



FHA Catalyst: **Servicing** **Module External** **UI User Guide** **V1.0**

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FHA Catalyst: Servicing External UI User Guide

Document History

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1. Overview: *FHA Catalyst* platform

FHA Catalyst is the new technology platform for managing loan origination and loan servicing information exchange throughout the loan lifecycle for FHA insured loans. The platform includes a user interface and a web services architecture for system to system integration with authorized parties. *FHA Catalyst* is comprised of modules for each stage of the loan lifecycle. To learn more about the broader scope of the *FHA Catalyst* platform, please visit <https://www.hud.gov/catalyst>.

1.1 *FHA Catalyst* Servicer UI Guide

The *FHA Catalyst: Servicing Module Servicer User Guide* provides guidance on how to use the Servicing Module. Please refer to the references listed below for more in-depth information.

For FHA policies and requirements for loan servicing, please utilize:

- Handbook 4000.1, FHA Single Family Housing Policy Handbook

https://www.hud.gov/program_offices/housing/sfh/handbook_4000-1

For questions about this Guide, please contact FHACatalyst@hud.gov or the FHA Resource Center at 1-800-CALLFHA (1-800-225-5342). Persons with hearing or speech support needs may use TDD/TTY by calling 1-877-TDD-2HUD (877-833-2483).

2. User Permissions

For Release 1.0, only Holder and Servicer User Accounts are being granted for the External User Interface (UI). The permissions of both groups are the same.

3. Getting Started

3.1 Access Information

FHA Approved Mortgagees may request access for a new user by contacting the FHA Resource Center at answers@hud.gov. Users will receive an email from HUD containing their username and a password reset.

3.2 Logging In

1. Navigate to *FHA Catalyst: Servicing Module* site to view the log in page via Google Chrome or Microsoft Edge browsers. (**Google Chrome is the preferred browser for *FHA Catalyst***). Other browsers are not fully supported and may cause loss of functionality.

