Dara Default

Release 25.2

March 8, 2025

By SAGENT

Table of Contents

Release Summary

The following areas are impacted with this release.

Product	Description
Dara Claims	Claims functionality within Dara and with Claims partners

Please submit any questions or findings to Sagent at https://sagentsupport.service-now.com/csm.

Dara Claims and Dara Loss Mitigation are add-on features. If interested, please contact your Sagent Customer Success Manager.

Claims

Feature 540462	Update Configuration Reports with New Claim Controlling Actions as Descriptions
Description	This feature improves usability of the Configuration Summary report to display the **Controlling Action Identifier** value as **Description** instead of an internal code number when the **Controlling Action** is selected as Claim Subtype or Claim Status. This helps the user to understand which claim subtype is being used as the controlling action identifier value. When the user configures any Document template or Task Template that is triggered by Claim Subtype or Claim Status, the Claim Subtype Description on the Controlling Action Identifier column will display on the Canned Report screen. **Configuration Summary>Document>Document Details** Following are the Claim Subtype values displayed as the description on the Controlling Action Identifier column: ○ Foreclosure ○ DIL ○ Single Family Loan Sale ○ Indian Lands ○ Hawaiian Homelands ○ Supplemental ○ 1st Chance

	○ 2nd Chance ○ Pre-Foreclosure Sale ○ Special Forbearance ○ Loan Modification ○ FHA-HAMP Loan Modification ○ National Emergency Partial Claim ○ Natural Disaster Partial Claim ○ HAMP Partial Claim ○ National Emergency Partial Claim with Mod ○ Natural Disaster Partial Claim with Mod ○ COVID Partial Claim with Mod ○ COVID Partial Claim with Payment Supplement ○ Foreclosure Sale ○ 3rd Party Sale ○ Settled at FCL ○ Settled at DIL **Configuration Summary>Task>Task Details** Following are the Claim Status values displayed as the description on the Controlling Action Identifier column: ○ Claim Assignment ○ Claim Build ○ Submitted to QA ○ QA Review ○ Pending Corrections ○ Claim Filed ○ Pending Agency Receipt ○ Pending AOP ○ Appeal Pending Payment ○ Suspense Pending ○ Active Claim Block ○ Pending Appeal Review ○ Withdrawn Pending Re-Submission ○ Withdrawn Pending Filing ○ Pending Reconciliation Assignment ○ Pending Reconciliation Completion ○ Pending Reconciliation Approval ○ Claim Reconciliation Complete ○ No Claim to File ○ Funds Received ○ Denied Claim

Testing Considerations	**Negative Testing:** 1. Configure Document Tracking Template for a USDA Non-Conveyance Pre-foreclosure to trigger from a Claim Subtype. 2. Controlling Action equals Claim Subtype. 3. Controlling Action ID equals Pre-foreclosure. 4. Run the Configuration/Documents/Documents Detail Report. 5. For the USDA Non-Conveyance Pre-foreclosure template on the report, Controlling Action column will display Claim Subtype, and the Controlling Action ID column will display a numeric code. **Positive Testing:** 1. Configure Document Tracking Template for a USDA Non-Conveyance Pre-foreclosure to trigger from a Claim Subtype. 2. Controlling Action equals Claim Subtype. 3. Controlling Action ID equals Pre-foreclosure. 4. Run the Configuration/Documents/Documents Detail Report. 5. For the USDA Non-Conveyance Pre-foreclosure template on the report, Controlling Action column will display Claim Subtype and the Controlling Action ID column will display Pre-foreclosure.

Feature 536725	Loss Analysis: User Interface Enhancements and Customization
Description	This feature provides the following enhancements to the **Loss Analysis>Loss Attribution tab.** The changes will facilitate: – Accurate loan balancing by allowing users to edit or update all applicable fields in the Loss Attribution table - except for validation or calculated fields – Mass deletion of expense line items - except Total Loss and Total UPB – Display of the Total UPB Loss and Total Interest Loss in the Shortfall Assessment Grid – Updating of the Expense and Category Descriptions **Loss Attribution editable fields are**: ○ Paid Date ○ Service Completed ○ Invoice No. ○ Description ○ Detail ○ Paid ○ Claimed

	Administrators: On the Utility>Preferences tab, administrators can turn ON or OFF these two functionalities: – Loss Mit Shortfall – Edit If the administrator selects the On button on the Preference tab, the user will be able to edit the fields in the Loss Attribution - Shortfall Assessment section. – Loss Mit Shortfall – Delete If the administrator selects the On button on the Preferences tab, the user will be able to delete expense items beyond the system's allowance for duplicates. Users will be able to select all items in the grid with one click. Or they can select the applicable line items and use the delete button to delete specific entries. When either option is set to Off, then users will not be able to edit or delete fields in the Loss Attribution - Shortfall Assessment section. The **Total UPB Loss** and **Total Interest Loss** on the Loss Attribution - Shortfall Assessment Grid will now display any value (zero, negative and greater than zero value). The **Expense Description** will be updated with information from the Recovered Details when a change has been made to the Expense Description for an Advance. The Category Description is already being updated in this scenario. The Category Description and Expense Description will be updated correctly when exporting data into the Loss Analysis grid.
Testing Considerations	**Configuration Needed:** 1. Client Admin accessibility is needed to turn on the edit or delete option in the Loss Attribution Shortfall table. 2. Access Utilities > Preference. 3. Select the Account Name that you would like to grant access to, such as LMT. 4. To enable the Loss Attribution Shortfall - Delete function, select the radio button under the On column. 5. To enable the Loss Attribution Shortfall - Edit function, select the radio button under the On column. **Functional Testing:** 1. Verify that all applicable fields in the Loss Attribution table are editable. 2. Ensure that the validations for Credits and Reimbursements are enforced correctly. Confirm that calculated fields (Recovered, Shortfall, Attributed) are computed accurately.

	Mass Deletion Testing: 1. Test the "Select All" functionality to ensure it selects all items on the grid. 2. Verify that the delete button works correctly for both single and multiple line-item deletions. **Configuration Testing:** 1. Check that the admin user can enable or disable the edit/update functionality and mass deletion through the preference settings. 2. Ensure that the configuration changes are reflected correctly in the Loss Attribution table. **Display Testing:** Verify that the Total UPB Loss and Total Interest Loss are displayed correctly in the Shortfall Assessment Grid with the appropriate value. **Data Update Testing:** 1. Confirm that the Expense Description is updated correctly with the details sent in the Recovered Details. 2. Ensure that the Category and Description are updated correctly when exporting data into the Loss Analysis grid.

Feature 528054	Support MI Claims
Description	As a result of this feature, the Claims Management system will be updated automatically with the Servicer MI Code from the Reference Lookup screen.
Testing Considerations	**Negative Testing:** **Positive Testing:** Configuration Required: Reference Lookup Setup - Contact Client Administrator 1. Servicer Code Automation: Verify that the Servicer Code is sent automatically to the Claims Management system and that the Mortgage Insurance Payee Name held in their administration is sent to the Insurer. 2. Reference Lookup Setup: In the reference lookup table, verify the Insurer Name is correctly cross-referenced, and the Servicer Code is accurate. a. Administration > Configuration Builder > Reference Lookup Setup b. Select 'Interface Transaction Type' as ALL and 'Lookup Type' as MI Company ID c. Click 'Search' and the records input into the table will provide the corresponding MI Tempo Codes to Service Code 3. Once the claim is referred, the system will use the MI Company ID table to send the 'Service Code' to the Claims Management system in which will be used to send the MI Company Name to insurers.