



# ***FHA Catalyst:***

## **Claims Module**

### **Single Family**

### **Forward Claims**

### **User Guide**

**U.S. Department of Housing and Urban Development**

*December 2020*



## Solution Information

	Information
Solution Name	<i>FHA Catalyst: Claims Module</i>
Solution Acronym	<i>CM</i>
Project Cost Accounting System (PCAS) Identifier	
Document Owner	<i>OCIO</i>
Primary Segment Sponsor	
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## Document History

Version No.	Date	Author	Revision Description
1.0	12/12/2019	Development Contractor	Original Document
2.0	2/28/2020	HITM	Platform Name updated throughout the document
3.0	3/12/2020	Development Contractor	Document updated to include bulk submission
4.0	7/14/2020	Development Contractor	Document updated to include submission correction process
5.0	8/27/2020	Development Contractor	Document updated to include dashboard, reporting, and error code processes
6.0	11/23/2020	Development Contractor	Viewing HUD Comments Field



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## 1. Welcome to *FHA Catalyst*: Claims Module

*FHA Catalyst*: Claims Module is a web-based system that supports all claim submission functions for the Federal Housing Administration (FHA). As part of the Housing Information Technology (IT) Modernization effort, the Claims Module will streamline the process for claim submitters and FHA staff. Users can submit single family forward claims to the same location electronically, which eliminates manual errors, enables real-time case status updates, and creates a modernized experience through automation.

This document has been developed to provide users with guidance on how to use the Claims Module. Please refer to the Single Family Housing Policy Handbook 4000.1 for in-depth information on FHA policy, event definitions, reporting timeframes, data elements, and post-audit requirements.

### 1.1 Navigating the *FHA Catalyst*: Claims Module User Guide

The table of contents for this guide is both searchable and linked. Selecting any of the chapter titles or subheadings will take users directly to that section. Users can navigate back to the table of contents by scrolling back to the start of the guide or using the [return to table of contents](#) links at the end of each section.




This guide features step-by-step instructions to complete tasks in the Claims Module, utilizing numbered lists, bullets, and screenshots.

#### Step-by-Step Instructions

1. Instructions describing how to complete tasks appear in lists.
2. Words that point to **links** or **boxes** that the user needs to select will appear in **bold**.
3. These instructions will describe how to complete processes using screenshots.
4. Screenshots may also include boxes, lines, and labels to show which part of the screen is important.

### 1.2 Understanding the Icons

This user guide features icons to alert users to important information, especially during step-by-step instructions. This guide uses the following icons:

-  Contains supplementary information about actions that servicers take in the Claims Module.
-  Contains cautionary information about actions; usually a clarifying statement to assist a user with execution.
-  Indicates highly important information that is critical to an action.

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## 2. Getting Started

### 2.1 Access Information

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

### 2.2 Logging In

1. Navigate to *FHA Catalyst: Claims Module* site to view the log in page via Google Chrome: <https://www.hud.gov/FHACatalyst-Claims>
2. Enter your username and password, then select **Login**.

The screenshot shows the login page for the FHA Catalyst system. The page has a dark blue header with the "FHA CATALYST" logo. Below the header, there are two input fields for "Username" and "Password". Below these fields are two links: "Remember Me" and "Forgot Password". A blue "Login" button is positioned to the right of the "Forgot Password" link. Below the button, there is a red warning message: "Warning! By accessing this system, you agree to the Rules of Behavior for this system and are bound by the following Terms and Conditions:". At the bottom of the page, there is a detailed disclaimer text regarding the system's security and usage policies.

Figure 1: Login Page



## 2.3 Resetting Your Password

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

The screenshot shows the FHA CATALYST login interface. It features a header with the FHA CATALYST logo. Below the logo are input fields for 'Username' and 'Password', a 'Remember Me' checkbox, and a 'Login' button. A red box highlights the 'Forgot Password' link, and a blue arrow points to it from a text box that says 'Select to navigate to password reset screen'. Below the login fields, there is a red warning message: 'Warning! By accessing this system, you agree to the Rules of Behavior for this system and are bound by the following Terms and Conditions:'. At the bottom, there is a 'Legal Notice: U.S. Department of Housing and Urban Development'.

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.

The screenshot shows the 'PASSWORD RESET' form. It has a title 'PASSWORD RESET' and a subtitle 'To reset your password, we'll need your username. We'll send password reset instructions to the email address associated with your account.' Below this is a 'Username' input field. A blue arrow points from a text box that says 'Select to reset password' to the 'Reset Password' button, which is highlighted with a red box. There is also a 'Cancel' link below the button.

Figure 3: Reset Password

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## 3. Account Profile

### 3.1 Viewing Your Account Profile

**i** After logging in, you will be directed to the *FHA Catalyst*: Claims Module Home Page.

1. To view your account profile, select **Account Profile**.

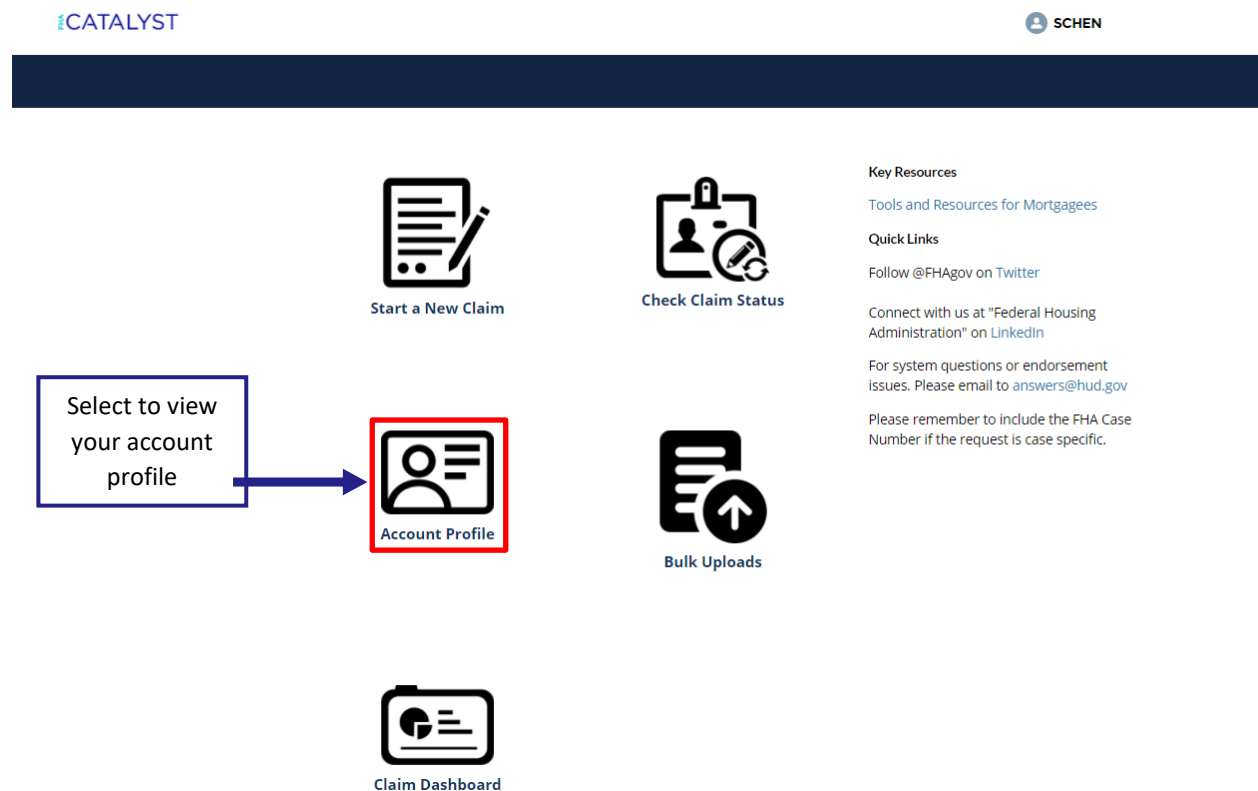


Figure 4: *FHA Catalyst*

### 3.2 Updating Your Account Profile

1. To edit your account profile, select **Edit** in the top right corner of the account profile page.

Figure 5: Edit Your Account Profile





2. Update the fields you would like to change, then select **Save**.

⚠ Required fields are denoted with a red asterisk.

**About**

\* Name

First Name

Middle Name

\* Last Name

Suffix

Manager

Search People...

Title

Company Name

**Contact**

Email

Mobile

Phone

Address

Street

City

State/Province

Zip/Postal Code

Country

**Background**

About Me

Cancel Save

Select to save changes made to your account profile

Figure 6: Update Your Account Profile

[Return to table of contents](#)

## 4. Claim Entry and Submission – Single

### 4.1 Starting a New Claim

**i** After logging in, you will be directed to the *FHA Catalyst*: Claims Module Home Page.

1. To submit a new claim via single submission, select **Start a New Claim**.

 CATALYST

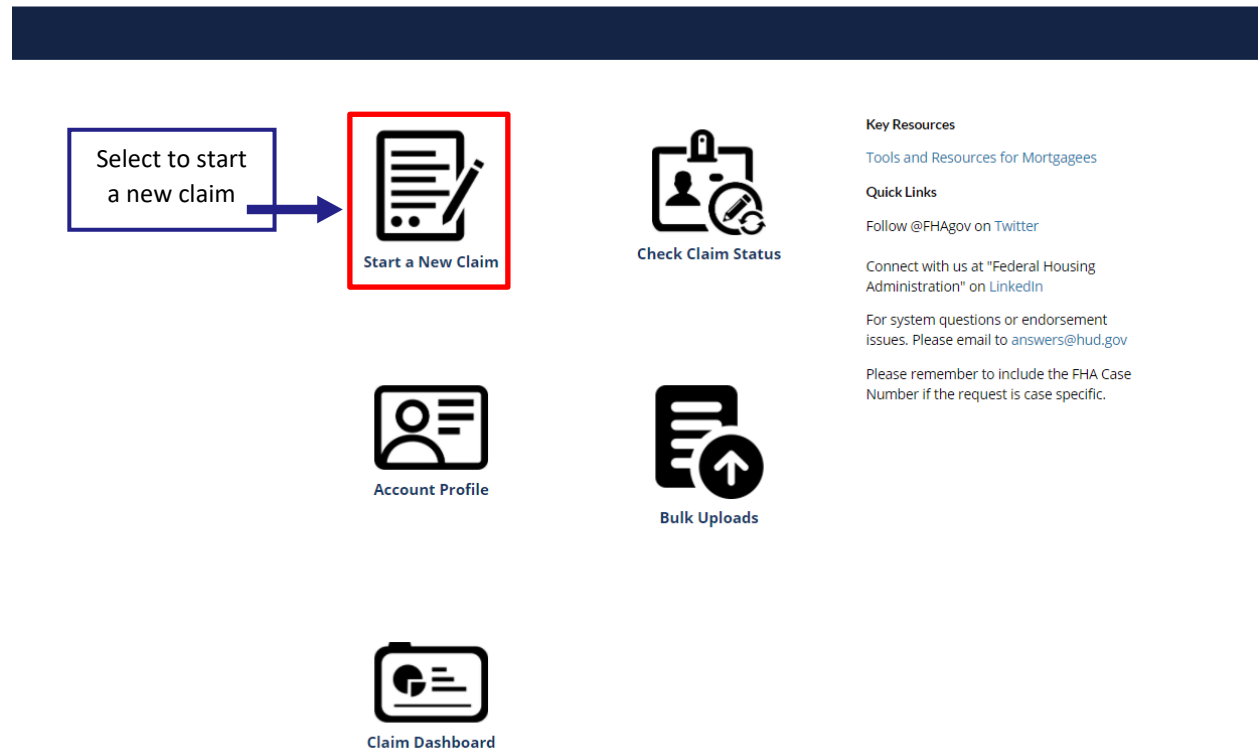


Figure 7: *FHA Catalyst*

2. From the Claim Initiation screen, select the desired claim type for submission and enter in the FHA case number for the claim.
3. Select **Save & Next** to continue.

