



HomePath for Short Sales

User Guide for Fannie Mae Agents

HomePath for Short Sales, powered by Aspen Grove





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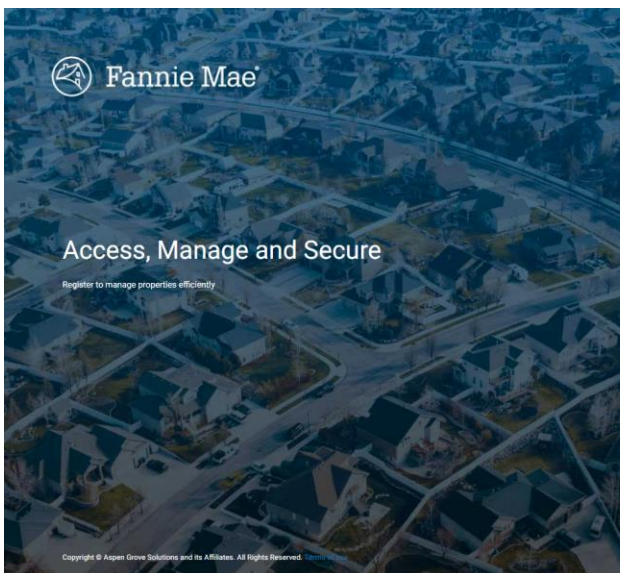


Introduction

Welcome to the Fannie Mae HomePath Short Sales Platform, powered by Aspen Grove, a comprehensive solution designed to streamline your work as a Fannie Mae agent. This user guide will walk you through the various features and functionalities of the platform, ensuring you have a smooth onboarding experience and can efficiently manage your tasks and cases.

Registering

If you are a new Fannie Mae agent, you will need to register to access the portal. Selecting the register option from HomePath Short Sales tab or going to <https://ags.aspengrove.net/Landing/FNMA.aspx> will bring you to the login page where you can choose the register option- enter your First Name, Last Name, Email, & Cell details. Once you have entered your data, select Next.



1 of 3

Account Setup

CONTACT INFORMATION

First Name *

Please enter your first name

Last Name *

Please enter your last name

Email *

Please enter your e-mail address

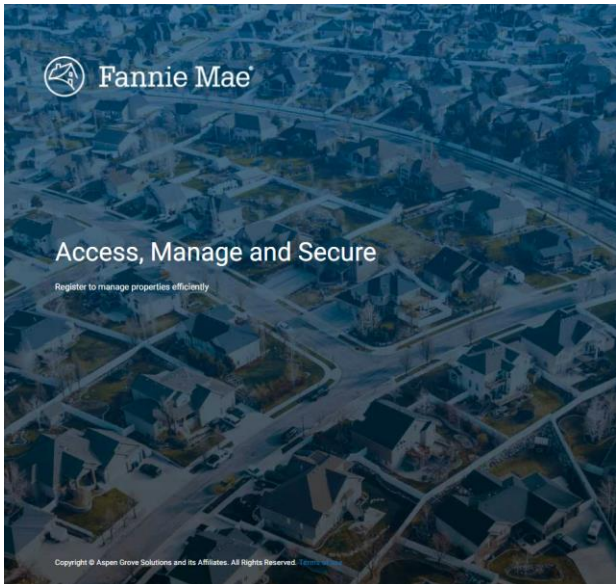
Cell Number *

000-000-00000

Next

Powered by  aspengrove

Provide your company information, including Name, Address, Phone, Real Estate License #, and State. Complete the reCAPTCHA, and once you have read the Terms of Use and Privacy Policy, you can select 'Agree and Sign Up'.



2 of 3

Account Setup

COMPANY CONTACT INFORMATION

Company (Agent/Broker) *

Carter Real Estate

Agent Office Phone *

123-456-8790

Office Phone *

321-654-7895

Fax

000-000-00000

Address *

123 Main Street

City *

DALLAS

State *

Texas

Zip Code *

75202

Real Estate License # *

Texas 87956

State *

Texas

I'm not a robot



By clicking Agree & Sign Up, you agree to Aspen Grove Solutions Terms of use, Privacy Policy

Back

Agree and Sign Up

Powered by aspengrove

You will be sent an email confirming your registration which will include a link to set your account password.



3 of 3

Confirm email address

We have sent an email to tom@carter.com



You are now 1 step away from registering with Fannie Mae, to finalize your registration, click the link in the email sent to tom@carter.com to set your account password.



Your privacy is important

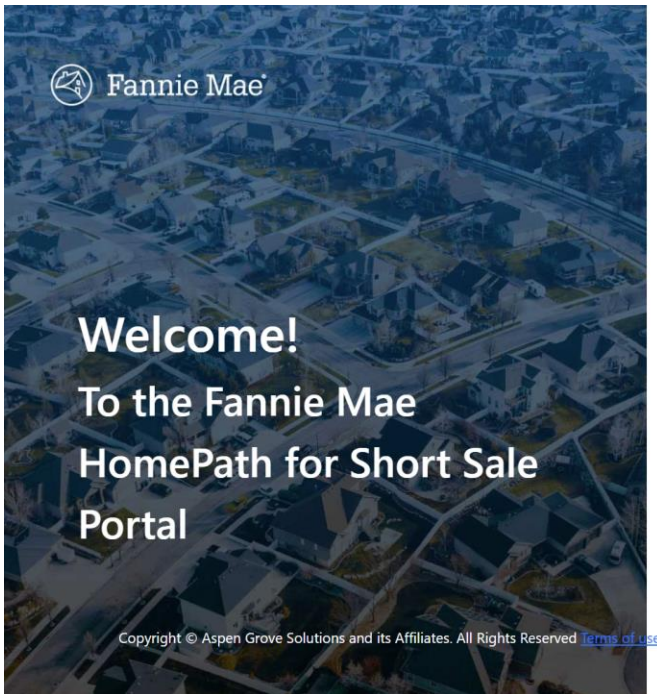
We may send you member updates, invitations to connect, reminders and promotional messages from us and our partners. You can change your preferences at any time

