

AUTOMOD

Quick Reference Guide: External



What is AutoMod?

Automod is the process of converting doc mod memos into structured – digital data

Digital mods have two components: a Modification List and Modification Cards

Modification List- each modification is represented in a list - use this to manage modifications

Deal Documents > Non-Delegated Doc Mod Memo Deal Name.docx
Deal Document Mod Memos

4 items • Sorted by Deal Document Mod Memo Name • Updated a few seconds ago

	Deal Document M...	Loan Doc/Form Number & ...	Section Reference	Non-Delegated Category	Document Ver...	Last Modified Date	
1	DDMM-125727	TEST	TEST	Business/Credit AND Legal Approval		3/4/2026 2:14 PM	
2	DDMM-125728	TEST	TEST	Business/Credit AND Legal Approval		3/4/2026 2:13 PM	
3	DDMM-125729	FORM NUMBER HERE	SECTION REFERENCE HERE	Business/Credit AND Legal Approval	2	3/4/2026 2:19 PM	
4	DDMM-125736	FORM NUMBER HERE	SECTION REFERENCE HERE	Business/Credit AND Legal Approval	3	3/6/2026 12:29 PM	

Modification Cards – details of the modification request

Deal Document Mod Memos
DDMM-125729

DETAILS RELATED

Document Modification Memo (Non-Delegated)

Deal Document Mod Memo Name
DDMM-125729

Loan Doc/Form Number & Publication Date
FORM NUMBER HERE

Project Name
Deal Name / BROOKFIELD, WI

Delegation Type
Non-Delegated

Created By
DunGaimley, Support, 3/4/2026 2:19 PM

Last Modified By
DunGaimley, Support, 3/4/2026 2:19 PM

Deal Document
Non-Delegated Doc Mod Memo Deal Name.docx

Document Version
2

Deal Name
Deal Name

Deal Document Submission Date
3/4/2026

Collaborate here!

Modification Cards include a Chatter feature – use this to connect with Fannie Mae on that modification

Uploading Memos

Uploading the **initial Memo** in AutoMod follows the same process you use now:

- From the **Deal page**, click on the Deal Documents tab.
- Click the **Upload Files** button to select the Non-Delegated Document Modification Memo File.
- For Document Category, select **Legal** from the dropdown menu.
- For Document Type, select **Loan Document Modification Memo** from the dropdown menu.
- Select the Delegation Type as **Non-Delegated**.
- Complete the Counsel information.

REMINDER: Documents must comply with the naming conventions as shown in the Memo instructions

Accessing Modifications

1

From the Deal Page, navigate to Deal Documents tab, select the initial Memo.

2

From the Document page, select the Related tab

Deal Document
Non-Delegated Doc Mod Memo Deal Name.docx

DETAILS **RELATED**

Document Name	Version
Non-Delegated Doc Mod Memo Deal Name.docx	3

Deal

[Deal Name](#)

Document Category

Legal

Document Type

Loan Document Modification Memo

Delegation Type

Non-Delegated

EIA Modification

✓

Lender Counsel

Other Lender Counsel

TEST

Assigned Attorney

TEST

Show Other Lender Counsel Field

✓

Government Agency

Created By

[Shakeout User1](#), 3/6/2026 12:33 PM

Last Modified By

[Shakeout User1](#), 3/6/2026 12:30 PM

Accessing Modifications

(continued)

- 3 After clicking the Related tab, you'll be in the Modification List view as shown below.

Deal Document
Non-Delegated Doc Mod Memo Deal Name.docx

DETAILS RELATED

Deal Document Mod Memos (2)

Deal Document Mod Me...	Loan Doc/Form Number & ...	Section Reference	Non-Delegated Category
DDMM-125727	TEST	TEST	Business/Credit AND Legal...
DDMM-125728	TEST	TEST	Business/Credit AND Legal...