**Claim Initiation**

Provide the following details to complete your claim submission.

**\* 1. Claim Type**

Select the claim type

05-Supplemental

**\* 2. FHA Case Number**

Enter the claim FHA Case Number

**Submission Exception**

--Select--

If applicable, select the submission exception

**\* Previous Claim Type**

Select the previous claim type

Save & Next

Select to save and continue

Figure 8: Claim Initiation Screen

## 4.2 Entering Information in a New Claim

- i Each part of the claim form (Part A, B, C, D, E) is broken up into separate screens. Enter information based on what is needed for the claim submission.
- ⚠ Required fields are denoted by a red asterisk.
- ⚠ Incorrect entries are noted underneath fields that must be resolved before continuing.



## Part A - General Information

Provide the following details to ensure timely processing of this claim submission.

### 1. Claim Type

05-Supplemental

### 2. FHA Case Number

123-4567890

Select the date of endorsement

### 3. Section of the Act Code

### \* 5. Endorsement Date (from MIC)

5/5/2000

### 7a. Due Date of First Payment to Principal and Interest: Original

### 7b. Due Date of First Payment to Principal and Interest: Modified

### 8. Due Date Last Complete Installment Paid

### 9. Date of Possession and Acquisition of Marketable Title

### 10. Date Deed or Assignment Filed for Record or Date of Closing or Appraisal

### 11. Foreclosure Proceedings

- ☐ a. Instituted  
☐ b. Date of Deed in Lieu

Enter the Holding Mortgagee Number

Enter the Servicing Mortgagee Number

### \* 12. Holding Mortgagee Number (Payee) (10 digits)

### \* 13. Servicing Mortgagee Number (10 digits)

### 14. Mortgagee Reference Number (maximum of 15 digits)

### \* 15a. Mortgage Amount: Original

Enter the Original Mortgage Amount

Figure 9: Part A – General Information

- At the bottom of each page, there is an area to add mortgagee comments.
- Navigation buttons are located at the bottom of each page so users can navigate through the submission process. Navigation buttons do the following:
  - Select **Previous** to navigate to the previous screen.
  - Select **Save & Next** to save all information in the claim and navigate to the next screen.
  - Select **Save & Close** to save all information in the claim and return to the *FHA Catalyst*.
  - Select **Cancel** to return to the *FHA Catalyst* without saving.

Mortgagee's Comments, If Any

Enter mortgagee comments

Select to navigate through the site

Previous Save & Next Save & Close Cancel

Figure 10: Mortgagee Comments and Navigation Buttons

- ❗ If **Save & Next** or **Save & Close** is selected without properly entering all required fields, a validation error appears and prevents proceeding to the next screen.

Validation errors occur when a user tries to advance when fields are incorrect

Validation Error  
Please resolve entry errors and issues for each field on this screen before saving.

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**Part A - General Information**

Provide the following details to ensure timely processing of this claim submission.

1. Claim Type 05-Supplemental	2. FHA Case Number 123-1123506
3. Section of the Act Code	*5. Endorsement Date (from MIC) <small>Complete this field.</small>
7a. Due Date of First Payment to Principal and Interest: Original	7b. Due Date of First Payment to Principal and Interest: Modified
8. Due Date Last Complete Installment Paid	9. Date of Possession and Acquisition of Marketable Title
10. Date Deed or Assignment Filed for Record or Date of Closing or Appraisal	
11. Foreclosure Proceedings <input type="radio"/> a. Instituted <input type="radio"/> b. Date of Deed in Lieu <a href="#">Clear</a>	
*12. Holding Mortgagee Number (Payee) (10 digits) <small>Must be numeric and exactly 10 digits</small>	*13. Servicing Mortgagee Number (10 digits) <small>Must be numeric and exactly 10 digits, and must be valid for your account</small>
14. Mortgage Reference Number (maximum of 15 digits)	*15a. Mortgage Amount: Original <small>Complete this field.</small>

**Figure 11: Validation Errors**

- ❗ To create “repeaters” – areas where the same information can be entered multiple times (e.g. 32. Schedule of Tax Information) – users can select the **Add** button to add information multiple times, if applicable.

- ⚠ For example, selecting ‘Add 32. Schedule of Tax Information’ will add another set of ‘Schedule of

**32. Schedule of Tax Information**

*32a. Tax Year <small>Complete this field.</small>	*32b. Type of Tax or Assessment
*32c. Collector's Property Identification	*32d. Amount Paid
*32e. Period Covered From	*32f. Period Covered To
*32g. Date Paid	

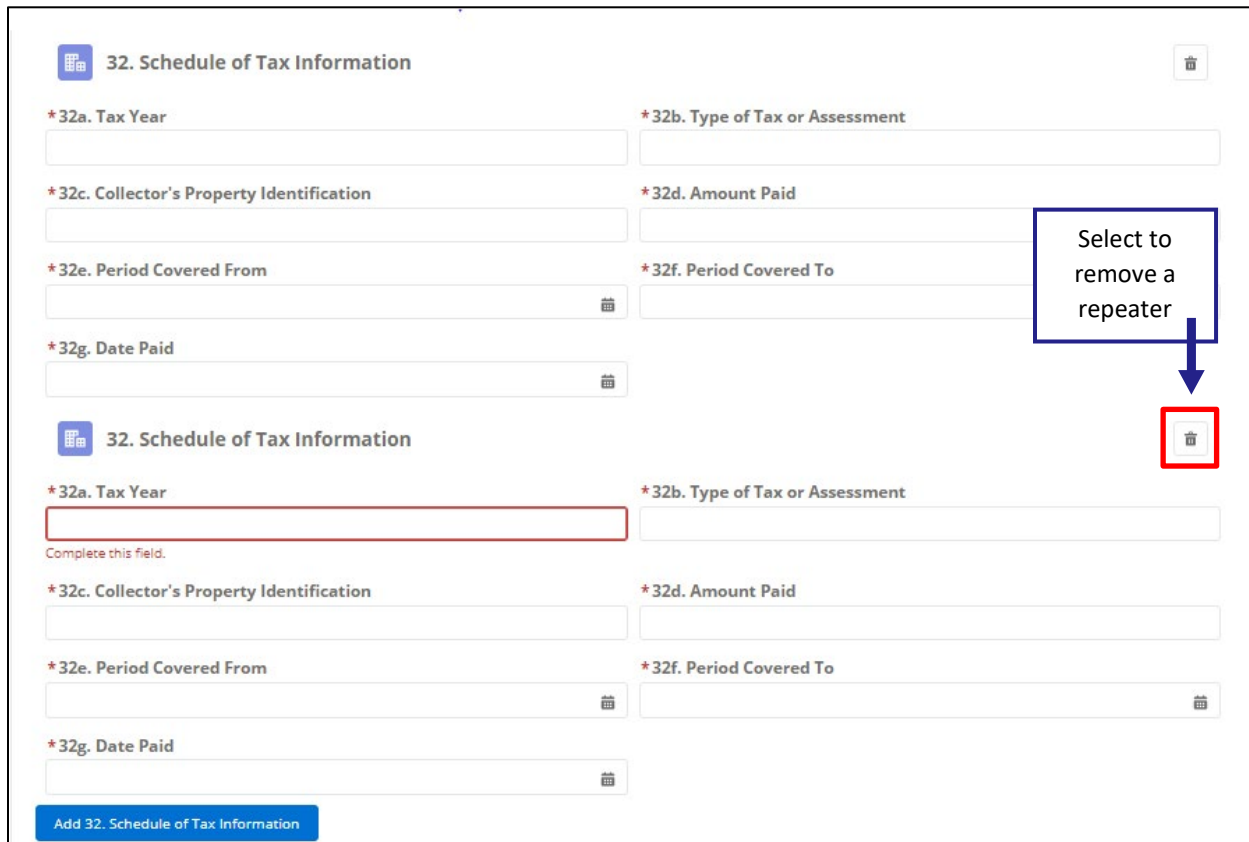
Select to add an additional tax information section

**Add 32. Schedule of Tax Information**

Tax Information’ fields which can be populated independently of each other.

**Figure 12: Adding Repeaters**

**i** To remove a repeater, select the **Trash Can** icon in the top-right corner.



The screenshot displays two identical forms titled "32. Schedule of Tax Information". Each form contains the following fields:

- \* 32a. Tax Year
- \* 32b. Type of Tax or Assessment
- \* 32c. Collector's Property Identification
- \* 32d. Amount Paid
- \* 32e. Period Covered From
- \* 32f. Period Covered To
- \* 32g. Date Paid

A blue button at the bottom of the first form is labeled "Add 32. Schedule of Tax Information". In the second form, the Trash Can icon in the top-right corner is highlighted with a red box. A blue box with the text "Select to remove a repeater" and a downward-pointing arrow indicates that clicking this icon will remove the repeater.

**Figure 13: Removing Repeaters**

### 4.3 Attaching Documents to a Claim

- ⚠** At the bottom of each page, there is a prompt to attach supporting documentation for each part of the claim.
- 1. Select **Upload Files** to attach files or drag and drop files from the user's computer into the box.

Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files (0)

Select to attach files

Upload Files Or drop files

Mortgagee's Comments, If Any

Public Reporting Burden for this collection of information is estimated to average 1.33 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This information is being collected to file a claim for Single Family Federal Housing Administration (FHA) insurance benefits. This information is required to obtain mortgage insurance benefits. This agency may not collect this information, and you are not required to complete this form, unless it displays the currently valid OMB control number 2502-0429, 2502-0589 or 2502-0611.

**Sensitive Information.** Some information collected on this form is considered sensitive and is protected by the Privacy Act. The Privacy Act requires that these records be maintained with appropriate administrative, technical, and physical safeguards to ensure their security and confidentiality. In addition, these records should be protected against any anticipated threats or hazards to their security or integrity which could result in substantial harm, embarrassment, inconvenience, or unfairness to any individual on whom the information is maintained.

Please see HUD Handbook 4000.1, FHA Single Family Housing Policy Handbook for submission instructions for forward mortgages.

Save & Next Save & Close Cancel

Figure 14: Attaching Supporting Claim Documentation

1. After attaching a file, a green check mark with a thumbnail of the document will appear, indicating the file is loaded and ready to be uploaded.
2. Once the files have been attached, select **Done** to upload it to the page.

Upload Files

Select to upload files

Test.pdf 39 KB

1 of 1 file uploaded

Done

Figure 15: Attaching Supporting Documentation

1. Once a file has been uploaded, it can be seen at bottom of the page.
2. To download an uploaded file directly to the user's desktop, select the **Download Icon**.
3. To remove a file that has been uploaded, select the **Trash Can** icon.
4. To continue to upload more files, select the **Upload Files** button.

Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files

Select to download files to desktop

Select to remove files

Upload Files Or drop files

Select to attach additional files

testing Nov 23 File Ty

Figure 16: Uploading Supporting Documentation



## 4.4 Submitting a Claim

1. After completing all the parts of each form necessary to submit the claim, select **Save & Next**. From there, users will be directed to a read-only page containing all information entered on previous screens. (Using Supplemental Claim Type as an example, the flow will be from Part A, C, D, E and B)

### e.g. Part C Screen (Using Supplemental Claim Type as an example)

Form Saved  
Your form was saved successfully.

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#### Part C - Support Document

201. FHA Case Number

203. Mortgagee's Reference Number

205. Debenture Interest Rate

Disbursements for Protection and Preservation

Date Paid *	Date Work Completed *	Description of Service Performed *	Amount Paid \$ *	Debenture Interest \$ *
<div>Add New Item</div>				

**Certification:** The undersigned certifies that the amounts listed above represent all the expenses actually paid by on or behalf of the mortgagee in connection with the foreclosure, acquisition, conveyance, assignment operation, protection, or preservation of the property identified by the above FHA case number and that the information shown above is true and correct, and the undersigned agrees that upon request of HUD it will furnish receipted invoices for any amounts shown above.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

By signing below, the undersigned certifies that the statements and information contained hereon (face and reverse) are true and correct.

