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# Fidelity Attorney Roundtable

## Meeting Notes

The Fidelity Attorney Roundtable held a teleconference on **Monday, September 17, 2007 at 1:00 PM EST**. The attorney members of the Roundtable include the following firms:

**Barrett Burke Wilson Castle Daffin & Frappier [TX]**  
**Bierman, Geesing & Ward [DC,MD,VA] – AFN Designated**  
**Castle Meinhold & Stawiarski [CO] – USFN Designated**  
**Fein Such Law Group [NJ]**  
**Hughes Watters & Askanase [TX]**  
**McCabe Weisberg & Conway [NY,NJ,PA]**  
**McCarthy & Holthus [CA]**  
**Shapiro & Sutherland [OR]**

**The next meeting will be held via teleconference on Monday, October 15, 2007 at 1:00 PM EST**. If you have any comments or items of concern you would like added to the agenda for discussion, please contact any member of the Attorney Roundtable who you are comfortable reaching out to, or contact FNFS Attorney Relations at [AttyFeedback@FNFS.net](mailto:AttyFeedback@FNFS.net).



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**Attorney Roundtable Meeting**  
**Monday, September 17, 2007**  
**1:00 PM – 2:00 PM EST**

### **TOPICS OF DISCUSSION**

**TOP 10 OPPORTUNITIES FOR IMPROVEMENT** – Members of the roundtable submitted topics for the top 10 areas for FNFS improvement.

- This list was reviewed and topics that can be immediately addressed or responded to were removed from the list and will be addressed. All other topics were submitted to the roundtable for review.
- FNFS would like the roundtable members to review the list and select their firm's top 10 items.
- Roundtable members agreed to send their top 10 items to Lindsey Lesch by 9/24/07.
- FNFS will review the items and respond back to the roundtable firms by 10/1/07.

### **STATUS UPDATES**

**VENDOR/CASE FILE NUMBER** – The case file number is assigned to carry over to the notes section and intercoms for firm references. Some firms would also like it to carry over to quotes for fees & costs.

- Kay Schinker and Caren Castile were to solicit additional feedback on this item to see if it would be helpful to firms. The feedback that Kay received was that many firms rely on this number for reference in their systems.
- This item was added to the Top 10 list for prioritization.

**FNMA TITLE DIRECTIVE** – During the 8/06/07 meeting, Caren Castle raised a concern about the recent directive from FNMA regarding title in 20 states. The directive was effective 8/01/07, but was suspended until 9/01/07.

- Bill Newland has the list of states that this affected and will pass this along to Scott Barnes.
- Scott said that he will review the list and that FNFS may consider scoring from "Title Received-To-First Action."

**ELIGIBLE HOLDS/ISSUES INTERCOM LIST** – FNFS solicited feedback from the roundtable firms about creating a function within PM to allow the originator of a hold/issue the option to receive or not receive a notification when the hold/issue has been closed.

- FNFS Operations will discuss this issue further internally to decide which holds/issues should have the option to disable the automatic notification function when the hold/issue is closed. There may be some holds/issues that should always have this notification sent.
- Once the list of hold/issue types has been decided upon, this will have to go through the Process Management user group for prioritization on their list of enhancements.



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**APR PROJECT LIST – TOP 5 PRIORITY**

- Below is a list of the Top 5 prioritized items that our reporting team is working on.
- Most of the items currently on the Top 5 are close to completion, so we will discuss the prioritization of other APR projects on our next roundtable call.
- Before these items are put into effect, FNFS will provide updated guides and explanations for the roundtable to review.
- A network announcement will be sent before the changes are effective on the APR.

Priority Items	Description	Projected ETA *
BK MFR Stage/Weighting Changes	As a result of the MFR stage changes the weighting will be modified on the BK scorecard.	10/15/07
Initial Stage Measurement to "File Referred"	Change all FC/BK stages that currently hinge off of "File Received" to start with "File Referred"	10/15/07
BK APR – Chapter 7 vs. Chapter 13 Distribution	Illustrate distribution of Chapter 7 and Chapter 13 volume in State Attorney Section	10/15/07
Upstate/Downstate New York	Separate Upstate and Downstate counties in NY for APR purposes	Q4
Inherited File Stage Update	Stage completions and activities in the APR when the activity of both the starting/ending events of the stage occurs after the date of transfer.	10/15/07

\*The projected ETA is subject to change.

**OPEN DISCUSSION**

**MATRIX FOR CLIENTS THAT HANDLE TITLE ISSUES IN-HOUSE** [Kelly Sutherland]

- Kelly Sutherland (Shapiro & Sutherland) asked for a matrix as to which clients handle their title issues in-house and which have the attorneys handle.
- Tara Engle stated she could provide a list of the clients that handle these issues in-house.

**HOMEQ DOCUMENT DELAYS** [Dave Owen]

- Dave Owen (McCarthy Holthus) stated that his firm is having a problem getting signed assignments and declarations on HomeEq files, which is creating timeline delays.
- Chris Hymer stated that HomeEq took FNFS' signing authority away when they merged with Barclays, but may again be interested in increasing this authority with FNFS.
- Dave asked if FNFS was willing to accommodate this issue in the APR. Chris stated that we don't know if we will apply any carve-out at this time. We supply the information to the client so we can fix the problem.
- Bill Newland and Chris stated they would contact Mike Perry to discuss the signing authority issue.
- Mike Vestal (Barrett Burke Wilson Castle Daffin & Frappier) suggested using the Client Directed Delay, but FNFS stated that this would only be a work-around and not a resolution. This is also not what that hold was designed for.



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**DELIVERABLES**

<b>Item Description</b>	<b>Active Tasks</b>	<b>Tasks Assigned to</b>	<b>Due Date</b>
<b>Top 10 Opportunities for Improvement</b>	Roundtable members will send their top 10 items to Lindsey Lesch by 9/24/07.	Roundtable Members	9/24/07
<b>Top 10 Opportunities for Improvement</b>	FNFS will review the top 10 items and respond back to the roundtable firms by 10/1/07.	Lindsey Lesch Matt Rogina	10/1/07
<b>FNMA Title Directive</b>	Bill Newland and Scott to further review and consider scoring from "Title Received-To-First Action."	Bill Newland Scott Barnes	10/1/07
<b>Eligible Holds/Issues Intercom List</b>	Lindsey to schedule meeting for FNFS Operations to discuss the Eligible Holds/Issues Intercom List issue and decide which holds /issues should have the option to disable the automatic notification function when the hold/issue is closed. There may be some holds/issues that should always have this notification sent.	Lindsey Lesch	10/1/07
<b>APR Project List – Top 5 Priority</b>	FNFS will provide updated guides and explanations for APR changes to the roundtable to review and create a network announcement	Chris Hymer Lindsey Lesch	10/8/07
<b>Matrix for clients that handle title issues in-house</b>	Tara Engle will provide a list of the clients that handle title issues in-house.	Tara Engle	10/1/07
<b>HomEq Document Delays</b>	Bill Newland and Chris Hymer will contact Mike Perry at HomEq to discuss the signing authority issue.	Bill Newland Chris Hymer	10/1/07