<https://fha-gateway.force.com/hudpdeform>

2. Enter your username and password, then select Login.

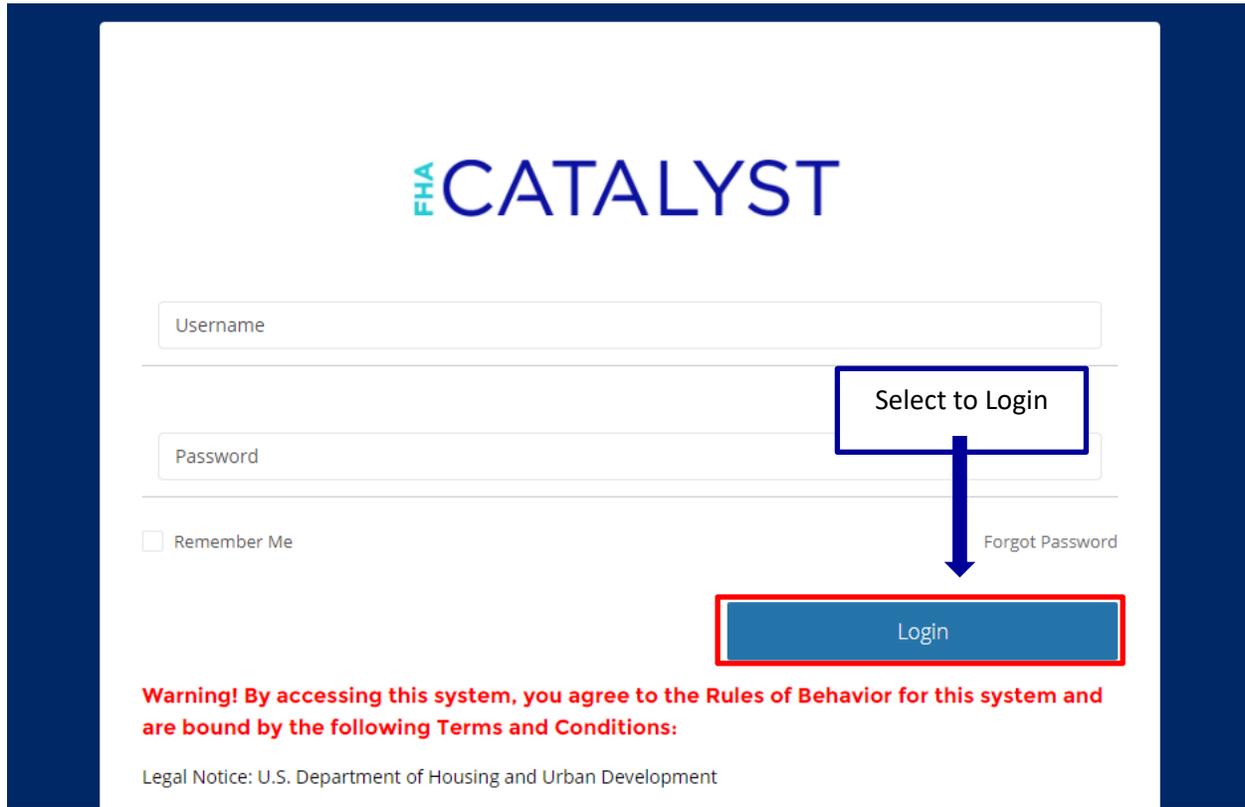


Figure 1: Login Page



3.3 Resetting Your Password

1. If you forgot your password, select Forgot Password.

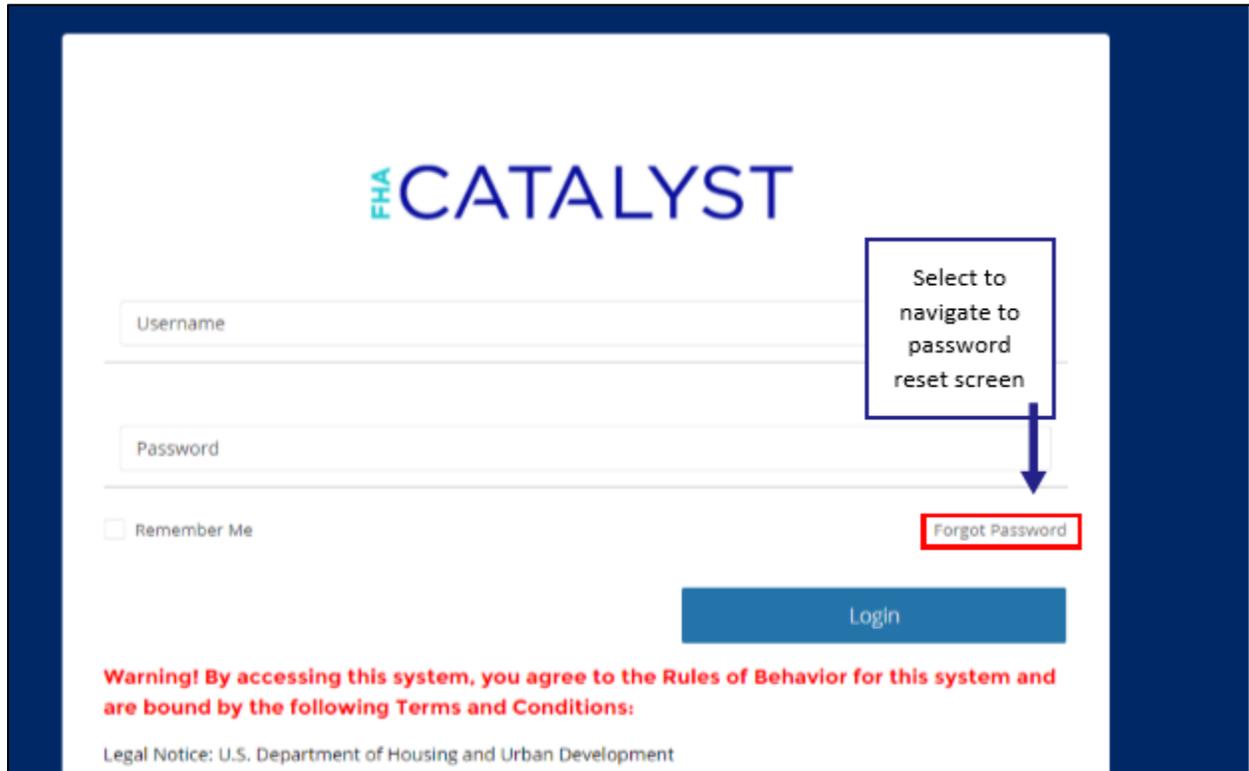


Figure 2: Forgot Password

2. Enter your username, then select Reset Password to reset your password. Password reset instructions will be sent to the email address associated with your account.