Please see HUD Handbook 4000.1, FHA Single Family Housing Policy Handbook for submission instructions for forward mortgages.

Mortgagee Contact Name

Mortgagee Contact Telephone

Mortgagee Contact Telephone Extension

Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files (0)

Upload Files Or drop files

Mortgagee's Comments, If Any

Previous

Save & Next

Save & Close

Cancel

Figure 17: Part C Screen

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## e.g. Part D Screen (Using Supplemental Claim Type as an example)

Form Saved  
Your form was saved successfully.

Search...

SCHEIN

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### Part D - Support Document

300. FHA Case Number

302. Mortgagee's reference number

303. Debenture Interest Rate

305. Disbursements for HIP, taxes, ground rents and water rates (which were liens prior to mortgage), eviction costs and other disbursements not shown elsewhere. (Do not include penalties for late payment.) Only costs incurred between the dates in Items 8 and 10 of Part A are allowed.

Date Paid \*

Add New Item

Description \*

Amount Paid \$ \*

Debenture Interest \$ \*

306. Attorney/Trustee Fees

Date Paid \*

Add New Item

Type \*

Description \*

Amount Paid \$ \*

Debenture Interest \$ \*

307. Foreclosure and/or acquisition, conveyance and other costs

Date Paid \*

Add New Item

Description \*

Amount Paid \$ \*

Debenture Interest \$ \*

308. Taxes on Deed

Date Paid \*

Add New Item

Type \*

To Mortgagee \*

To HUD \*

Amount Paid \$ \*

Debenture Interest \$ \*

309. Special Assessments (Do not use for Coinsurance, see Part E)

Date Paid \*

Add New Item

Date Lien Attached \*

Description \*

Amount Paid \$ \*

Debenture Interest \$ \*

310. Bankruptcy

Date Paid \*

Add New Item

Description \*

Amount Paid \$ \*

Debenture Interest \$ \*

311. Mortgage Insurance Premiums

Date Paid \*

Add New Item

Period Covered From \*

Period Covered To \*

Amount Paid \$ \*

Debenture Interest \$ \*

Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files (0)

Upload Files

Or drop files


Mortgagee's Comments, If Any

Previous Save & Next Save & Close Cancel

Figure 18: Part D Screen



## e.g. Part E Screen (Using Supplemental Claim Type as an example)



Form Saved  
Your form was saved successfully.

Search...

SCHEN

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**Part E - Support Document**

400. FHA Case Number

402. Mortgagee's Reference Number

403. Debenture Interest Rate

405. Overhead Costs

One Time Charge (not to exceed \$40)

No. of Months

X

Amount

\*

\$0.00

Entered on Line 125, Part B

Calculated

\$0.00

406. Amounts due from buyer at closing or at appraisal notice date for:

Amount Due Type \*

Description \*

Amount Due \$ \*

Add New Item

407. Amounts owed to buyer at closing or at appraisal notice date for:

Date Paid \*

Amount Owed Type \*

Description \*

Amount Owed \$ \*

Add New Item

408. Additional closing costs at settlement

Date Paid \*

Closing Cost Type \*

Description \*

Closing Cost \$ \*

Add New Item

409. Appraisal Fee

Date Paid \*

Description \*

Appraisal Fee \$ \*

Add New Item

410. Deficiency Judgment Costs/Fees

Date Paid \*

Description \*

Deficiency Judgment Costs \$ \*

Add New Item

Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files (0)

Upload Files

Or drop files

Mortgagee's Comments, if Any

Previous

Save & Next

Save & Close

Cancel

Figure 19: Part E Screen



e.g. Part B Screen (Using Supplemental Claim Type as an example)

**Part B - Fiscal Data**

101. FHA Case Number  
125-112,006

103. Mortgagee's Reference Number

105. Exp. date to Submit Title Evidence, or fiscal data for Part B

Line Number	Description	Deductions	Additions	Interest
107	Adjustment to Loan Balance (if different from Item 17, Part A)			
108	Sale/Ref or Appraisal Value (for Coinsurance or Nonconveyance)			
109	Escrow Balance (as of date in Item 10, Part A - Date died or assignment filed for record or date of closing or appraisal)			
110	Total Disbursements for Protection and Preservation (from line 294, Part C)		\$0.00	\$0.00
111	Total Disbursements (from line 305, Part D)		\$0.00	\$0.00
112	Attorney/Trustee Fees Paid (from line 306, Part D)		\$0.00	\$0.00
113	Foreclosure, Acquisition, Conveyance, and Other Costs (from line 307, Part D)		\$0.00	\$0.00
114	Bankruptcy Fee (if applicable) (from line 310, Part D)		\$0.00	\$0.00
115	Rental Income			
116	Rental Expense			
117	Total Taxes on Debt (from line 308, Part D)		\$0.00	\$0.00
118	Recovery or Damage (if not reported on Part A)			
120	Special Assessments (Do Not Use for Coinsurance) (from line 309, Part D)	\$0.00	\$0.00	\$0.00
121	Mortgage Note Interest (Assignments, Coinsurance, and Special Forbearance Agreements Only)	From To Rate %		
122	Mortgage Insurance Premiums (from line 311, Part D)		\$0.00	\$0.00
123	Unapplied Section 235 Assistance Payments (Earned Assistance only)			
124	Overpaid Section 235 Assistance Payments			
	Coinsurance or Nonconveyances Only			
125	Overhead Costs (from line 405, Part E)		\$0.00	
126	Uncollected Interest (Approved Forbearance Agreements Only)			
127	Amount due from buyer at closing or at appraisal notice date (from line 406, Part E)	\$0.00		
128	Amount owed to buyer at closing or at appraisal notice date (from line 407, Part E)		\$0.00	
	See Instructions			
129	Additional closing costs (from line 408, Part E)	\$0.00	\$0.00	
130	Appraisal Fee (from line 409, Part E)		\$0.00	
131	Deficiency Judgment Costs/Fees (from line 410, Part E)		\$0.00	
	134. Total Deductions =		135. Total Additions =	136. Total Interest =
	137. Net Claim Amount (Columns E - A + C) = \$0.00			



**\*Mortgagee Contact Name**  
Test Claims Submitter

**\*Mortgagee Contact Telephone** **Mortgagee Contact Phone Extension**

**Mortgagee Contact Email**

**Certification:** The undersigned certifies that the amounts listed above represent all the expenses actually paid by on or behalf of the mortgagee in connection with the foreclosure, acquisition, conveyance, assignment operation, protection, or preservation of the property identified by the above FHA case number and that the information shown above is true and correct, and the undersigned agrees that upon request of HUD it will furnish receipted invoices for any amounts shown above.

I/We, the undersigned, certify under penalty of perjury that the information provided above is true and correct.

**Warning:** Anyone who knowingly submits a false claim, or makes false statements is subject to criminal and civil penalties, including confinement for up to 5 years, fines, and civil penalties. (18 U.S.C. §§ 287, 1001 and 31 U.S.C. §3729)

Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files (0) [Upload Files](#) Or drop files

Mortgagee's Comments, If Any

[Previous](#) [Save & Next](#) [Save & Close](#) [Cancel](#)

Figure 20: Part B Screen

By transmitting, the Mortgagee certifies that the statements and information entered are true and correct.

☒ Ready to transmit claim to HUD? **Check to enable Submit Button**

Please Check the box above to Submit the form

[Previous](#) [Cancel](#) [Submit](#)

Figure 21: Claim Submission

2. Lenders need to ensure the Mortgagee Contact Name and Mortgagee Contact Telephone are entered, then can click Save & Next to view all Parts on the read only page before Submission.
3. The check box labeled "Ready to transmit claim to HUD?" must be checked to enable the Submit button.
4. Select **Submit** to submit the claim form.
5. After selecting **Submit**, a second prompt will open to confirm users wish to transmit the claim to HUD. Select **Submit** to complete the claim submission process or select **Cancel** to be returned to the read-only page.

### Confirm Claim Submission

**WARNING: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012, 31 U.S.C. 3729, 3802)**

By transmitting, the Mortgagee certifies that the statements and information entered are true and correct.

Ready to transmit claim to HUD?

Select to submit

**Figure 22: Confirming Claim Submission**

- i **Mortgagee's Comments, If Any:** The input can be added by Lenders during Claims entry. Visible to both Lenders and HUD users.
- i Lenders can see the lender status changes on the lender portal once updated by HUD.



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**Part A - General Information**

**Lender Status**  
Paid

Submitted By/Signature

1. Claim Type  
05-Supplemental

Date/Time Submitted

Date  
11/23/2020

Time  
5:25 PM


Submitter Account  
Test Claims C Account

2. FHA Case Number

**Figure 23: Lender Status**

- i Lenders can view the comments provided by HUD under Mortgagee's Comments, If Any.

**Part B Documents**

 Files (0)

Or drop files

**Mortgagee's Comments, If Any**

HUD has reviewed the claim and can provide the info. for Lenders to review - Info. can be entered here.



Done

**Figure 24: Mortgagee Comments**



**NOTE:** Lenders can go back to the all claims list view to check claim status by clicking DONE button. Or clicking FHA Catalyst Logo to go back to the lender landing home page.

 CATALYST

 All Claims 

31 Items • Sorted by Date/Time Submitted • Filtered by All form submissions - Internal Status • Updated a few seconds ago

Search this list...

	Form...	Form Type	FHA Ca...	Mortgage Re...	Lender Status	Date/Time S...	Owner Account
1	F-0112301	05-Supplemental				11/23/2020 5:25 PM	Test Claims C Account
2	F-0112300	41B - Replacement Conveyan...				11/20/2020 2:50 PM	Test Claims C Account
3	F-0112298	11A - Reacquisition - Part A				11/20/2020 2:48 PM	Test Claims C Account
4	F-0112297	11AB - Reacquisition - Parts A...				11/20/2020 2:46 PM	Test Claims C Account
5	F-0112296	11A - Reacquisition - Part A				11/20/2020 2:44 PM	Test Claims C Account

**Figure 25: All Claims**

[Return to table of contents](#)

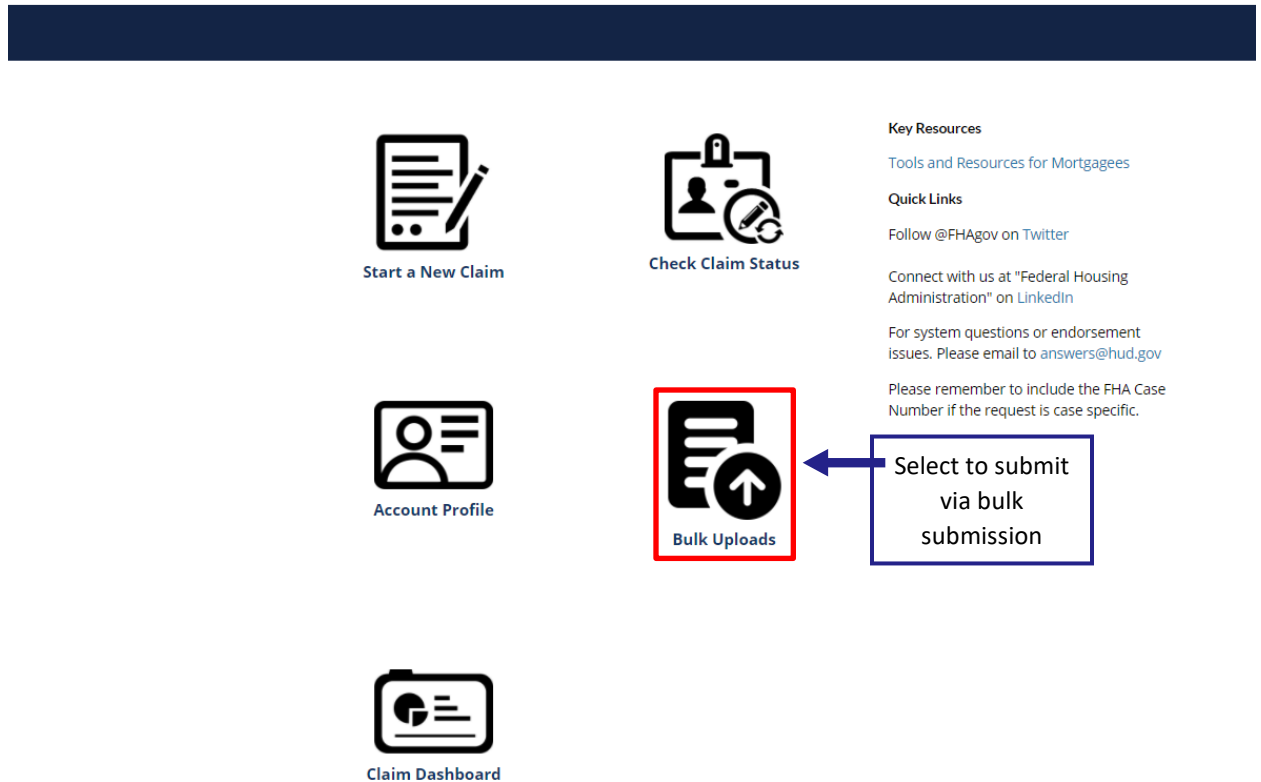
## 5. Claim Entry and Submission – Bulk

### 5.1 Submitting a Claim

**i** After logging in, users will be directed to the *FHA Catalyst*: Claims Module Home Page.

1.