View All

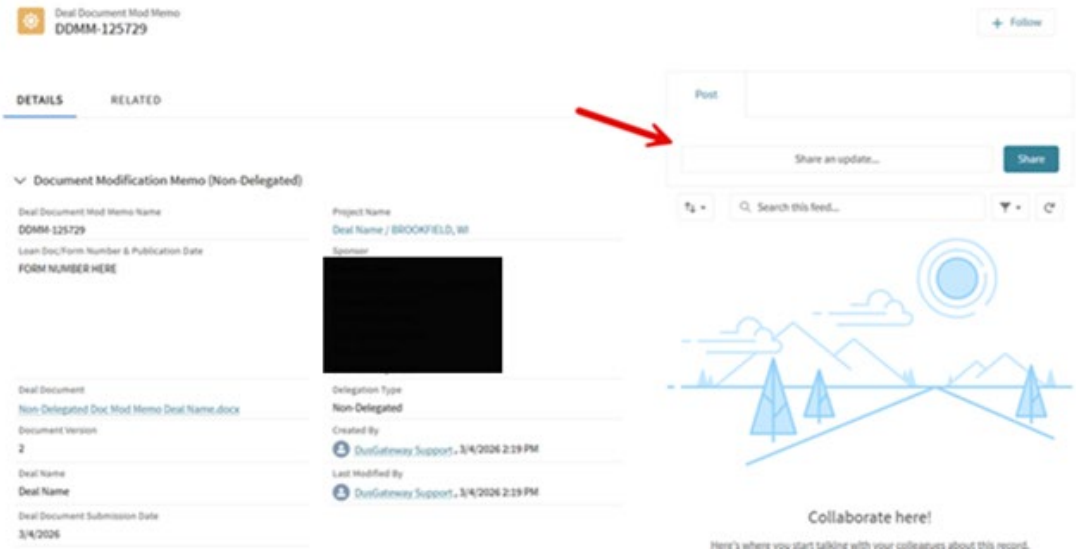
- 4 Click the DDMM link to open the Modification Card and view the modification request.

REMINDER: The area outlined in red is the Modification List, use it as a visual tool to manage modifications

Accessing Modifications (continued)

5

Navigate within the Modification Card as needed.



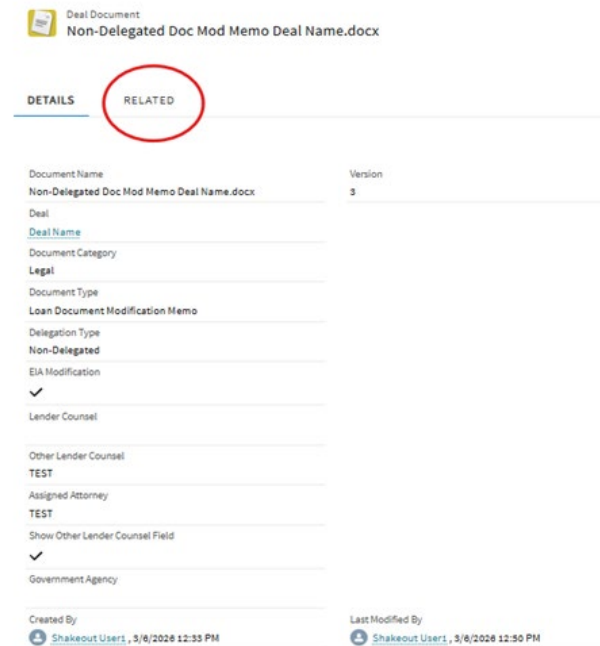
REMINDER: Use the chatter feature in the Modification Card to connect with Fannie Mae on that specific modification

Memo Versions

Any Memos submitted after the initial Memo must be **uploaded as a version** AND comply with the naming conventions.

To upload versions:

- 1 Navigate to Deal Documents, select the initial Memo
- 2 From the Document page, select the Related tab



The screenshot shows a document page for a 'Deal Document' titled 'Non-Delegated Doc Mod Memo Deal Name.docx'. The 'RELATED' tab is selected and circled in red. Below the tabs, there is a table with two columns: 'Document Name' and 'Version'. The table contains one row with the document name and version number '3'. Below the table, there are several fields for document details, including 'Deal Name', 'Document Category', 'Legal', 'Document Type', 'Delegation Type', 'EIA Modification', 'Lender Counsel', 'Other Lender Counsel', 'Assigned Attorney', 'Show Other Lender Counsel Field', and 'Government Agency'. At the bottom, there are fields for 'Created By' and 'Last Modified By', both showing 'Shakeout Users' on 3/8/2026 at 12:33 PM and 12:30 PM respectively.