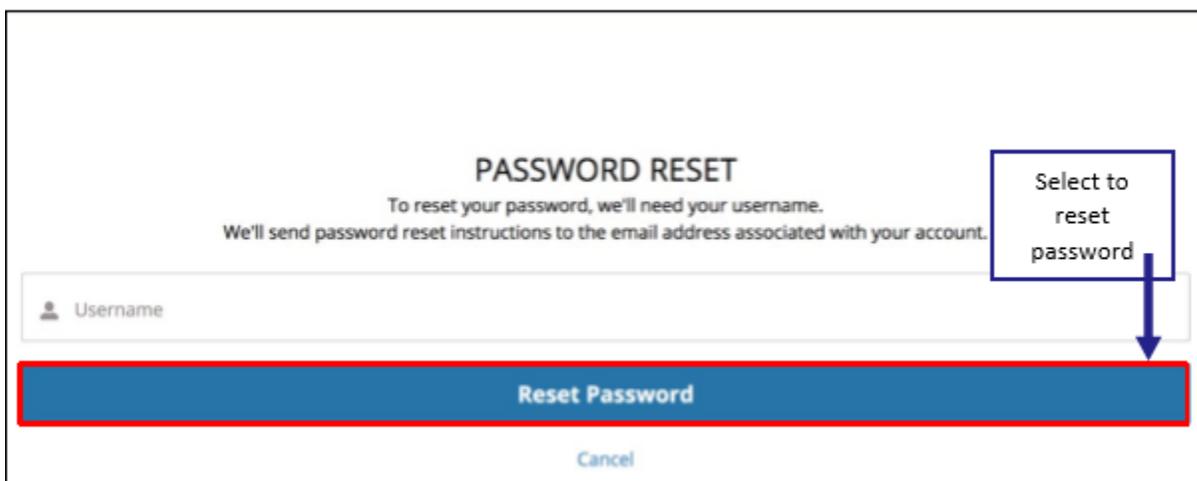


Figure 3: Reset Password



4. Finding Case Information

4.1 Querying a Case

1. After Logging in, you will be directed to the *FHA Catalyst: Servicing* Module Home Page.
2. Depending on your access level you may see multiple items on the home page. To view information regarding a single case, select Active Servicing Icon. Users may have access to other modules within *FHA Catalyst*, and those buttons will display together with the Servicing Icon.