Didn't receive this email? [Send again](#)

Powered by aspengrove

Getting Started

To access the Aspen Grove Portal go to <https://ags.aspengrove.net/Landing/FNMA.aspx> and select 'Agent Login'



Select your login

SERVICER LOG IN



AGENT LOG IN



Don't have an agent account? [Register as an agent](#)

Already registered as an **Aspen** Agent but not connected with FNMA?
Use this [link](#) to log in and get connected.

Powered By  **aspengrove**

Logging In

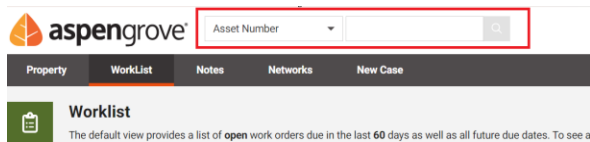
If you have already registered, you can simply enter your username and password to log in. Upon logging into the Aspen Grove portal, you'll be presented with the main screen. The default landing page is the Work List tab, which we'll explore in detail later in this guide. Let's start by familiarizing ourselves with some key features.

Quick Search

The quick search functionality is a powerful tool designed to help you efficiently locate specific properties or loans within the system.

Location and Usage

- The search bar is located at the top of the main screen.



- To use it, follow these steps:
 1. Click on the search bar
 2. Select the appropriate search criteria from the dropdown menu
 3. Enter the relevant information
 4. Press enter or click the search button

Search Options

You can search using various identifiers including:

- Servicer loan number
- Property address
- Case or task number
- Fannie Mae loan number

Example

Let's say you need to find a property using its loan number:

1. Select "servicer loan number" from the dropdown
2. Enter the loan number
3. Initiate the search

The system will immediately redirect you to the specific property associated with that loan number.



Servicer Loan Number P202402605574 Options Help Logout

Property WorkList Notes Networks New Case

Pf090920242, Ashley, Delaware, OH 43003

PROPERTY DETAILS	Fannie Mae	PROPERTY LOCATION	
Servicer Loan Number	PF090920241	Address	Pf090920242
Property Reference	P202402605574	Zip Code	43003
Status	Open	City	Ashley
FM Loan Number		County	Delaware
		State	Ohio

Business Context: This enables agents to quickly access property information, especially when communicating with homeowners or Fannie Mae representatives. It significantly reduces the time spent navigating through multiple screens to find relevant information.

Adding a New Case

As an agent you will have the ability to initiate a new List Price Guidance & Marketing, a Short Sale Offer or a Value Dispute.

Select ‘New Case’ from the top menu and select which task you wish to submit.

Property WorkList Notes Networks New Case

New Case
To initiate a new short sale case, please select the case process

List Price Guidance & Marketing
Real estate professionals who are assisting homeowners interested in pursuing a short sale now have the benefit of requesting list price guidance directly from Fannie Mae before listing the property in the local Multiple Listing Service (MLS) in their area. Once the initial list price guidance is provided, agents may also receive ongoing Active Marketing support from Fannie Mae by providing their MLS Sheet, monthly marketing report, and any other pertinent information related to the marketing of the...

Short Sale Offer
Listing agents representing a homeowner on a Fannie Mae short sale should submit their "highest and best" contract with terms acceptable to the homeowner. If an offer has been received and your client's mortgage is owned by Fannie Mae, you can submit the contract directly to Fannie Mae here. The offer would also need to be submitted to the mortgage servicer to conduct an initial review. Contact the mortgage servicer for guidance.


Value Dispute
If you have data or evidence to support a much lower value, please submit a value dispute so our appraisers can reconcile the value with your information. Be sure to lay out your best case, as we only allow for one value dispute unless we get a new value, or something drastically changes. If you're submitting photos, please make sure they're in color and consolidated to a PDF file. If you have comps, please submit the full MLS sheet of the 3 best ones. If there is insurable damage, be sure to include the...




List Price Guidance & Marketing

Real estate professionals who are assisting homeowners interested in pursuing a short sale now have the benefit of requesting list price guidance directly from Fannie Mae before listing the property in the local Multiple Listing Service (MLS) in their area. Once the initial list price guidance is provided, agents may also receive ongoing Active Marketing support from Fannie Mae by providing their MLS Sheet, monthly marketing report, and any other pertinent information related to the marketing of the property

To initiate a new LPG case hit the Submit option next to that case


**New Case**
To initiate a new short sale case, please select the ca



Submit

List Price Guidance & Marketing

To get started enter, the first line of the address.

**List Price Guidance & Marketing**

?