**CATALYST**



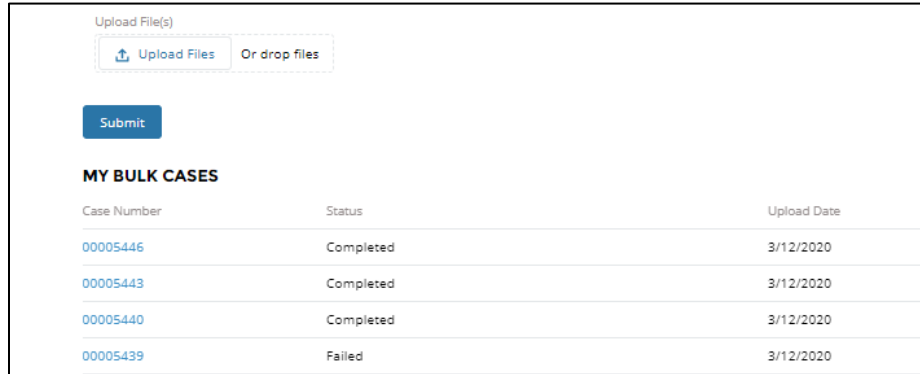
To submit a new claim via bulk submission, select **Bulk Uploads**.

**Figure 26: Bulk Submission**

2. From here, users will be directed to the Bulk Page, which includes an option to upload new bulk cases and a view of previous bulk cases.

**⚠** The case status will vary based on where the case is in the upload process. Please navigate to Appendix A for definitions of each status.

**⚠** Note: this status is the XML file validation only and does not guarantee processing of the individual FHA Case Numbers within the bulk case.



Upload File(s)

[Upload Files](#) Or drop files

**Submit**

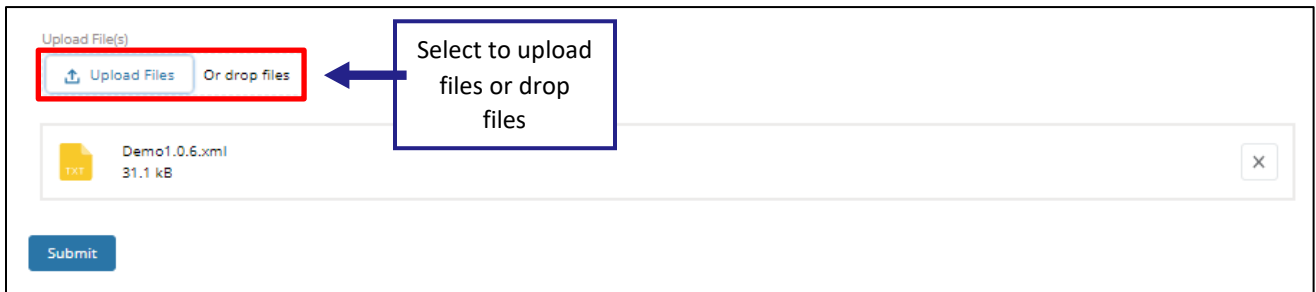
**MY BULK CASES**

Case Number	Status	Upload Date
00005446	Completed	3/12/2020
00005443	Completed	3/12/2020
00005440	Completed	3/12/2020
00005439	Failed	3/12/2020

Figure 27: Bulk Cases

- In the Upload File(s) section, select **Upload Files**, open the desired XML file to upload for processing, then select **Submit** or drag and drop desired files, then select **Submit**.

**i** It may take a few minutes for the XML file to process.



Upload File(s)

[Upload Files](#) Or drop files

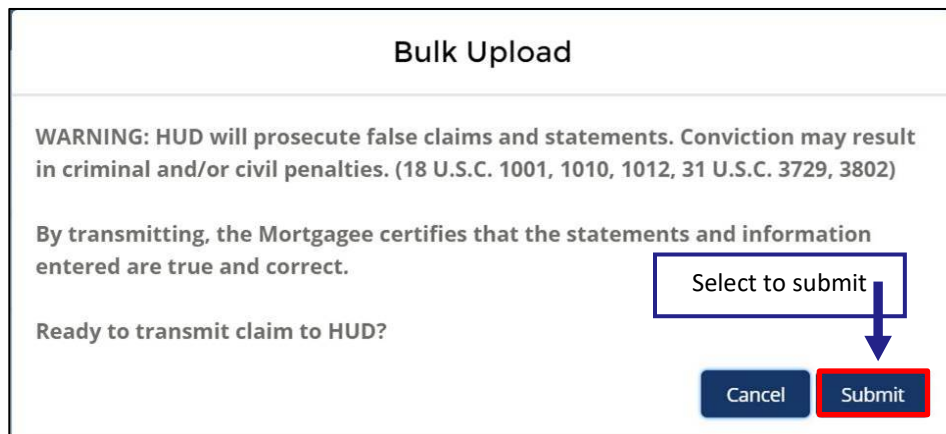
Select to upload files or drop files

Demo1.0.6.xml  
31.1 kB

**Submit**

Figure 28: XML File Upload

- After selecting **Submit**, a second prompt will open to confirm users wish to transmit the claim to HUD. Select **Submit** to complete the claim submission process or select **Cancel** to be returned to the previous Upload File(s) page.



**Bulk Upload**

**WARNING: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012, 31 U.S.C. 3729, 3802)**

By transmitting, the Mortgagee certifies that the statements and information entered are true and correct.

Ready to transmit claim to HUD?

Select to submit

**Cancel** **Submit**

Figure 29: Confirming Claim Submission





- ⚠ After submitting the XML file, users will be redirected to the case information page with high-level submission details about the XML file.
    - On the Case Information page, users can attach documents, view related claims, and see bulk XML upload errors.
  - ⚠ The case status will vary based on where the case is in the upload process. Please navigate to Appendix A for definitions of each status.
5. To view individual claims, select a case number in **Related Cases** or select the **Check Claims Status** on the home page.

Case Information	
Account Name <a href="#">Account A</a>	Case Number 00006383
Case Owner <a href="#">Test A Lender A</a>	Status Completed with Error

System Information	
Created By <a href="#">Test A Lender A</a> , 3/2/2020 2:15 PM	Processed At 3/2/2020 2:15 PM
Description Bulk Form 27011 Submission	Subject Bulk Form 27011 Submission
Case Origin	Contact Name <a href="#">Test A Lender A</a>
Priority Medium	Web Email

Upload Claim Supporting Files

Attach Documents

Related Cases (2)

Case	Status
<a href="#">00006385</a>	Failed
<a href="#">00006384</a>	Failed

[View All](#)

Error Logs (6+)

Log Entr...	Edit Code	Edit Code ...
<a href="#">I-000001...</a>	Insertion un...	Insertion un...
<a href="#">I-000001...</a>	This Servi...	This Servi...
<a href="#">I-000001...</a>	Recovery or...	Recovery or...
<a href="#">I-000001...</a>	Acceptable ...	Acceptable ...
<a href="#">I-000001...</a>	Schedule of ...	Schedule of ...
<a href="#">I-000001...</a>	Mortgage In...	Mortgage In...

[View All](#)

Figure 30: Case Information Page



## 5.2 Attaching Documents to Claims

1. To attach supporting documentation to claims, select the **Attach Documents** button.

**Case Information**

Account Name: Account A  
Case Owner: Test A Lender A  
Case Number: 00006364  
Status: Completed Successfully

**System Information**

Created By: API, 3/1/2020 9:44 PM  
Description: Form 27011 Submission  
Case Origin: Web  
Priority: Medium  
Contact Name: Test A Lender A  
Web Email: [redacted]

**Upload Claim Supporting Files**

Attach Documents

**Form Submissions (1)**

Form Su...	FHA Case N...	Lender Stat...
F-0004929		Submitted

View All

Figure 31: Attaching Supporting Documentation

2. Select the claim and related form section requiring document attachment, then select **Upload Files** to attach (Individual .PDF, .PNG, and .JPG files are accepted under 25 MB).

**Upload Claim Supporting Files**

Step 1: Find the desired Claim and select the Part to upload to.

**Claims**

- 999-0227333  
Suspended - Needs Lender Attention
  - Part A
  - Part B
  - Part C
  - Part D
  - Part E
- 999-0227444  
Suspended - Needs Lender Attention
  - Part A
  - Part B
  - Part C
  - Part D

Step 2: Please select or drag supporting documents to upload. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

999-0227333 - Part A (1)

Upload Files Or drop files

Sample Doc  
Mar 2, 2020 • 45KB •  
File Type: PDF

Step 3: Done for now? Click Close.

Close

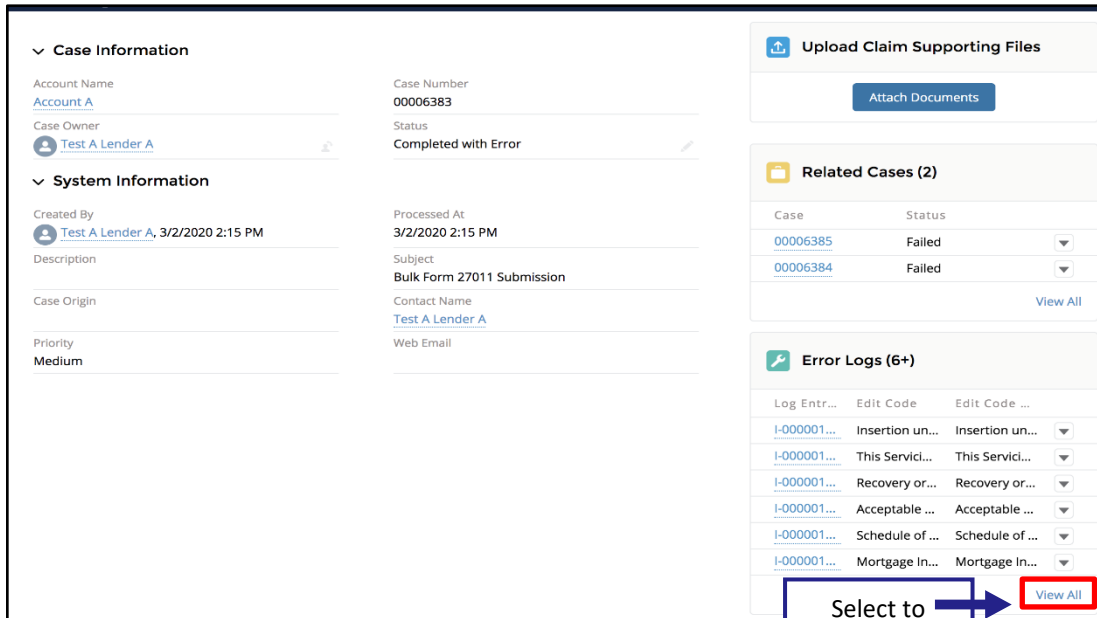
Figure 32: Uploading Supporting Documentation

3. When all supporting documentation has been uploaded, select **Close**.

- Note:** Files can only be uploaded for cases in “Draft” or “Suspended-Needs Lender Attention” status. If the claim had no errors, the status will be “Submitted”, and users do not need to upload any documentation at this time.