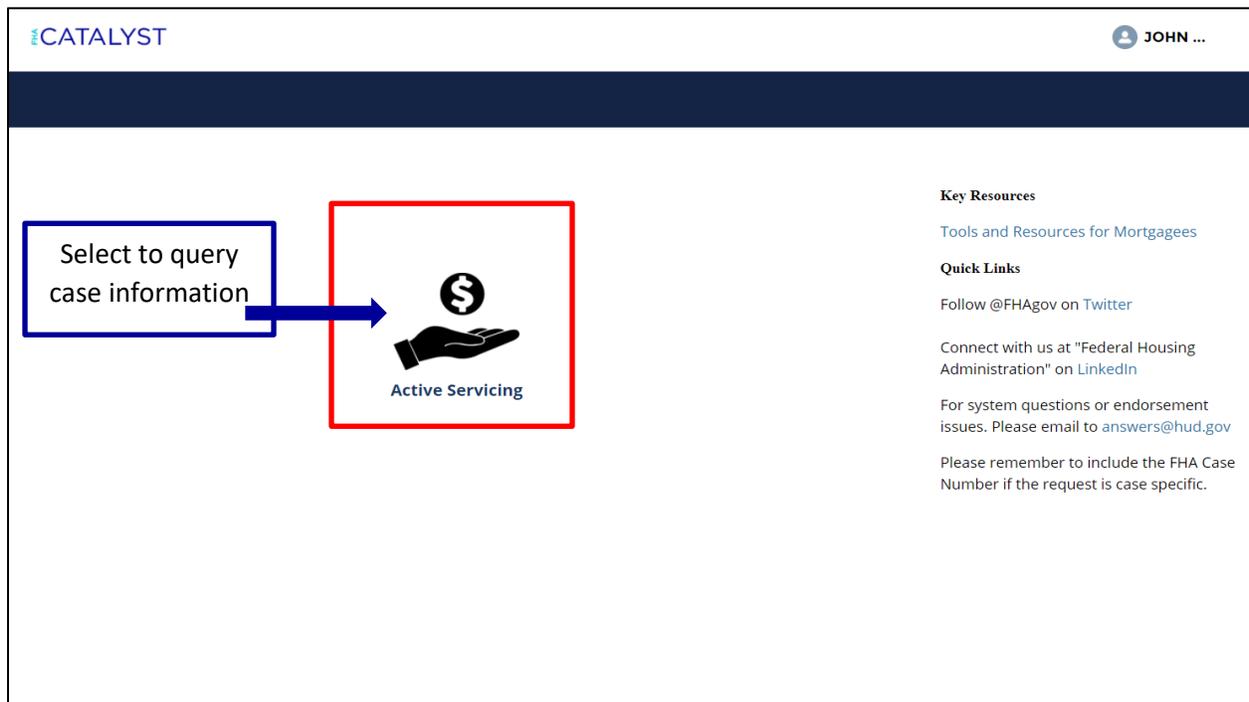


Figure 4: Active Servicing Home Page

3. Enter FHA Case Number in the Text Box, either manually or by copying from another application. Then, select Query.

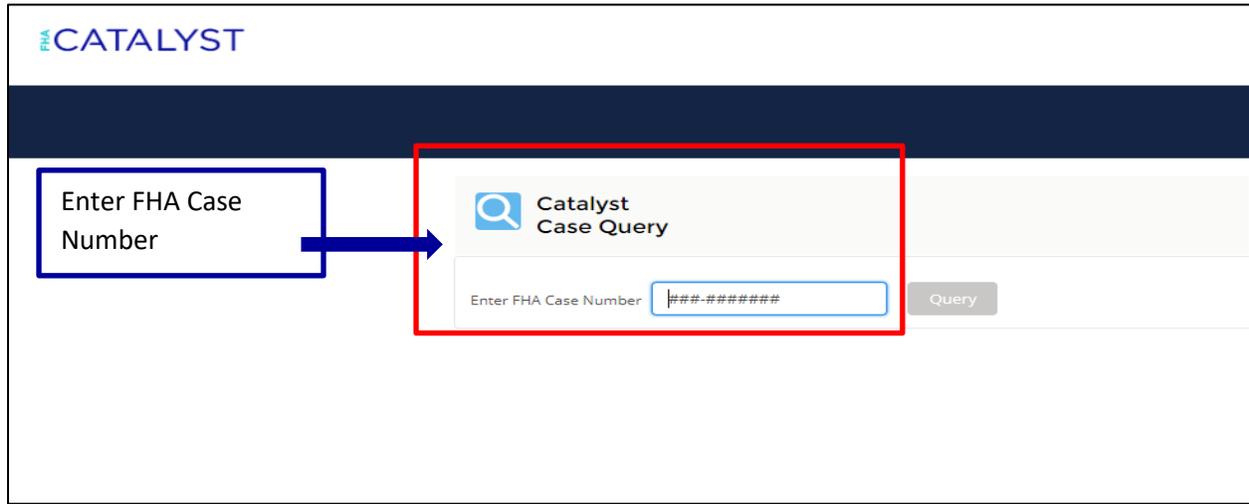


Figure 5: Query Page

4. If the FHA Case Number entered does not match any records, you will receive an error as shown below.

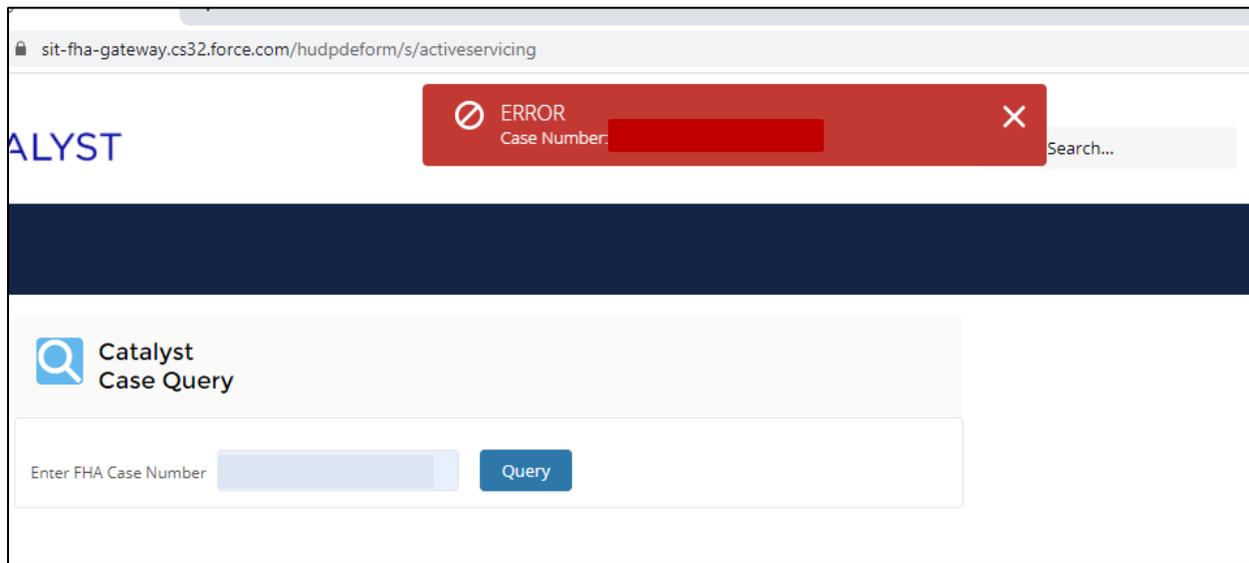


Figure 6: Search Error



5. Results Page

5.1 Viewing Results

- Once a valid FHA Case Number is found, the Case Details will be displayed as below with loan and servicing details.

Note: *Loan Number, Refinance Type, Sponsor/Agent Name, and Case Assignment Date will not be populated for Release 1, but the information will be available in future releases. If any other field is missing data, it was not a required data element for the case and was not sent.*

The screenshot displays the 'Servicing Case' page in the FHA Catalyst system. At the top, there is a search bar and a user profile icon labeled 'USER1...'. A yellow notification banner at the top left states: 'Thank you for submitting your closing package and paying your Upfront Mortgage Insurance Premium. Your initial Periodic Mortgage Insurance Premium will be due on 3/10/2021 by 8pm EST. If the due date falls on a weekend or holiday, the payment will be due the last business day prior to the due date. Please follow existing process to submit your payment.'

