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

U.S. Department of Housing and Urban Development

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Document History

<table>
<thead>
<tr>
<th>Version No.</th>
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</thead>
<tbody>
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</tr>
</tbody>
</table>
# Table of Contents

1. Overview: FHA Catalyst platform ................................................................. 4  
   1.1 FHA Catalyst Servicer UI Guide ................................................................. 4  
2. User Permissions ........................................................................................................ 4  
3. Getting Started ......................................................................................................... 4  
   3.1 Access Information .......................................................................................... 4  
   3.2 Logging In ........................................................................................................ 4  
   3.3 Resetting Your Password ................................................................................. 6  
4. Finding Case Information ........................................................................................... 7  
   4.1 Querying a Case ............................................................................................... 7  
5. Results Page ............................................................................................................. 9  
   5.1 Viewing Results ............................................................................................... 9  
   5.2 Tool Tip ........................................................................................................... 10  
   5.3 Periodic Monthly Insurance Premium (PMIP) Due Banner .............................. 10  
   5.4 More Detailed Information ............................................................................. 10  
   5.5 Search a New Case ......................................................................................... 11  
   5.6 Borrower Information Screen ......................................................................... 11  
6. Appendix .................................................................................................................. 13  

# Figures

Figure 1: Login Page .................................................................................................... 5  
Figure 2: Forgot Password ......................................................................................... 6  
Figure 3: Reset Password ......................................................................................... 6  
Figure 4: Active Servicing Home Page ...................................................................... 7  
Figure 5: Query Page .................................................................................................. 8  
Figure 6: Search Error .............................................................................................. 8  
Figure 7: Case Results Page ...................................................................................... 9  
Figure 8: PMIP Due Banner ...................................................................................... 10  
Figure 9: Origination Details section ........................................................................ 10
Figure 10: Return to Case Query
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:

  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

Warning! By accessing this system, you agree to the Rules of Behavior for this system and are bound by the following Terms and Conditions:

Legal Notice: U.S. Department of Housing and Urban Development
3.3 Resetting Your Password

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

![Forgot Password](image)

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.

![Reset Password](image)

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.

![Active Servicing Home Page](image)

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

![Figure 6: Search Error](image-url)
5. Results Page

5.1 Viewing Results

1. 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.

![Figure 7: Case Results Page](image-url)
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](image)

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](image)

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](image)
3. 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](image)
## 6. Appendix

### 6.1 Appendix A – Tooltip Definitions

<table>
<thead>
<tr>
<th>Case Overview</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>FHA Case Number</td>
<td>Case identifier assigned to FHA Loan during closing</td>
</tr>
<tr>
<td>Origination Status</td>
<td>Status to indicate whether a loan is qualified, closed, or endorsed during the Origination phase</td>
</tr>
<tr>
<td>Loan Lifecycle Status</td>
<td>Status to indicate the lifecycle stage of the loan</td>
</tr>
<tr>
<td>Holding Lender Name</td>
<td>Owner of the mortgage or note</td>
</tr>
<tr>
<td>Holding Lender ID</td>
<td>Owner of the mortgage or note</td>
</tr>
<tr>
<td>Servicing Lender Name</td>
<td>Mortgagee on record responsible for servicing, including being billed for premiums</td>
</tr>
<tr>
<td>Servicing Lender ID</td>
<td>Mortgagee on record responsible for servicing, including being billed for premiums</td>
</tr>
<tr>
<td>Original Mortgage Amount</td>
<td>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</td>
</tr>
<tr>
<td>Borrower Name</td>
<td>Name of the mortgagor responsible for the mortgage loan</td>
</tr>
<tr>
<td>Co-Borrower Name</td>
<td>Name of the co-mortgagor</td>
</tr>
<tr>
<td>Loan Number</td>
<td>Number assigned to the mortgage loan by the lender</td>
</tr>
<tr>
<td>Property Address</td>
<td>Property address of the loan</td>
</tr>
<tr>
<td>Beginning Amortization Date</td>
<td>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</td>
</tr>
<tr>
<td>Maturity Date (MM/YY)</td>
<td>Month and Year that the mortgage would normally terminate as documented during endorsement or loan modification</td>
</tr>
<tr>
<td>Loan-to-Value Ratio</td>
<td>Percentage of the property value or sales price that the mortgage covers; system generated</td>
</tr>
<tr>
<td><strong>Loan Type</strong></td>
<td>Type of loan represents the use of the money borrowed, what the loan is refinancing (e.g. existing home, new home, condo, etc.)</td>
</tr>
<tr>
<td>---------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Refinance Type</strong></td>
<td>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.)</td>
</tr>
<tr>
<td><strong>Interest Rate</strong></td>
<td>Rate charged annually by the mortgagee, in accordance with the mortgage note or deed of trust note</td>
</tr>
</tbody>
</table>

**Origination Details Section**

<table>
<thead>
<tr>
<th><strong>Originating Lender Name</strong></th>
<th>Institution originating the loan or mortgage and submitting insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sponsor/Agent Name</strong></td>
<td>Agent of the originator</td>
</tr>
<tr>
<td><strong>ADP Code</strong></td>
<td>Code representing section of the national housing act under which home loans are insured by the FHA</td>
</tr>
<tr>
<td><strong>Section of the Act</strong></td>
<td>FHA loans are authorized by Congress. The ACT that Congress approved the program.</td>
</tr>
<tr>
<td><strong>Fund Code</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Program ID</strong></td>
<td>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</td>
</tr>
<tr>
<td><strong>Case Assignment Date</strong></td>
<td>Date when the case number was assigned to this loan</td>
</tr>
<tr>
<td><strong>Appraised/Property Value</strong></td>
<td>Value of the property used to determine the loan-to-value ratio</td>
</tr>
<tr>
<td><strong>Upfront MIP</strong></td>
<td>Premium to ensure the FHA loan and goes into escrow account.</td>
</tr>
<tr>
<td><strong>Closing Date/Disbursement Date</strong></td>
<td>Date the mortgage loan is closed/disbursed; Disbursement date is related to FHA refinance cases</td>
</tr>
<tr>
<td><strong>Endorsement Date</strong></td>
<td>Date the mortgage insurance certificate (MIC) is endorsed by the Commissioner</td>
</tr>
<tr>
<td>MIC Issued To</td>
<td>Identifies to whom the mortgage insurance certificate was issued</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Amortization Date</td>
<td>One month prior to the first Principal and Interest payment date (this date determines the billing month for single family cases)</td>
</tr>
</tbody>
</table>