## 5.3 Review Bulk Submission Errors

- To review errors in bulk submission case, select **Review All** under the Error Logs.



**Case Information**

Account Name: Account A  
Case Number: 00006383  
Case Owner: Test A Lender A  
Status: Completed with Error

**System Information**

Created By: Test A Lender A, 3/2/2020 2:15 PM  
Processed At: 3/2/2020 2:15 PM  
Description: Bulk Form 27011 Submission  
Subject: Bulk Form 27011 Submission  
Case Origin: Test A Lender A  
Contact Name: Test A Lender A  
Priority: Medium  
Web Email:

**Upload Claim Supporting Files**

**Related Cases (2)**

Case	Status
00006385	Failed
00006384	Failed

**Error Logs (6+)**

Log Entr...	Edit Code	Edit Code ...
I-000001...	Insertion un...	Insertion un...
I-000001...	This Servi...	This Servi...
I-000001...	Recovery or...	Recovery or...
I-000001...	Acceptable ...	Acceptable ...
I-000001...	Schedule of ...	Schedule of ...
I-000001...	Mortgage In...	Mortgage In...

Select to view all Error Logs

Figure 33: Review Error Logs

- i** After selecting **View All**, users can view all errors associated with the uploaded submission. Selecting any of the IDs to view a more detailed description of each error.

2	I-000001403	This Servicing Mortgagee Nu...	This Servicing Mortgagee Number is not valid for your account to submit this claim.
3	I-000001404	Recovery or Estimate of Dam...	Recovery or Estimate of Damage is required if property conveyed is damaged.
4	I-000001405	Acceptable year range is bet...	Acceptable year range is between 40 years in the past through and including the next year from today.
5	I-000001406	Schedule of Tax Information ...	Schedule of Tax Information Period Covered From must be before or equal to Period Covered To.
6	I-000001407	Mortgage Insurance Premiu...	Mortgage Insurance Premiums Period Covered From must be before or equal to Period Covered To.
7	I-000001408	Mortgage Insurance Premiu...	Mortgage Insurance Premiums Period Covered From must be before or equal to Period Covered To.
8	I-000001409	This Servicing Mortgagee Nu...	This Servicing Mortgagee Number is not valid for your account to submit this claim.

Figure 34: View Error Logs

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## 6. Checking Claim Status

### 6.1 Review Claim Status

- To view a list of submitted claims, select **Check Claims Status** on the *FHA Catalyst*: Claims Module Home Page.

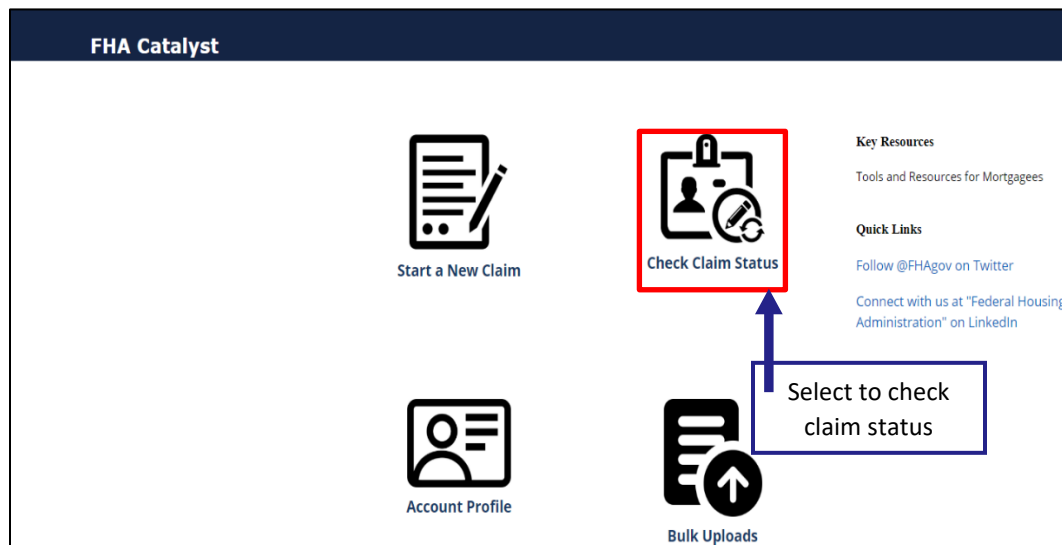


Figure 35: Check Claim Status

- ⚠ After selecting **Check Claim Status**, users can view various filtered lists of submitted claims.

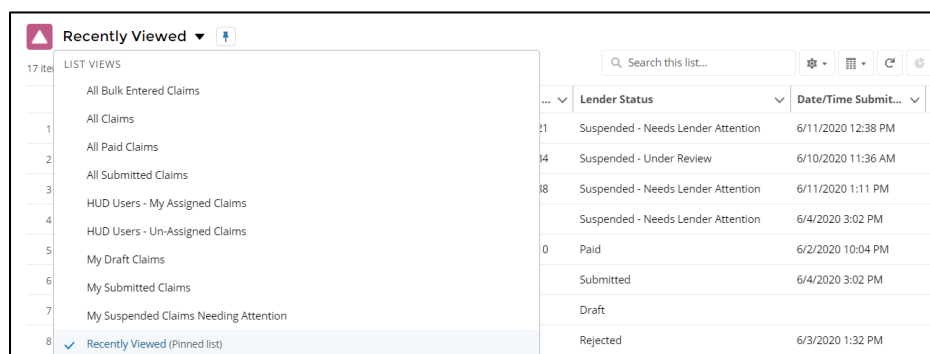


Figure 36: List Views

- ⚠ To update filter criteria, see the following:
- Select the **Dropdown** icon.
  - Select the view containing specific claims (e.g., My Submitted Claims, My Paid Claims, etc.).

- ⚠ To set a specific view as the default view for every time navigating to this page, select the **Pin** icon.

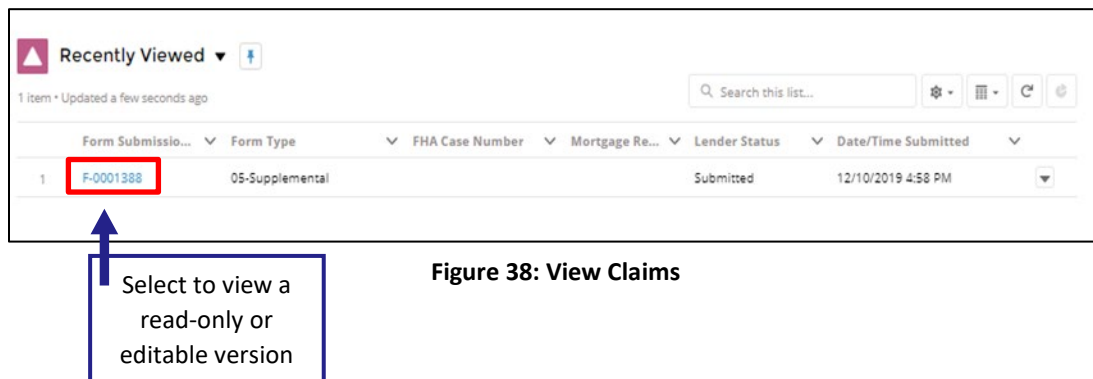


**Figure 37: Changing Filter Criteria**

- ⚠ Each filtered list shows the following information:

- Form Submission Number (Reference number)
- Form Type (e.g., '05-Supplemental)
- FHA Case Number
- Mortgagee Reference Number
- Lender Status (Paid, Submitted, Draft, etc.)
- Date/Time Submitted

- ⚠ To view a read-only version (Paid Lender Status) or an editable version (Non-Paid Lender Status) of a claim, select the **Form Submission Number**.



**Figure 38: View Claims**



## 6.2 Suspended Claim Status – Edit Codes

1. For FHA Case Numbers with Lender Statuses of either Suspended – Under Review or Suspended – Needs Lender Attention, select the **Form Submission Number**

17 items • Updated a minute ago						
Search this list...						
	Form Submission ...	Form Type	FHA Case Number	Mortgage ...	Lender Status	Date/Time Submit...
1	F-0009893	33-National Emergenc...			Suspended - Needs Lender Attention	6/11/2020 12:38 PM

Figure 39: View Claims with Edit Codes

Select to view the edit code

2. The Edit Code Section is at the top of the page.
3. Click on the Edit Codes.

**Part A - General Information**

> Edit Codes

Lender Status  
Suspended - Needs Lender Attention

Date/Time Submitted  
Date: 6/11/2020  
Time: 12:38 PM

Figure 40: Suspended Claim's Read Only View

4. The Edit Code(s) and description(s) are displayed. To correct, follow the instructions in Section 7. To close the Edit Code details, click on Edit Codes again.

**Part A - General Information**

▼ Edit Codes

Edit Code	Description
F2	<b>Title: Default Date</b> Please verify the due date of the last complete installment paid (Item 8). The date of default (2 months from the last complete installment paid) cannot be later than the current date.

Lender Status  
Suspended - Needs Lender Attention

Date/Time Submitted  
Date: 6/11/2020  
Time: 12:38 PM

Figure 41: Suspended Claim's Edit Code

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## 7. Claims Corrections

- i** A lender may submit claims corrections via single or bulk submission.
- i** Corrections are not applicable for Supplemental Claims of any status or any paid or rejected claims.

### 7.1 Single Submission Corrections

- To make a correction for single submission, select **Check Claims Status** on the *FHA Catalyst*: Claims Module Home Page.
- Select the drop down to sort by **All Claims** or **All Submitted Claims**.
- Select the form submission number.



Figure 42: Selecting Claim for Correction

- i** A read-only version of the submitted claim will appear

**Part A - General Information**

<b>Lender Status</b> Submitted	<b>Date/Time Submitted</b> <b>Date</b> 6/26/2020	<b>Time</b> 1:35 PM
<b>Submitted By/Signature</b> Lender A Tester	<b>Submitter Account</b> A Test	
<b>1. Claim Type</b> 33-National Emergency Partial Claim	<b>2. FHA Case Number</b>	

Figure 43: Read-only Version of Submitted Claim



4. Scroll to the bottom of the form to view the correction.

Figure 44: Correction

5. Select the correction to open the claim for editing.
  6. Make the necessary changes, then resubmit the claim using instructions in [Section 4.4](#).
- i** In the **Check Claims Status** on the *FHA Catalyst*: Claims Module Home Page, the new submitted information is captured.

	Form Submission Number	Form Type	FHA Case N...	Mortgage Ref...	Lender St...	Date/Time Submitted
1	<a href="#">F-0010205</a>	33-National Emergency Partial Claim			Submitted	7/7/2020 5:46 PM
2	<a href="#">F-0010189</a>	33-National Emergency Partial Claim			Submitted	6/18/2020 1:53 PM

Figure 45: Updated Claim

## 7.2 Bulk Submission Corrections

1. Enter the updated or corrected claim information into the claims processing or submission system and generate a new XML file to upload into *FHA Catalyst*.
2. Ensure the XML indicates **Yes** in the 'CORRECTED\_CLAIM' field.