The main content area is titled 'Servicing Case' and includes a 'Return to Case Query' button. Below this, a summary table provides key loan metrics:

Loan Lifecycle Status	Loan Number	Loan Type	Holding Lender ID	Servicing Lender ID	Loan to Value Ratio	Original Mortgage Amount
A - Endorsed		1 - Purchase - Existing Occupied			97.7000	\$147,527.00

Below the summary table, there are two rows of detailed information:

Origination Status	Property Address	Holding Lender Name	Servicing Lender Name	Refinance Type	Beginning Amortization Date
E - Endorsed					2/1/2021

The page is divided into two main sections for details:

- Loan Details:** Includes fields for FHA Case Number, Mortgage Term (360 months), Maturity Date (02/51), Endorsement Date (1/11/2021), and Interest Rate (3.2500%).
- Origination Details:** Includes fields for FHA Case Number, Originating Lender Name, ADP Code, Case Assignment Date, Upfront MIP (\$2,537.33), Closing Date/Disbursement Date (1/11/2021), Sponsor/Agent Name, Section of the Act (F - FHA Standard Mortgage (203B)), Program Id, Appraised/Property Value (\$575,000.00), and Amortization Date (2/1/2021).

At the bottom, there is a 'Borrower (2)' section with a table for borrower information:

Type	First Name	Last Name
Primary		
Secondary		

A 'View All' link is located at the bottom right of the borrower table.

Figure 7: Case Results Page



5.2 Tool Tip

1. The definitions of the fields displayed can be found when a user hovers over the tooltip icon.  The complete list of tooltips will be available in [Appendix A](#).

5.3 Periodic Monthly Insurance Premium (PMIP) Due Banner

1. If the loan is available in Active Servicing, and the first month's Periodic Mortgage Insurance Premium is due for the case you are querying, the PMIP Due banner will be displayed on the case details page.

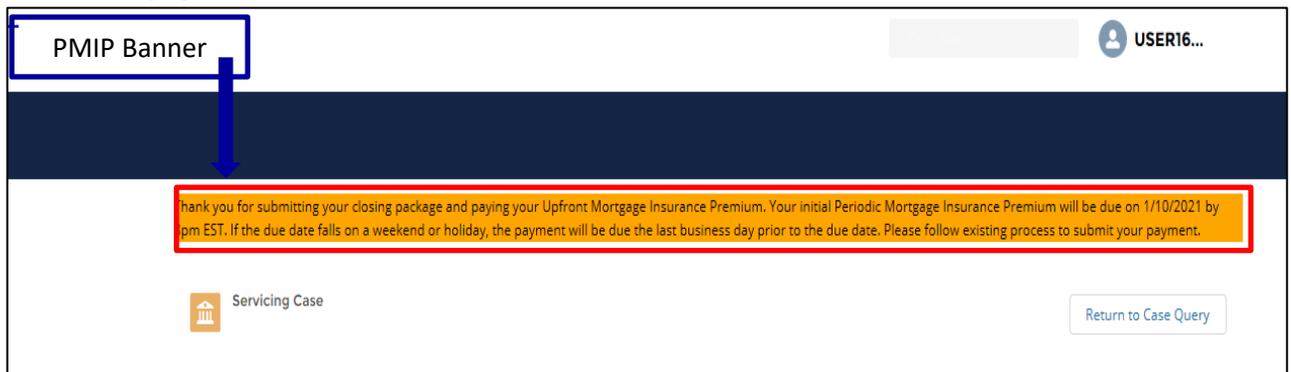


Figure 8: PMIP Due Banner

5.4 More Detailed Information

1. You can use the dropdown arrows to minimize or maximize the information displayed on the results page for more detailed information on the page.
2. In the Borrower information, there is a View All Button that will enable the end user to view only the Borrower's information.