Submit

Please enter the details of the property you would like a price guidance for

ADDRESS DETAILS

Address *

State *

County *

City *

Zip Code *

Unit

Tool Tip: Entering the Zip Code will automatically populate the State, County and City

Next you will add the **Servicer details**

Servicer Name *


Servicer Loan # *



Tool Tip: Inconsistencies in servicer number entry (e.g., spaces, leading zeros, dashes) may result in duplicate property instances so be extra vigilant that the Servicer Loan # is entered correctly.

As you complete the form certain fields are required fields and you will be unable to save until all required fields have been filled.

PropertyWorkListNotesNetworksNew Case



List Price Guidance & Marketing

Please enter the details of the property you would like a price guidance for

?

Tool Tip: By clicking on the ? icon on the top left this will highlight in red any fields which are required

LISTING INFORMATION

Is The Property Listed? *

Yes No

Have You Already Submitted A Request For List Price Guidance To The Servicer?

Yes No

HOMEOWNER(S)

Primary

First Name *

Last Name *

Secondary

First Name

Last Name

PROPERTY ACCESS

Point Of Contact *

Phone *



This will make it easier for you to identify any missing required fields.

To quickly toggle between form details you can cycle through the form sections by clicking the section you want to review e.g. Property Information, Listing Information, etc.

Filter sections

Property Information

Listing Information

Homeowner(s)

Property Access

Document(s)

Is There A Contract On The Property? *

Yes

No

Agency Type *

Listing Agent

PROPERTY INFORMATION

Occupancy Status *

Owner Occupied

Projected Foreclosure Date

LISTING INFORMATION

Document Section

Required documents are highlighted by a red Asterix and the document counter will also show in red until a document is uploaded. On required documents, the minimum number required is one.

Homeowner Authorization *

0/1-5

There are currently no attachments, click here to upload new attachments

To upload a document select the upload function and then **Add Files**

Upload File(s)

You have no files in your queue.

Only files with the following extensions can be uploaded: .png, .jpg, .jpeg, .tiff, .bmp, .txt, .doc, .docx, .xls, .xlsx, .pdf, .pps, .ppt, .pptx, .rtf, .zip, .rar, .7zip

Maximum size of each individual file: 10 MB

Maximum number of files which can be uploaded in one step: 250.

Click on '+ Add Files' to select files.

Limit of files: 5

+ Add Files

Upload

Clear



Upload File(s)

Preview

Name

Size

Type

Category

Description

Seen By

Test document.docx

0.01 MB

Document

Before

word doc

All

All

Agent

Limit of files: 5

+ Add Files

Upload

Clear

When you are uploading the document you can change the Document Type, Update a description and set visibility rules so the document can be viewed by all stakeholders or just by the agent and Fannie Mae.

Once all required fields have been completed hit ‘Submit Request’. The case will be opened in a status of Initiated and below are the various statuses that the case can cycle through

Status Progression

List Price Guidance cases go through several statuses:

- 1. Initiated: When the agent first raises the case
- 2. Received: Under review by Fannie Mae
- 3. Validated: Upon successful validation by Fannie Mae
- 4. Valuation: If a valuation is required
- 5. Active Marketing: Once fully validated and valuation received

Select a status

Active Marketing

Cancellation Request

Cancel

Once the case is in a status of ‘Active Marketing’, a price has been provided and no further status change is required.

Note a cancellation can be requested at any time:



- The request is sent to Fannie Mae for confirmation
- Upon confirmation, the status changes to "Cancelled"

Short Sale Offer

Listing agents representing a homeowner on a Fannie Mae short sale should submit their "highest and best" contract with terms acceptable to the homeowner. If an offer has been received and your client's mortgage is owned by Fannie Mae, you can submit the contract directly to Fannie Mae. The offer would also need to be submitted to the mortgage servicer to conduct an initial review.

To initiate a new Short Sale Offer, simply select the 'Submit' option under 'New Case'



Submit

Short Sale Offer

Listing agents representing a homeowner on a Fannie Mae short sale should submit their "highest and best" contract with terms acceptable to the homeowner. If an offer has been received and your client's mortgage is owned by Fannie Mae, you can submit the contract directly to Fannie Mae here. The offer would also need to be submitted to the mortgage servicer to conduct an initial review. Contact the mortgage servicer for guidance.

Continue to complete all required fields using the same process as with the LPG case.

Key Features

- Detailed property and offer information
- Offer details and deductions and Estimated Net Sales proceeds
- Negotiation section for counteroffers
- Document attachments
- Activity tab for negotiation history
- Notes functionality for communication

Status Progression

Short Sale Offers go through many statuses, below we've given a flavour for some of them:

1. Initiated



- Validated
- Document and Contract Review
- Approved (with different levels)
- Negotiation – FM Counter, FM counter with contribution, Agent Counter, Agent Counter with Contribution – note agents need to review the FM counter offer and decide to move to Agent Accept or to do a counter offer. They would then move the task to either Negotiation - Agent Counter or Negotiation - Agent Counter with Contribution
- Final Approval or Decline
- Change in Term Requests
- Closed (upon property sale)

Negotiation Process

The negotiation section allows for back-and-forth communication:

- Fannie Mae's counteroffer appears on the left
- Agent's response can be entered on the right
- Status updates reflect the latest offer and its source

Tool Tip : Note that selecting the 'Activities' tab from within the task, you will be able to view the full history of all offers and counter offers on the case starting with the initial offer and then Fannie Mae Counters will be on the left and Agent counters following on the right – so you will see the Initial Offer, then FNMA Counter 1, Agent Counter 1, FNMA Counter 2, Agent Counter 2 and so on.

