This information is from the Deed of Trust only – and should be on your Notice of Election and Demand (NED)

DOT Date – date the DOT was executed

Recorded Date – date the DOT was recorded

Reception No. –reception no. for the date the DOT was recorded

Re-Recorded Date – if applicable, add 2nd DOT recording date

Reception No. – if applicable, add 2nd DOT reception no.

Book & Page – if applicable

Scrivener's Recording Date – if applicable, add date the affidavit was recorded

Scrivener's Reception No. – if applicable, add the reception no.

Scrivener's Verbiage – if applicable, add exact verbiage that was put on the NED after the legal description.

TAB – LOAN

Original Beneficiary – Original Lender on the DOT
Current Beneficiary – Current Lender via assignments/allonges (full title chain is not needed)
Loan Type – CONV/HUD/VA/FNMA/FHLMC etc.
Servicer – if applicable, match the information exactly as you put it on the Statement of Loan Server (SLS)
Original Principal Balance – Original amount of the loan on the Note and DOT
Outstanding Principal Balance – Amount of principle balance owing (without any fees or costs added) NOTE: if outstanding principal balance is more than the original principal balance you **MUST** submit a Loan Modification or state how this amount can be more than the original.
As of Date – this date can be the date the law firm received the file OR the date the loan is due for. Either date is fine. It just can't be a future date.
Interest Rate – interest rate at the time of the referral / submission date to PT office
Adjustable (Y/N) – If an adjustable-rate NOTE, mark the filed Y, if not mark N
Copy of Evidence of Debt (Y/N) – If submitting a copy of the NOTE, mark the filed Y, if sending original NOTE, mark the field N

TAB – OWNER

Original Grantor – Original Borrowers on the DOT
Owner – Current owner(s) of the property. Match exactly what you put on the Affidavit of Current Owner (ACO)
Address (1-2), City, State and Zip – Address of the current owner. Match exactly what you put on the Affidavit of Current Owner (ACO). NOTE we can only enter one address in GTS. If multiple owners, pick one address for the ACO and put the rest on the Mailing List.

TAB – MAILING LIST

Match your Mailing List document exactly. Make sure you have the same number of mailings on your Mailing List document that you have entered into the Template.
Mailing List no longer needed in WORD format.
Name, Address (1-2), City, State and Zip – repeat as many as needed
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