- ⚠** Select the correction on the XML:

```
<FHA_CASE_NUMBER>999-0520555</FHA_CASE_NUMBER>
<FORM_TYPE>33-National Emergency Partial Claim</FORM_TYPE>
<PREVIOUS_CLAIM_TYPE/>
<CORRECTED_CLAIM>Yes</CORRECTED_CLAIM>
```

3. To upload the claim, follow step 5 in [Section 5.1](#).

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## 8. Dashboarding

### 8.1 Navigating to the Dashboard

**i** After logging in, users will be directed to the *FHA Catalyst*: Claims Module Home Page.

1. To view the Dashboard/Reports, select **Claim Dashboard**.

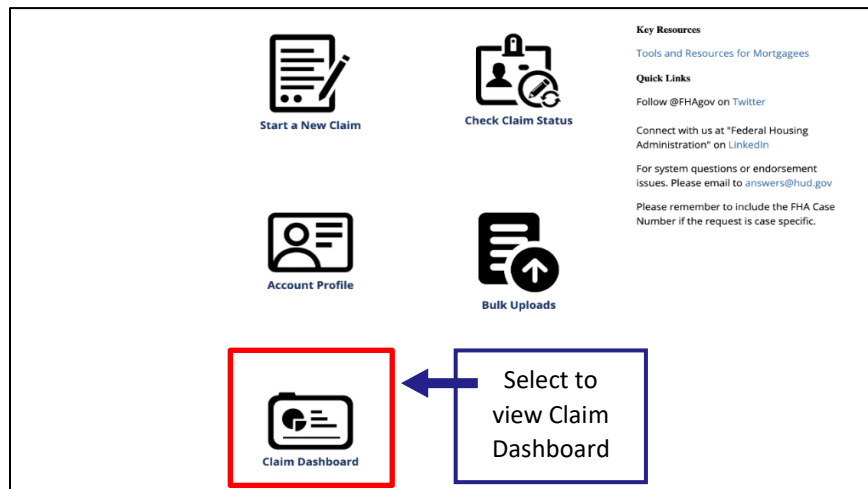


Figure 46: *FHA Catalyst* Claims Home Page

2. The page is divided into two halves: Claim Dashboard and Bulk Uploaded Cases Dashboard

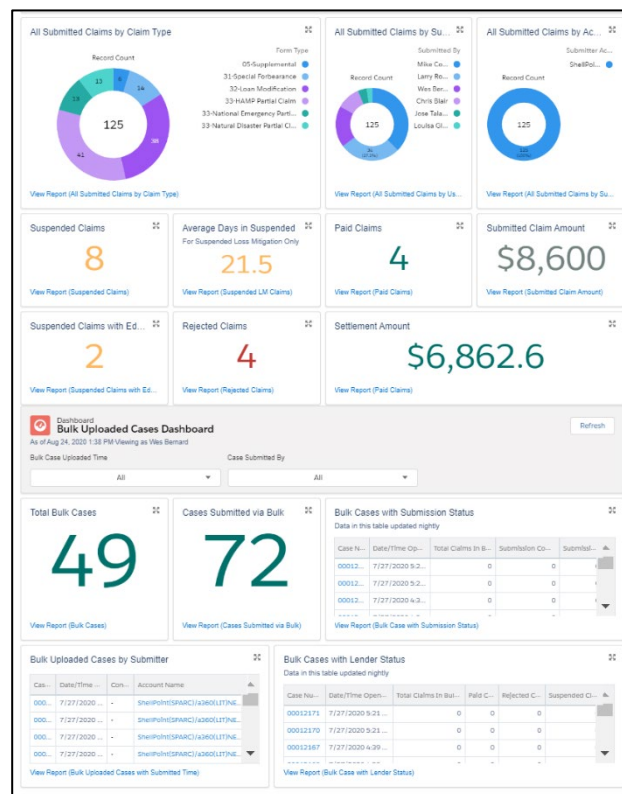
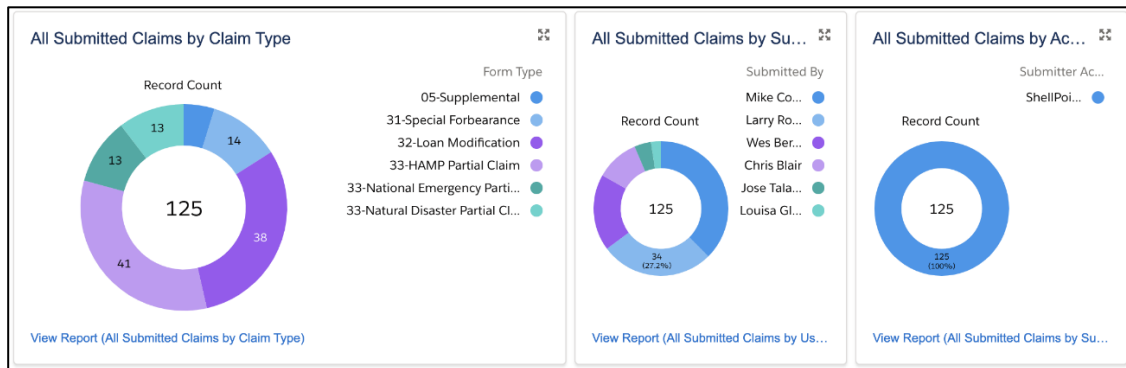


Figure 47: Claim Dashboard and Bulk Uploaded Cases Dashboard

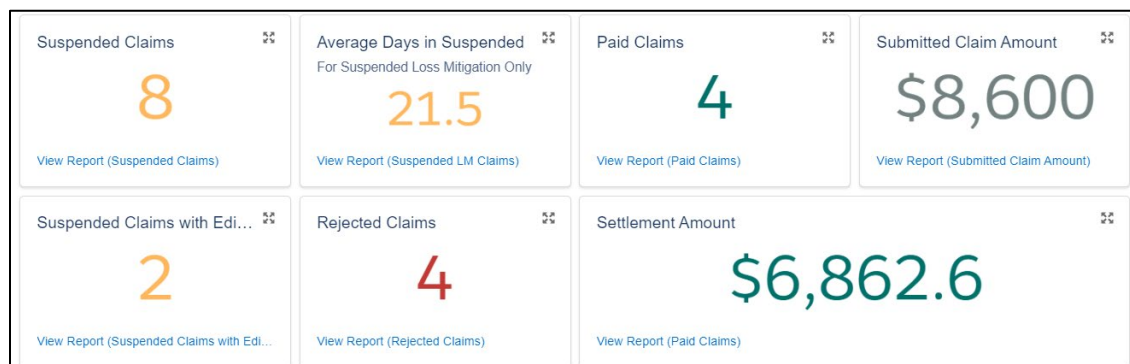
## 8.2 Claim Dashboard



The above dashboard displays the following information:

Dashboard Name	Description
All Submitted Claims by Claim Type	Number of Claim Submissions By Claim Type
All Submitted Claims by Submitter	Number of Claim Submissions By Claim Submitter
All Submitted Claims by Accounts	Number of Claim Submissions By Submitter Account

Figure 48: Claim Dashboard – Circle Charts



The above dashboard displays the following information:

Dashboard Name	Description
Suspended Claims	Number of Claims with a Suspended Lender Status
Average Days in Suspended Status	Average Number of Days Loss Mitigation Claims remained in the Suspended Lender Status
Paid Claims	Number of Claims with a Paid Lender Status
Submitted Claim Amount	Each Paid Claim with the Requested Net Claim Amount
Settlement Amount	Each Paid Claim with the Actual Settlement Amount
Rejected Claims	Number of Claims with a Rejected Lender Status

Figure 49: Claim Dashboard - Metric Chart

Click Refresh to update the dashboards (only once per minute)