Short Sale Offer - T0025306232 ⓘ
123 Main Street, Columbus, Franklin, OH 43222 ⓘ ⓘ
Servicer Loan Number 2310 test 1 Investor FNMA
Work Provider FNMA Work Provider Number 545555555

SummaryNotesPhotosAttachmentsContactsActivitiesHistory

Group	Offer type	Initial Offer - EstCloseDate: 10/31/2024	FM Counter 1 - Off/CntrDate: 10/23/20...	Agent Counter 1 - Off/CntrDate: 10/23/20...	FM Counter 2 - Off/CntrDate: 10/23/20...	Agent Counter 2 - Off/CntrDate: 10/23/20...	FM Counter 3 - Off/CntrDate: 10/23/2024 - EstCloseDate: 10/31/2024	Agent Counter 3 - EstCloseDate: 10/31/2024	FM Counter 4 - Off/CntrDate: 10/23/2024 - EstCloseDate: 10/31/2024
Agent Settlement Charges	Sales Price (\$)	259,855	262,333	312,333	222,333	252,333	332,333	376,333	276,333
	Agent Commission (\$)	5,197.1	3	4	5	6	7	8	9
	Agent Commission (%)	2	7,869.99	12,493.32	11,116.65	15,139.98	23,263.31	30,106.64	24,869.9
	Seller's contribution to Closing Costs (\$)	231	231	231	231	231	231	231	231
	Other Seller concessions (\$)	24	24	24	24	24	24	24	24
	Title insurance (\$)	421	421	421	421	421	421	421	421
	Property Taxes (\$)	250	250	250	250	250	250	250	250
	Relocation Incentive (\$)	300	300	300	300	300	300	300	300
	Other expenses (\$)	564	564	564	564	564	564	564	564
	Fee 1 - (Agency) (\$)	127	127	127	127	127	127	127	127
Non Customary Real Estate Fees	Fee 2 - (Appraisal or Survey) (\$)	300	300	300	300	300	300	300	300
	Fee 3 - (CPL/Closing Protection and/or State Policy Fee...	50	50	50	50	50	50	50	50
	Fee 4 - (Discount Points) (\$)	455	455	455	455	455	455	455	455
	Fee 5 - (Document Prep) (\$)	100	100	100	100	100	100	100	100
	Fee 6 - (Home Warranty) (\$)	350	350	350	350	350	350	350	350
	Fee 7 - (Loan Origination) (\$)	475	475	475	475	475	475	475	475
	Fee 8 - (Municipal Code Violation / ECB Liens) (\$)	50	50	50	50	50	50	50	50
	Fee 9 - (Technology) (\$)	120	120	120	120	120	120	120	120
	Fee 10 - (Utility Bills) (\$)	145	145	145	145	145	145	145	145
	Lien 1 (2nd - Tim O'Brien) (\$)	123							
Subordinate Liens	Lien 2 (3rd - Mary O'Brien) (\$)	222							



Communication and Notes


- Add notes and direct them to specific parties
- Set visibility settings (Agent and FNMA only, or all parties including the Servicer)
- Send email notifications along with note creation

Value Dispute Case

The Value Dispute case allows agents to challenge property valuations. If you have data or evidence to support a much lower value, please submit a value dispute so FNMA appraisers can reconcile the value with your information. Be sure to lay out your best case, as FNMA only allow for one value dispute unless we get a new value, or something drastically changes. If you're submitting photos, please make sure they're in color and consolidated to a PDF file. If you have comps, please submit the full MLS sheet of the 3 best ones. If there is insurable damage, be sure to include the claim results (approved or denied) document.

Initiating a Value Dispute

To raise a Value Dispute simply select the 'Submit' option for Value Dispute under 'New Case'

 Submit

Value Dispute

If you have data or evidence to support a much lower value, please submit a value dispute so our appraisers can reconcile the value with your information. Be sure to lay out your best case, as we only allow for one value dispute unless we get a new value, or something drastically changes. If you're submitting photos, please make sure they're in color and consolidated to a PDF file. If you have comps, please submit the full MLS sheet of the 3 best

Status Progression

The value dispute goes through several stages – key steps are listed below:

1. Initiated
2. Received
3. Validated
4. Evaluation Specialist Review
5. Evaluation Specialist Review Completed
6. Sales Rep Acknowledgment
7. Closed




Impact on Other Cases

- A validated Value Dispute case will put open Short Sale Offer or List Price Guidance & Marketing cases on pause while the value of the property is reviewed by a specialist Fannie Mae team.
- Closing a value dispute automatically un-pauses any open list price guidance or short sale offer cases that were put on hold during the dispute.
- The agreed value is updated on open cases and stamped with the date of the value dispute resolution.