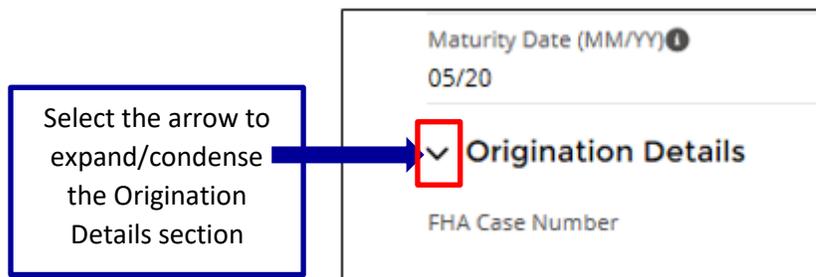


Figure 9: Origination Details Section



5.5 Search a New Case

1. When another case needs to be queried, the preferred method is to use the Return to Case Query button.

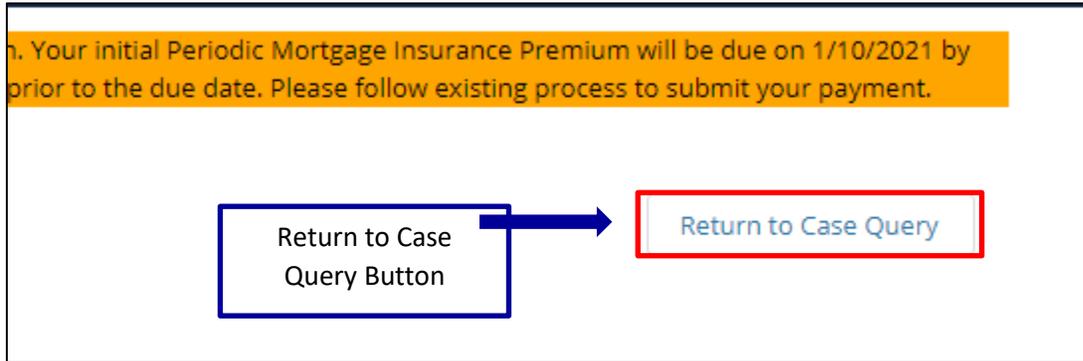


Figure 10: Return to Case Query

5.6 Borrower Information Screen

1. An end user can use the View All button on the Borrower Information section to view just Borrower Information.



Figure 11: Borrower Section

2. An end user can also go back to the case results by selecting the FHA Case Number hyperlink above the Borrower Information.

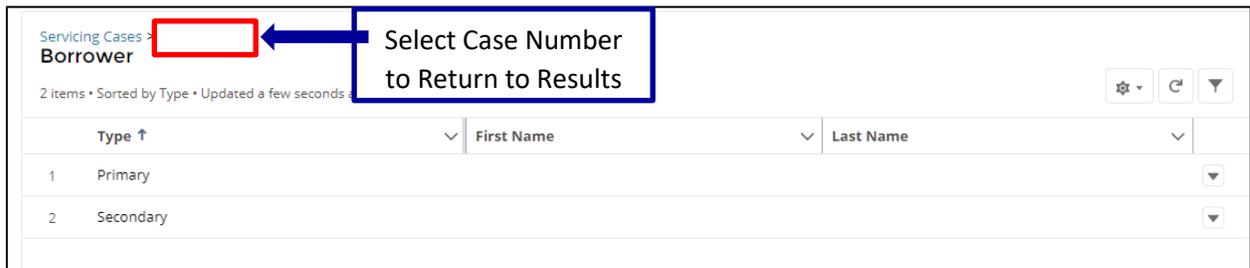


Figure 12: Detail Borrower Information



- An end user can also view the previous cases from the borrower screen by selecting the Servicing Cases next to Case Number above Borrow information.