Figure 50: Refresh the Claim Dashboard

## 8.3 Filtering the Claim Dashboard

1. Select **All** under Claim Submitted Time to filter/change the frequency for all dashboards.

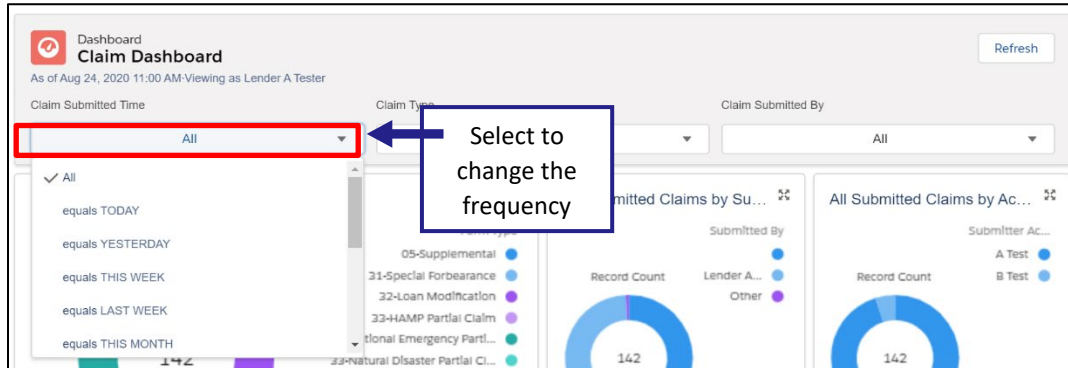


Figure 51: Claim Submitted Time

2. Select **All** under Claim Type to filter/change the claim types for all dashboards

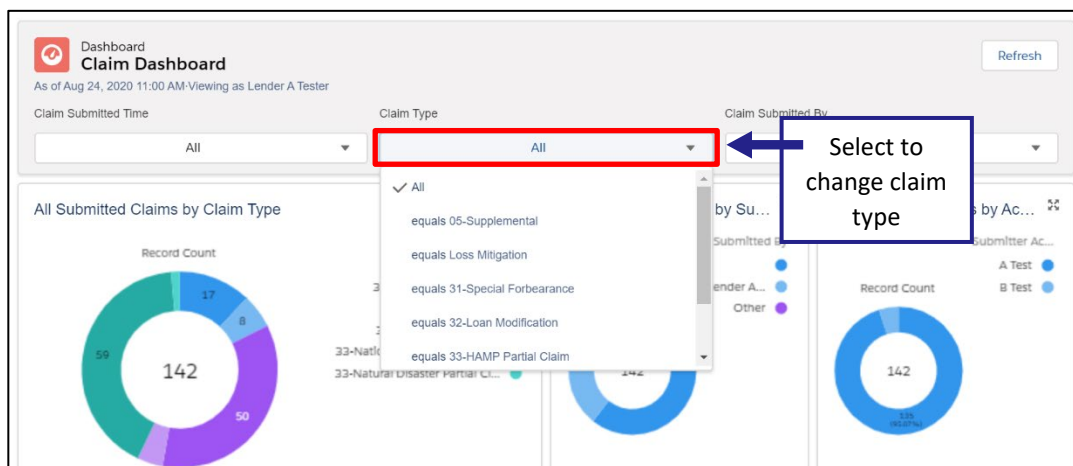


Figure 52: Claim Type

3. Select **All** under Claim Submitted by to filter/change claims submitted by users or only self.

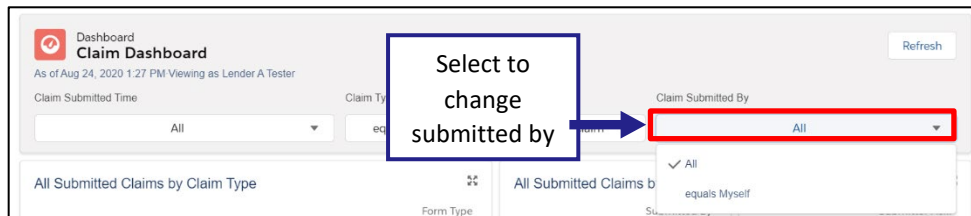
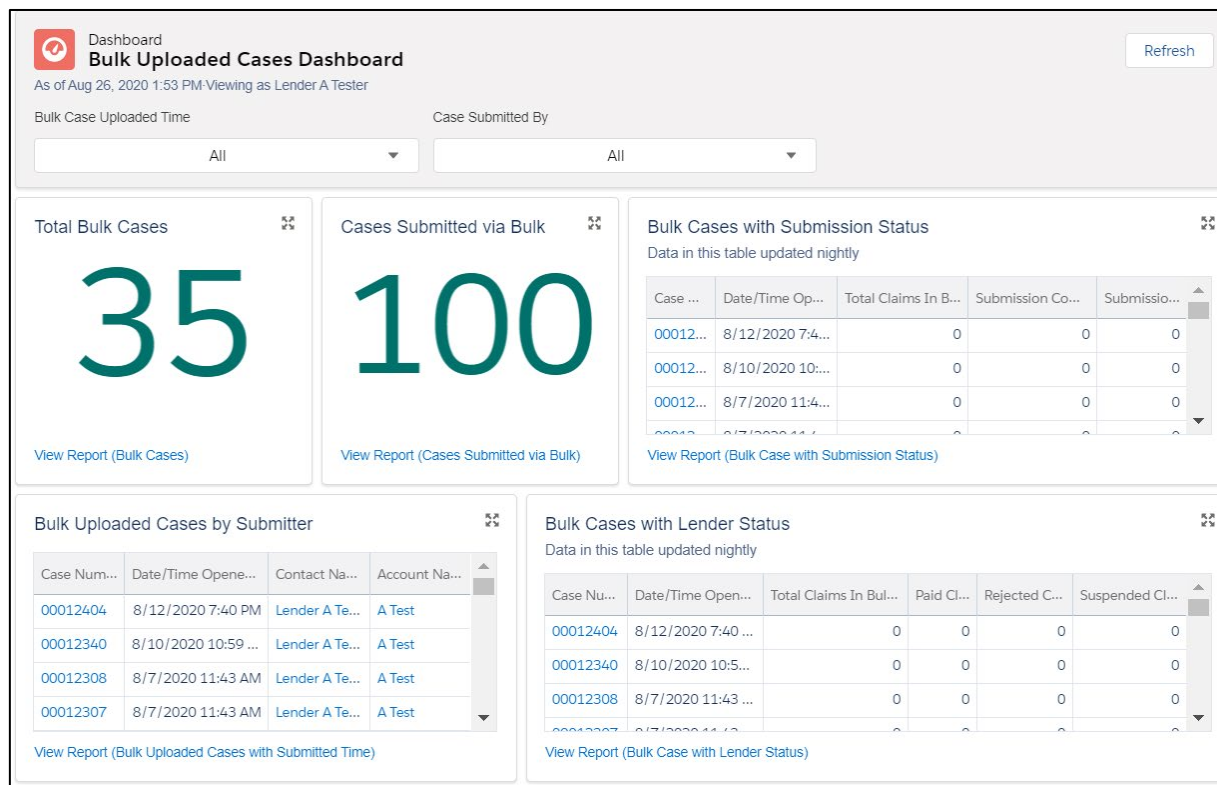


Figure 53: Claim Submitted By



## 8.4 Bulk Uploaded Cases Dashboard



**i** The Bulk Uploaded Cases Dashboard displays the following information:

Dashboard Name	Description
Total Bulk Cases	Number of Bulk Cases Submitted
Cases Submitted via Bulk	Number of FHA Case Numbers Submitted via a Bulk Case
Bulk Cases with Submission Status	Bulk Case Summary with the Submission Statuses Count
Bulk Cases with Lender Status	Bulk Case Summary with the Lender Statuses Count
Bulk Uploaded Cases by Submitter	Bulk Cases Submitted by the Submitter Name and Account

**Figure 54: Bulk Uploaded Cases Dashboard**

## 8.5 Filtering the Bulk Uploaded Cases Dashboard

1. Select **All** under Bulk Case Uploaded Time to filter/change the frequency for the dashboard.

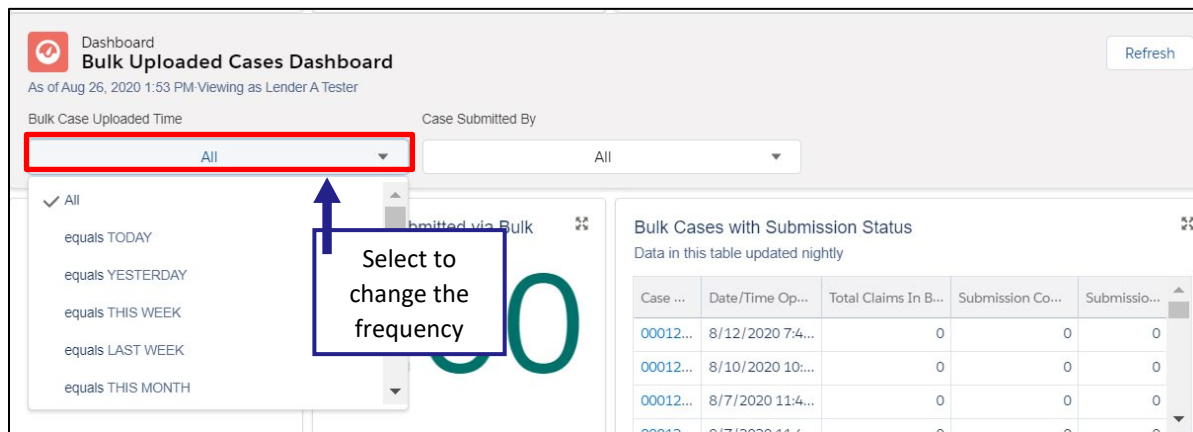


Figure 55: Cases Uploaded Frequency

2. Select **All** under Case Submitted By to filter/change claims submitted by users or only self.

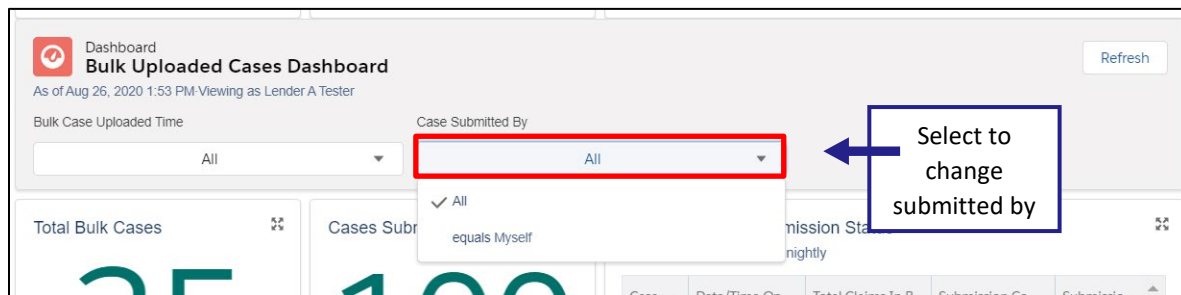


Figure 56: Cases Submitted By

## 8.6 Expanding and Exporting Dashboards

1. To expand a dashboard, select the **four arrows** icon in the top right corner.

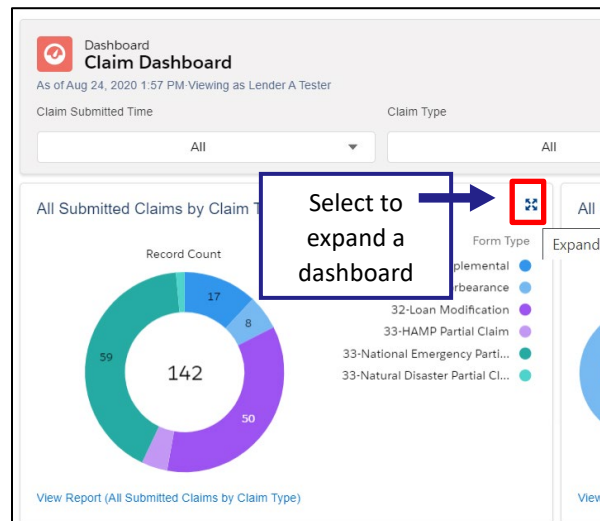


Figure 57: Expanding a Dashboard

2. Once expanded, select the **download** icon in the top right corner to export.

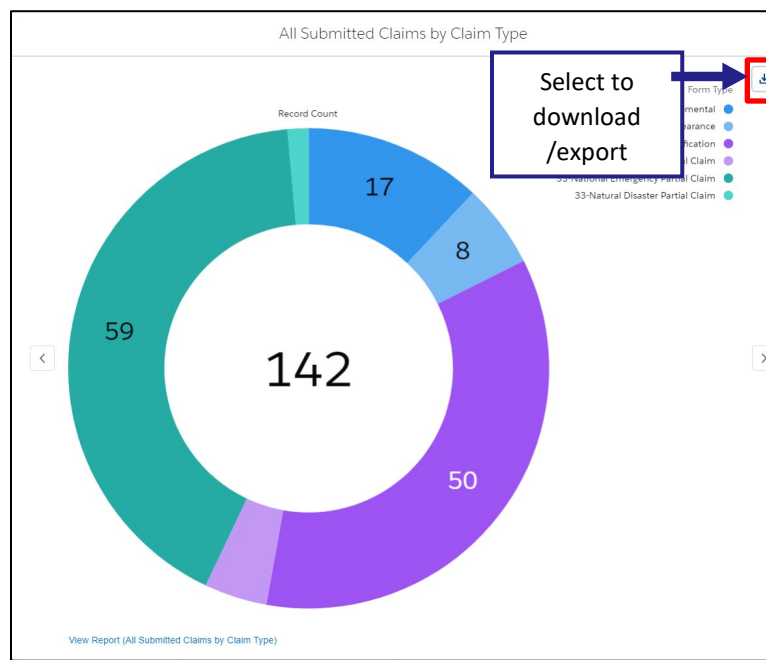


Figure 58: Exporting a Dashboard

- i** The chart can now be emailed or pasted into a PowerPoint presentation.

3. Select the **white arrow** to return to the dashboard home page.

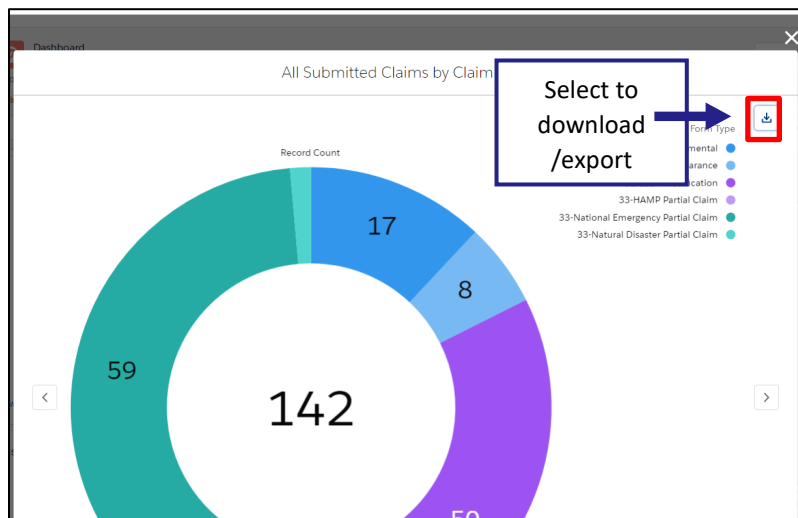


Figure 59: Return to Dashboard Home Page

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## 9. Reporting

### 9.1 Managing Custom Reports

1. Select **Manage Custom Reports** to view all reports.



Figure 60: Viewing All Report

- i** Reports can be filtered by most recently viewed reports.