Case Details

Within each case, you can view the relevant information:



Value Dispute Case - T0025306065 ⓘ

10830 Villa Lea Ln, Houston, Harris, TX 77071 ⓘ

Servicer Loan Number 9233091043 Investor FNMA

Work Provider FNMA Work Provider Number 5455555555

ⓘ

Save Case/Task

ⓘ

Cancel

Summary

Notes

Photos

Attachments

Contacts

Activities

History

Filter sections ⓘ

Agent's Submission

Documents

AGENT'S SUBMISSION ⓘ

Is There An Existing Contract For This Property On The Short Sales System? ⓘ

☐ Existing contract

☒ No existing contract

Does This Property Have A Foreclosure Sale Date? ⓘ

☐ Yes

☒ No

Projected Foreclosure Date ⓘ

09/25/2024 ⓘ

Recommended Value ⓘ

\$ 520000.00 ⓘ

Agent Comments ⓘ

Work List

The Work List tab is a central feature of the Aspen Grove application and serves as your primary workspace. From here you can quickly get an overview of all your active cases, from all of your management companies, and drill down into the cases for more detail, as required.



Asset Number

Options

Help

Logout

Property

WorkList

Notes

Networks

New Case

Worklist

The default view provides a list of open work orders due in the last 60 days as well as all future due dates. To see all open work orders, use the [Advanced Search](#) option.

Default View

Advanced Search

SAVED SEARCHES

Manage Saved Searches

FILTERS

Search

3 Work Orders Selected

Assign Vendor Person

Change Status

Export to Excel

14 Open Work Orders due in the last 60 days. To see all open work orders, use the [Advanced Search](#) option.

Remember column sequence

<input type="checkbox"/>	Work Order #	Type	Details	Status	Status Date	Asset Number	Due Date	Address	County	City	Opened Date	Person
<input checked="" type="checkbox"/>	T0025306006	Value Dispute Case		Acknowledged by Sales Rep	10/21/2024	10212024last	10/21/2024	5858 Main St, San Francisco, San Francisco, CA 94131	San Francisco	San Francisco	10/21/2024	Elizabeth Ma
<input checked="" type="checkbox"/>	T0025305954	Value Dispute Case		Acknowledged by Sales Rep	10/21/2024	10212024Mon	10/21/2024	7879 San Francisco, Miami-dade, CA 94131	Miami-Dade	San Francisco	10/21/2024	Elizabeth Ma
<input checked="" type="checkbox"/>	T0025306003	Short Sale Offer		Approved by Sales Rep	10/21/2024	10212024last	10/21/2024	5858 Main St, San Francisco, San Francisco, CA 94131	San Francisco	San Francisco	10/21/2024	Collin Zacek

Accessing the Work List

- The Work List is the default landing page when you log in.
- You can also access it by clicking on the "Work List" tab at the top of the screen.
- Your worklist will automatically open on the default view which provides a list of open cases due in the last 60 days as well as all future due dates.

From your default view, you can select multiple cases (or select all) and bulk update the agent assigned, the status of the case, or export the list to Excel if further manipulation is required.

Search

3 Work Orders Selected

Assign Vendor Person

Change Status

Export to Excel

14 Open Work Orders due in the last 60 days. To see all open work orders, use the [Advanced Search](#) option.

Remember column sequence ☐

<input type="checkbox"/>	Work Order #	Type	Details	Status	Status Date	Asset Number	Due Date
<input checked="" type="checkbox"/>	T0025306006	Value Dispute Case		Acknowledged by Sales Rep	10/21/2024	10212024last	10/21/2024
<input checked="" type="checkbox"/>	T0025305954	Value Dispute Case		Acknowledged by Sales Rep	10/21/2024	10212024Mon	10/21/2024
<input checked="" type="checkbox"/>	T0025306003	Short Sale Offer		Approved by Sales Rep	10/21/2024	10212024last	10/21/2024

Advanced Search

The Work List also offers and advanced search with several search filters to help you locate specific information:



Worklist
The default view prov

☐ Default View

☒ Advanced Search

You can filter your search on the following :

Case and Task Types:

- Short Sale Case (with three subcategories):
 - List Price Guidance and Marketing Case
 - Short Sale Offer Case
 - Value Dispute Case

CASE CRITERIA ^

Case/Task

x Short Sale x

Status

Any Status

Case/Task Type

Any Case/Task Type

Short Sale

List Price Guidance & Marketing

Short Sale Offer

Value Dispute Case

- Miscellaneous Tasks (with two subcategories):
 - Follow Up Task – Every 2 weeks, the FNMA sales rep will follow up on the case with the agent to ensure things are progressing.
 - Information Request Task - Actionable by Agent where additional information is needed by Fannie Mae. When information is added, change status to Submit and Save.

CASE CRITERIA ^

Case/Task

x Miscellaneous x

Status

Any Status

Case/Task Type

Any Case/Task Type

Miscellaneous

Follow-Up

Information Request



- 1. **Case/Type :** Short Sale or Miscellaneous
- 2. **Status:** Filter by specific statuses (e.g., Agent Accepted, Approved, Cancellation Request).
- 3. **Location:** Filter by address, state, county, and city.
- 4. **Date Ranges:** Filter by specific time periods.
- 5. **By Agent Person Assigned**
- 6. **By Work Provider.** If you provide searches for multiple work providers who use Aspen Platform then you will see all work assigned by all your work providers in the worklist.

Performing a Search

- 1. Select your desired filters from the options provided.
- 2. Click the search bar at the bottom of the filter section.
- 3. Choose to display open cases, closed cases, or both.
- 4. Click "Search" to execute.