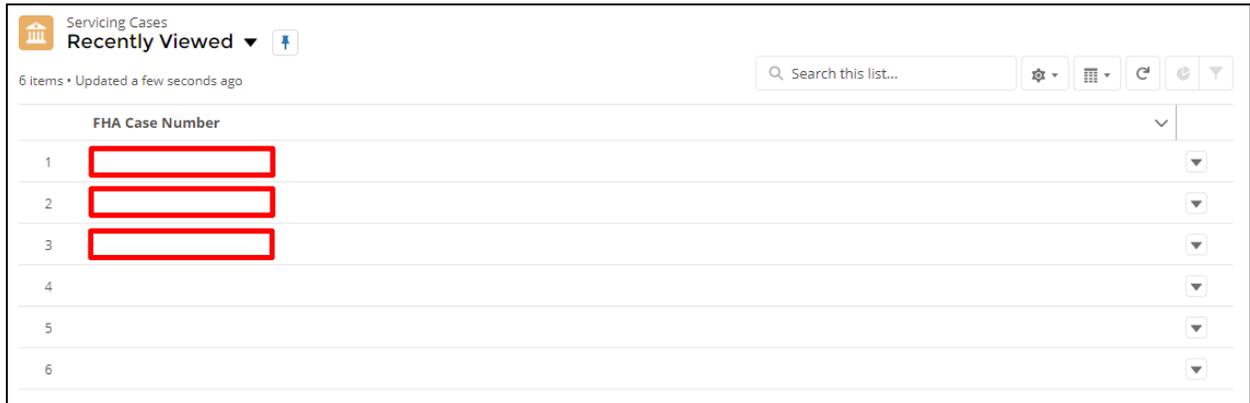


Figure 13: Previously Viewed Cases



6. Appendix

6.1 Appendix A – Tooltip Definitions

Case Overview	Definition
FHA Case Number	Case identifier assigned to FHA Loan during closing
Origination Status	Status to indicate whether a loan is qualified, closed, or endorsed during the Origination phase
Loan Lifecycle Status	Status to indicate the lifecycle stage of the loan
Holding Lender Name	Owner of the mortgage or note
Holding Lender ID	Owner of the mortgage or note
Servicing Lender Name	Mortgagee on record responsible for servicing, including being billed for premiums
Servicing Lender ID	Mortgagee on record responsible for servicing, including being billed for premiums
Original Mortgage Amount	The dollar amount, which identifies the principal obligation involved in a HUD-insured mortgage stated on the homeowner's security instrument at the time of endorsement or loan modification
Borrower Name	Name of the mortgagor responsible for the mortgage loan
Co-Borrower Name	Name of the co-mortgagor
Loan Number	Number assigned to the mortgage loan by the lender
Property Address	Property address of the loan
Beginning Amortization Date	One month prior to the first Principal and Interest payment date; The date when interest begins to be charged on a case; Date could change due to loan modification
Maturity Date (MM/YY)	Month and Year that the mortgage would normally terminate as documented during endorsement or loan modification
Loan-to-Value Ratio	Percentage of the property value or sales price that the mortgage covers; system generated



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Loan Type	Type of loan represents the use of the money borrowed, what the loan is refinancing (e.g. existing home, new home, condo, etc.)
Refinance Type	Indicator whether a case is a refinanced of an old case and if so, what type of refinance (e.g. refi from conventional loan, or a streamline refi, etc.)
Interest Rate	Rate charged annually by the mortgagee, in accordance with the mortgage note or deed of trust note
Origination Details Section	
Originating Lender Name	Institution originating the loan or mortgage and submitting insurance
Sponsor/Agent Name	Agent of the originator
ADP Code	Code representing section of the national housing act under which home loans are insured by the FHA
Section of the Act	FHA loans are authorized by Congress. The ACT that Congress approved the program.
Fund Code	Accounting entities into which all premiums and other income are placed, and from which all claims and expenses are paid. It is provided by SFIS on all transactions.
Program ID	Code entered at the time of endorsement that corresponds directly with the Section of the Act code and that identifies special characteristics of an insurance program not already identified by the Section of the Act
Case Assignment Date	Date when the case number was assigned to this loan
Appraised/Property Value	Value of the property used to determine the loan-to-value ratio
Upfront MIP	Premium to ensure the FHA loan and goes into escrow account.
Closing Date/Disbursement Date	Date the mortgage loan is closed/disbursed; Disbursement date is related to FHA refinance cases
Endorsement Date	Date the mortgage insurance certificate (MIC) is endorsed by the Commissioner



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MIC Issued To	Identifies to whom the mortgage insurance certificate was issued
Amortization Date	One month prior to the first Principal and Interest payment date (this date determines the billing month for single family cases)