Document Name	Version
Non-Delegated Doc Mod Memo Deal Name.docx	3

Memo Versions

(continued)




3

Next click on the initial uploaded Memo

Deal Document
Non-Delegated Doc Mod Memo Deal Name.docx

DETAILS RELATED


Deal Document Mod Memos (3)

Deal Document Mod Me...	Loan Doc/Form Number & ...	Section Reference	Non-Delegated Category
DDMM-125727	TEST	TEST	Business/Credit AND Legal... 
DDMM-125728	TEST	TEST	Business/Credit AND Legal... 
DDMM-125729	FORM NUMBER HERE	SECTION REFERENCE HERE	Business/Credit AND Legal... 

[View All](#)

Files (1)

[Add Files](#)

 Non-Delegated Doc Mod Memo Deal Name
Mar 4, 2026 • 108KB • docx

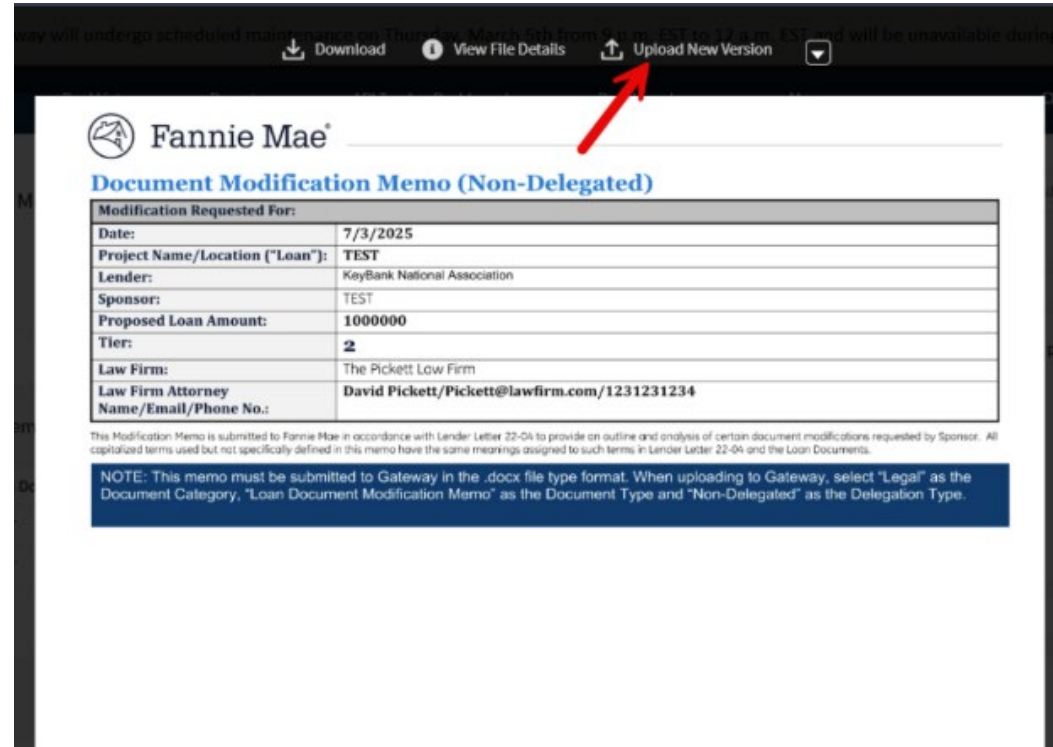
[View All](#)

Memo Versions

(continued)

4

Select Upload New Version



The screenshot shows a web interface for Fannie Mae. At the top, there is a navigation bar with icons for 'Download', 'View File Details', 'Upload New Version', and a dropdown arrow. A red arrow points to the 'Upload New Version' button. Below the navigation bar is the Fannie Mae logo and the title 'Document Modification Memo (Non-Delegated)'. A table titled 'Modification Requested For:' contains the following information:

Date:	7/3/2025
Project Name/Location ("Loan"):	TEST
Lender:	KeyBank National Association
Sponsor:	TEST
Proposed Loan Amount:	1000000
Tier:	2
Law Firm:	The Pickett Law Firm
Law Firm Attorney Name/Email/Phone No.:	David Pickett/Pickett@lawfirm.com/1231231234

Below the table, there is a note: 'This Modification Memo is submitted to Fannie Mae in accordance with Lender Letter 22-04 to provide an outline and analysis of certain document modifications requested by Sponsor. All capitalized terms used but not specifically defined in this memo have the same meanings assigned to such terms in Lender Letter 22-04 and the Loan Documents.'

A blue box contains the following text: 'NOTE: This memo must be submitted to Gateway in the .docx file type format. When uploading to Gateway, select "Legal" as the Document Category, "Loan Document Modification Memo" as the Document Type and "Non-Delegated" as the Delegation Type.'

Memo Versions

(continued)

ALTERNATE PROCESS: UPLOADING VERSIONS

You may also upload a new Memo version to a Document Modification file by:

- opening the Deal Document, click on the Related tab, and click on the View All button in the Files section
- click on the dropdown next to the file and select Upload New Version
- to view previous versions, click on View File Details in the same dropdown.

Decisioned Memos

1

When the Modification Memo has been decisioned, the **Lender Contact and Additional Lender Contacts listed in Gateway** will receive an email notification that the Memo is decisioned and can be downloaded



Dear Shakeout User1,

The non-delegated document modification memo is decisioned and ready for you to download. Please [Click Here](#) to navigate to the uploaded memo and click on "Download Decisions".

2

Click the link in the email. Then click **Download Decisions** button to view the decisioned memo.

A screenshot of the DUS Gateway web application. The top navigation bar includes "DUS Gateway", "Home", "Deal List", "Reports", "API Tracker Dashboard", "Dashboard", and "More". Below the navigation bar, there is a document card for "Non-Delegated Doc Mod Memo Deal Name.docx". The card has a "Deal Document" icon and a "Download Decisions" button highlighted with a red rectangle. To the right of the document card is a search bar and a "Search this feed..." input. Below the search bar, there is a post from "Shakeout User1 (PennyMac Corp.)" posted 31m ago, showing a thumbnail of the document and a "Non-Deleg..." dropdown menu. At the bottom of the post, there are "Like" and "Comment" buttons, and a "Write a comment..." input field. The "DETAILS" tab is selected, showing a table with the following information:

Document Name	Version
Non-Delegated Doc Mod Memo Deal Name.docx	2

Deal Name

Document Category: Legal

Document Type: Loan Document Modification Memo

Delegation Type: Non-Delegated

Decisioned Memos




(continued)



3


The decisioned memo is stored under the “Files” section. You may download and distribute it to your counsel per your current practices.

DETAILS

RELATED

Deal Document Mod Memos (3)			
Deal Document Mod Me...	Loan Doc/Form Number & ...	Section Reference	Non-Delegated Category
DDMM-125727	TEST	TEST	Business/Credit AND Legal... 
DDMM-125728	TEST	TEST	Business/Credit AND Legal... 
DDMM-125729	FORM NUMBER HERE	SECTION REFERENCE HERE	Business/Credit AND Legal... 
View All			

Files (2)		Add Files
 208548_Deal_Doc_Mod_Fannie_Mae_Decisioned_3... Mar 6, 2026 • 35KB • docx	 Non-Delegated Doc Mod Memo Deal Name Mar 6, 2026 • 108KB • docx	
View All		



TIPS & TRICKS

- Conversion may take up to 5 mins. Continue to refresh until you see the Modification List
- Failed conversion will be converted each evening unless failure is due to improper use of the Memo
- Counsels and Lenders must **use versioning** instead of submitting multiple memos under Deal Documents
 - This allows user to see the full list of mods in the Modification List
- Memos must comply with the naming conventions:

Original Submission	Non-Delegated Doc Mod Memo [Deal Name]
Second Submission	Non-Delegated Doc Mod Memo [Deal Name] V2
Third Submission	Non-Delegated Doc Mod Memo [Deal Name] V3