Note: Without any filters, clicking search will return all open cases and tasks.

DATE SEARCH

Status Date

☒ Range ☐ Days

10/28/2024

10/31/2024

Agent Due Date

☒ Range ☐ Days

mm/dd/yyyy

mm/dd/yyyy

VENDOR

Agent Person

×

Tom Merlin

🔍 Search

Clear Search

☆ Save Search

Open

Closed

Both

Assign Age

Fannie Mae Confidential - Restricted

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Grid Display

Search results are displayed in a customizable grid:

- Rearrange columns by dragging and dropping.
- Use "Remember Column Sequence" to save your preferred layout.
- Sort columns by clicking on the header (e.g., by date or Status).
- Click on blue links to open detailed views of cases or tasks.

Export Feature

You can export the grid data to Excel by clicking the export icon, facilitating further analysis or reporting.

110 Case/Task(s) | 110 Open

2 Case/Tasks Selected

Assign Agent Person

Change Status

Export to Excel

Remember column sequence ☐

<input type="checkbox"/>	Case/Task #	Type	Details	Status ↑	Status Date	Servicer Loan Number	Due Date	Address
<input checked="" type="checkbox"/>	T0025305398	Value Dispute Case		Acknowledged by Sales Rep	10/15/2024	1510 test 7	10/15/2024	Test, Columbus, Franklin, OH 43222
<input checked="" type="checkbox"/>	T0025305496	Value Dispute Case		Acknowledged by Sales Rep	10/16/2024	1610 test 2	10/16/2024	Test, Columbus, Franklin, OH 43222

Business Context: The Work List is designed to give agents a comprehensive view of their caseload. It allows for efficient task management and helps prioritize work based on status, type, or urgency. This feature is particularly useful for team leads who need to oversee multiple cases and assign work to team members.

Saved Searches

The Saved Searches feature allows you to save frequently used search criteria for quick access, improving efficiency in your daily tasks.

Creating a Saved Search

1. Set up your search criteria in the Work List
2. Click the "Save Search" button
3. Choose or create a folder to store the search
4. Name your search
5. Optionally, make the search public by selecting the checkbox, this makes the saved search available to everyone within your organization.
6. Click "Save" to finalize



Save Search

×

Select the folder that you want to save the search into.

Folder

Action Needed

FM Counter Offers

Information Request

Folder

Short Sale List Price Guidance & Marketing Cases

Folder

Short Sale Offer Cases

Folder

Short Sale Value Dispute Cases

Name *

Agent Accepted Cases

Public Search

☒ Selecting this option will make the saved search available to all users within your organization

+ New Folder

Save Search

Cancel

Using Saved Searches

- 1. Clear any existing search criteria
- 2. Click on the desired saved search in the side panel
- 3. The search criteria will automatically populate
- 4. Click the "Search" button to execute

Manage Saved Searches

Folder

Action Needed

FM Counter Offers

Information Request

Folder

Short Sale List Price Guidance & Marketing Cases

Short Sale List Price Guidance & Marketing Cases

Folder

Short Sale Offer Cases

The following are some suggested Saved Searches you could add:

FM Counter Offers:



CASE CRITERIA



ADDRESS

Case/Task

x

Short Sale

x

▼

Case/Task Type

x

Short Sale Offer

x

▼

State

Any State

▼

County

Any County

Status

x

Negotiation - FM Counter

x

Negotiation - FM Counter with Contrib

City

Any City

▼

Information Request:

CASE CRITERIA



ADDRESS



Case/Task

x

Short Sale

x

▼

Case/Task Type

Any Case/Task Type

▼

State

Any State

▼

County

Any County

▼

Status

x

Information Request

x

▼

City

Any City

▼

Short Sale List Price Guidance & Marketing Cases:

CASE CRITERIA



ADDRESS



Case/Task

x

Short Sale

x

▼

Case/Task Type

x

List Price Guidance & Marketing

x

▼

State

Any State

▼

County

Any County

▼

Status

Any Status

▼

City

Any City

▼

Short Sale Offer :

CASE CRITERIA



ADDRESS



Case/Task

x

Short Sale

x

▼

Case/Task Type

x

Short Sale Offer

x

▼

State

Any State

▼

County

Any County

▼

Status

Any Status

▼

City

Any City

▼




Business Context: Saved Searches significantly streamline your workflow by providing quick access to frequently used search criteria.

Reviewing Properties

When you select a property from your Work List or through a Quick Search, you'll be presented with a detailed property overview screen.

123 Main Street, Columbus, Franklin, OH 43222



PROPERTY DETAILS

Servicer Loan Number

2310 test 1

Property Reference

P202402606382

Status

Open

FM Loan Number

Other Servicer Name

Loancare

Investor

FNMA

Memo

PROPERTY LOCATION

Address

123 Main Street

Zip Code

43222

City

Columbus

County

Franklin

State

Ohio

[Click here to Find On Map](#)

Processes

Search fields

Short Sale ⓘ

Process Reference PR0001071582

23 Oct 2024

Status: Open

Short Sale | PR0001071582

Status History

View Process

+ Add Case/Task

Initial Offer

259855

Initial Offer Date

10/23/2024

Open Case/Tasks

Closed Case/Tasks

Archived Case/Tasks

All Case/Tasks

Search

Case/Task	Type	Details	Status	Agent Due Date	Person
10025306232	Short Sale - Short Sale Offer	Projected Foreclosure Date 10/31/2024	Validated	10/26/2024	Collin Zacek

Property Overview Layout

The screen is divided into several key sections:

- **Left Side:** Displays a picture of the property
- **Top:** Shows essential details such as:
 - Address
 - Servicer loan number
 - Servicer name
 - Property reference (unique to the application)
 - Property status
 - Fannie Mae loan number
 - Investor information

Key Sections

1. **Short Sale Process:** Located in the lower left portion of the screen.



Short Sale ⓘ

Process Reference PR0001071582

23 Oct 2024

Status Open

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2. **Key Information:** To the right of the short sale process, displaying critical data points surfaced from the process.

Short Sale | PR0001071582

Status History

View Process

+ Add Case/Task

Initial Offer259855Initial Offer Date10/23/2024

3. **Case and Task Management:** At the bottom of the screen, manage all cases and tasks related to the property:

- Open Cases
- Closed Cases
- All Cases and Tasks

Open Case/Tasks




Closed Case/Tasks

All Case/Tasks

Items per page

25

Search

Case/Task	Type	Details	Status	Agent Due Date	Person
 T0025322049	Short Sale - List Price Guidance & Marketing	Agency Type Listing Agent, Is The Property Listed? No, Occupancy Status Owner Occupied	Received	01/24/2025	Hillary Johnson
 T0025328682	Short Sale - Short Sale Offer	Current Estimated Completed Date 04/21/2025	Negotiation - Agent Counter	02/11/2025	Collin Zacek
 T0025338575	Short Sale - Short Sale Offer	Current Estimated Completed Date 03/19/2025, Projected Foreclosure Date 03/05/2025	Received	03/22/2025	Hillary Johnson

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Detailed Process Information

To access more in-depth information:

1. Click "View Process" to see all stored Fannie Mae information.
2. Review key indicators, important dates, and property details.
3. Access valuation contact information when available.



Valuation Data

When a valuation is completed and returned to Fannie Mae:

- Data is uploaded to the process screens
- Information is directly added to any open case on the property

Notes Management

The Notes functionality allows you to review and send notes across all properties and cases.

Notes can be found at 3 levels:

1. Organisation Notes – allows you to view only all notes across all properties and cases
2. Property Level Notes - allows you to view notes specific to that property
3. Case and Task Notes – allows you to view and add notes specify to that case or task

Organizational Notes

The screenshot displays the Aspen Grove application interface. At the top, the Aspen Grove logo is on the left, and navigation links for 'Options', 'Help', and 'Logout' are on the right. Below the header is a dark navigation bar with tabs for 'Property', 'WorkList', 'Notes' (which is highlighted), 'Networks', and 'New Case'. The main content area is titled 'Note List' and includes a sub-header: 'Use the filters provided to search for notes across your portfolio.' Below this is a 'SEARCH FILTERS' section with a collapse icon. The filters include: 'Note Type *' with a dropdown menu set to 'All'; 'WorkList Type' with a dropdown menu set to 'Organization'; 'From Date *' with a date input field set to '09/23/2024'; and 'To Date *' with a date input field set to '10/23/2024'. There are also buttons for 'Search Notes' and 'Reset filters', and a checkbox for 'Include Archived Notes'.

Accessing Organization Notes

- Click on the Notes tab at the top of the interface
- Select the Note Type you wish to view
- Select from Organization, Property or Case notes

Searching and Displaying Notes

1. Adjust the date range as needed (default is one month)



2. Click the "search option" button

Note Information

Each note displays:

- Read/Unread status
- Attachment indicator
- Date of the note
- Associated property or case

Interacting with Notes

- Click on a note to view its full content
- Download attachments directly from the Notes tab

Important Considerations

- New notes cannot be added from this Notes tab
- Create notes within the specific case they relate to

Business Context: The centralized Notes feature enhances communication and information sharing across your team. It allows you to quickly review recent updates or communications related to multiple properties or cases, improving overall workflow efficiency.

Note List

Use the filters provided to search for notes across your portfolio.

SEARCH FILTERS

Note Type *

All

WorkList Type

Property

From Date *

09/23/2024

To Date *

10/23/2024

Search Notes

Reset filters

☐ Include Archived Notes

Rows per page25

	Date/Time	From	Subject	Note	Attached To	Seen By	I...
<input type="checkbox"/>	09/23/2024 6:51:45		09162024 ...	all	Property	All	
<input type="checkbox"/>	09/23/2024 6:51:06		09162024 ...	prop	Property	Agent	



Case and Task Notes

- Open the relevant case or task
- Select Notes Tab to see notes specific to that case or task
- Here you can view or add notes for that case on task
- When Adding notes, subject will be prepopulated with the Servicer Loan Number, the property address, Task/Case Number and Task/Case name

Add a new Note

X

To

john@test.com

Enter an email or start typing to select from the list

Subject *

2310 Test - Test 123, Columbus, Franklin, OH 43222 - T0025306392 - Short Sale Offer

Priority *

High

Note *

B I S U P H1 H2 H3 H4 H5 H6 ...

Hi John,

Save Note

Cancel

You will be able to view any notes sent or received when you select the Notes tab



Short Sale Offer - T0025306392 ⓘ

📍 Test 123, Columbus, Franklin, OH 43222 🔒📅

Servicer Loan Number 2310 Test **Investor** FNMA

Work Provider FNMA

Work Provider Number 5455555555

Close

Summary **Notes** Photos Attachments Contacts Activities History

Note Type

All ▼

Search

Search 🔍

Priority

● All ▼

Include System Notes

☐

+

1 Note(s)

Date/Time	To	From	Note	Seen By
<input type="checkbox"/> 10/24/2024 7:43:39	john@test.com	merlin@test.com	2310 Test - Test 123, Columbus, Franklin, OH 43222 - T0025306392 - Short Sale Offer Hi John, I have some important feedback from the seller. See below	All

Documents and Attachments

- Documents can be located at the case/task

Case/Task Attachments

- Open Case/Task
- Select Attachments Tab



Short Sale Offer - T0025306392 ⓘ

📍 Test 123, Columbus, Franklin, OH 43222 🔒📅

Servicer Loan Number 2310 Test **Investor** FNMA

Work Provider FNMA

Work Provider Number 5455555555

Close

Summary Notes Photos **Attachments** Contacts Activities History

Search 🔍

+ Upload Attachment(s)

5 Attachment(s)

<input type="checkbox"/>	Attachment Name	Description ↑	Date Uploaded	Attachment Type	Seen By
<input type="checkbox"/>	demo house.jpg	Before-	10/23/2024	Document	All
<input type="checkbox"/>	demo house.jpg	Before-	10/23/2024	Document	All
<input type="checkbox"/>	demo house.jpg	Before-	10/23/2024	Document	All
<input type="checkbox"/>	demo house.jpg	Before-	10/23/2024	Document	All
<input type="checkbox"/>	demo house.jpg	Before-	10/23/2024	Document	All

Items per page: 25 ▼ 1 – 5 of 5 < >



You can click on the attachment to view or use the download button on the left-hand side to download.

Case Assignment

The case assignment feature allows you to assign cases to specific team members, enhancing workflow management and accountability.

Assigning a Case

- 1. Locate the case you want to assign in your Work List
- 2. Use the dropdown list to select the appropriate team member
 - Only users with access to your portal will be displayed
 - From the worklist you can assign the case or cases using the ‘Assign agent Person’ functionality

1 Case/Task(s) | 1 Open


1 Case/Tasks Selected

Assign Agent Person

Change Status

Export to Excel

Remember column sequence ☐

<input type="checkbox"/>	Case/Task #	Type	Details	Status	Status Date	Servicer Loan Number	Due Date	Address
<input checked="" type="checkbox"/>	 T0025305289	Short Sale Offer	Occupancy status Owner Occupied	Approved	10/14/2024	2020	10/14/2024	21 Greencrest Drive, Kingwood, Harris, TX 77339

Within the task you can manually assign the case using the Agent Person dropdown

Summary

Notes

Photos

CASE DETAILS

Status

Counter to Sales Rep

Status Reason

Test "Counter to Sales Rep" director response

ASSIGNMENT TYPE

Agent Person

Select an agent person

Person

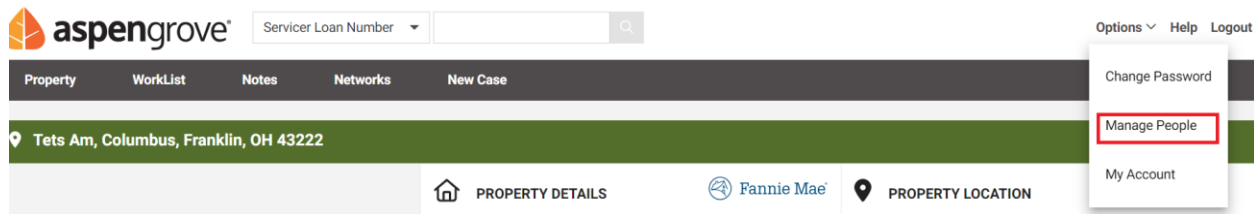
Hillary Jol




Adding multiple agents

If you work with a colleague on a listing you can add them to the Aspen portal .

Select Options, Manage People from the top left menu



To add a New Person, select the  icon.

Complete their details making sure you make the login active and if you want them to be able to log in, select the tick box for ‘Can this person login’?

Select what role you wish them to be associated with and then ‘Save Person’

They will be added to you list of people – you can deactivate a login at any time by deselecting the ‘Active’ and Login boxes.



Add Person
Please enter the details of the Person you would like to add

Save PersonCancel

Add a New Person to your Organization

1 PERSON DETAILS - John Lowe

2 ROLES - 1 role(s) selected

☐ Aspen iProperty Role

☒ FNMA Short Sale Role

Description

Aspen iProperty Fannie Mae Short Sale Portal Role - This role grants access to the Fannie Mae Short Sale Portal.

SERVICES AND PERMISSIONS

Aspen iProperty - Fannie Mae Portal

☒ Access the Fannie Mae Short Sale Portal

Back

Save Person

Cancel

Filtering Assigned Cases

- Use column filters on the worklist to sort and group cases by assigned individual
- Include the assigned person in your search criteria to focus on specific cases

Important Considerations

- Some cases may remain unassigned, until a team member has been assigned
- When searching or filtering, account for unassigned cases to ensure a comprehensive view