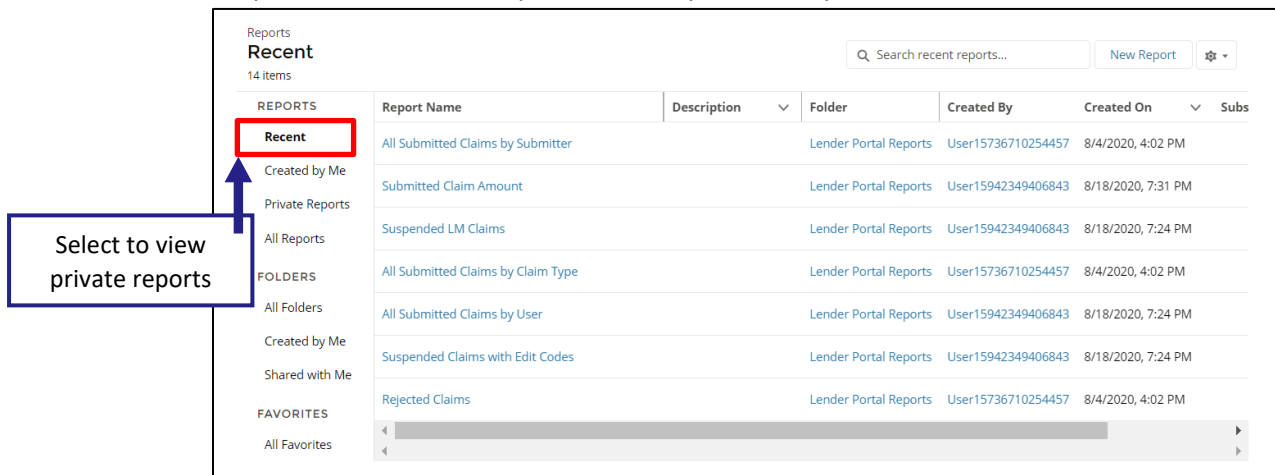


Figure 61: Most Recent Reports

- i** Reports saved in the Private folder can be viewed by selecting **Private Reports**.

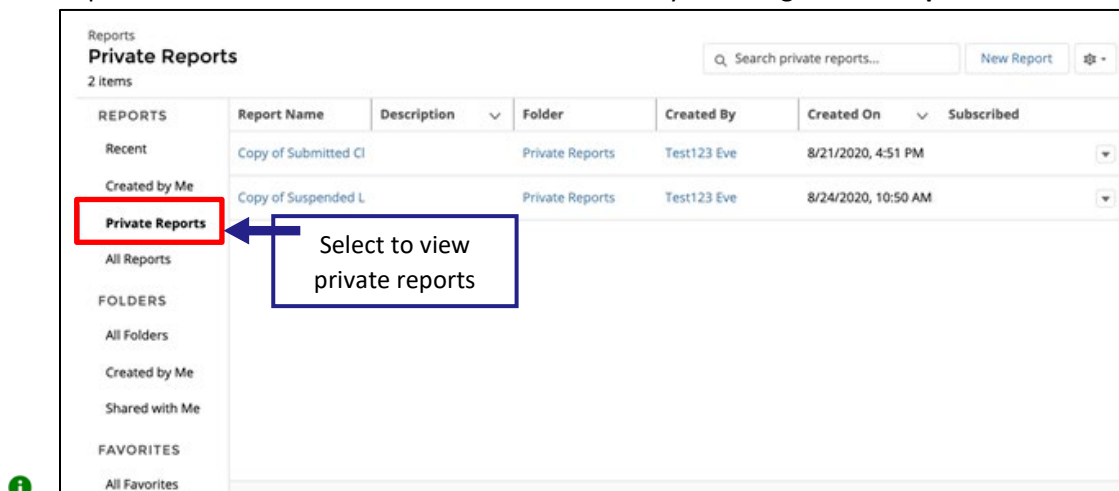
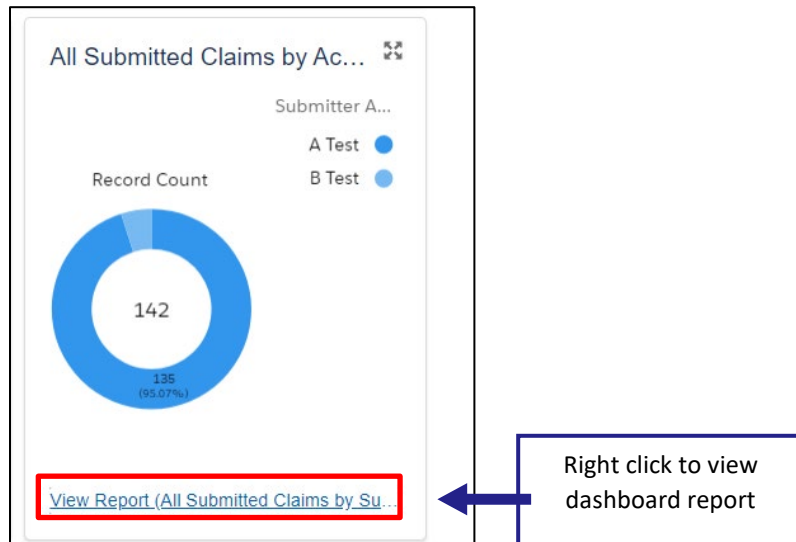


Figure 62: Viewing Private Reports

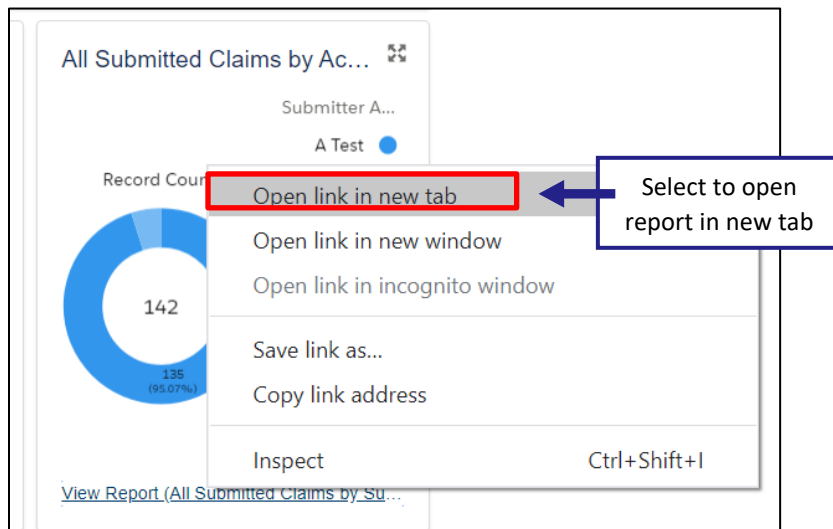


- To access the details of a dashboard in a report, right click **View Report** below the desired dashboard.



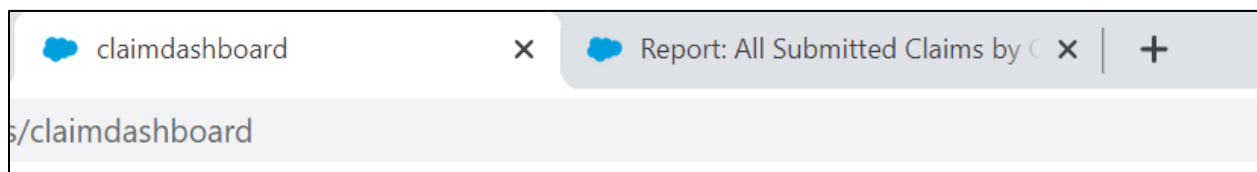
**Figure 63: Viewing Dashboard Reports**

- Then, select **Open link in new tab**.



**Figure 64: Opening Report in New Tab**

- ⚠ The report will open in a new tab Titled “Report: [Name of Report]”.



**Figure 65: Report in New Tab**



#### 4. The Report is viewable.

Submitter Account	Form Submission: Form Submission Number	FHA Case Number	Form Type	Date/Time Submitted	Submitted By
A Test (135)	F-0010732		33-National Emergency Partial Claim	8/7/2020 11:43 AM	Lender A Test
	F-0010682		32-Loan Modification	7/30/2020 1:39 PM	Lender A Test
	F-0010683		33-National Emergency Partial Claim	7/30/2020 1:39 PM	Lender A Test
	F-0010675		32-Loan Modification	7/30/2020 1:05 PM	Lender A Test
	F-0010676		33-National Emergency Partial Claim	7/30/2020 1:05 PM	Lender A Test
	F-0010582		31-Special Forbearance	7/16/2020 4:28 PM	Lender A Test
	F-0010190		05-Supplemental	7/13/2020 2:56 PM	Lender A Test
	F-0010571		32-Loan Modification	7/13/2020 1:09 PM	Lender A Test
	F-0010572		33-National Emergency Partial Claim	7/13/2020 1:09 PM	Lender A Test
	F-0010204		32-Loan Modification	7/13/2020 1:01 PM	Lender A Test
	F-0010205		33-National Emergency Partial Claim	7/7/2020 5:46 PM	Lender A Test
	F-0010203		05-Supplemental	6/26/2020 1:47 PM	Lender A Test
	F-0010197		05-Supplemental	6/23/2020 3:58 PM	Lender A Test
	F-0010198		32-Loan Modification	6/23/2020 3:50 PM	Lender A Test

Figure 66: Dashboard Report

## 9.2 Saving a Report

1. To save a report, select the **dropdown arrow** in the top right corner of the report, then select **Save As**.

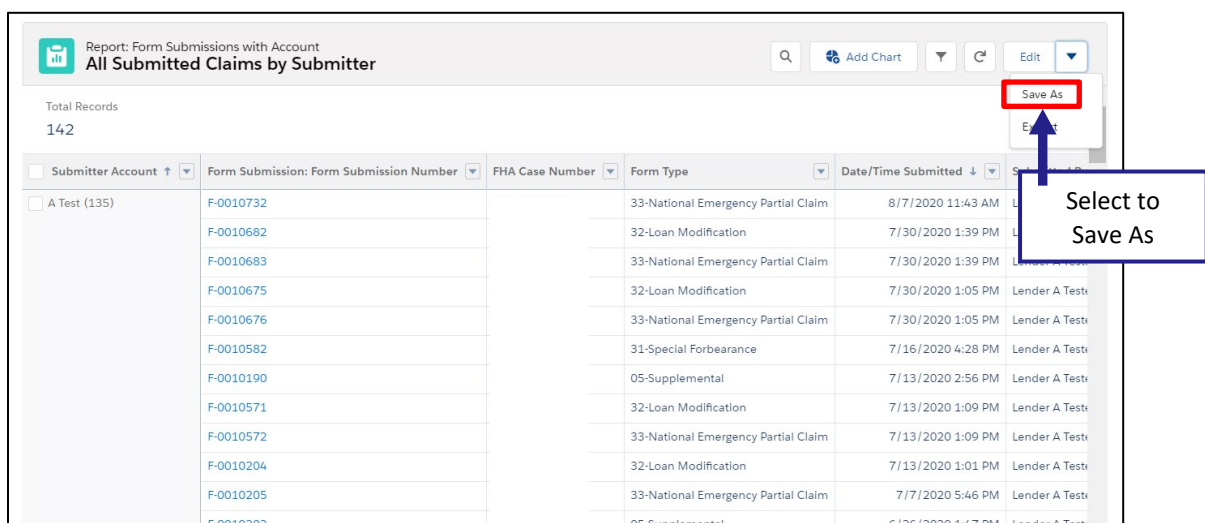


Figure 67: Saving a Report



2. Insert Report Name, Report Unique Name, and select **Select Folder** to choose where to save the report.
3. Then, select **Save**.

Report: Form Submissions with Account  
All Submitted Claims by Submitter

Total Records  
142

Submitter Account  
A Test (135)

Save Report As

\* Report Name  
Copy of All Submitted Claims by Submitter

Report Unique Name  
My\_Copy\_of\_All\_Submitted\_by\_Submitter\_82420

Report Description

Folder  
Private Reports

Select Folder

Cancel Save

Figure 68: Saving a Report

### 9.3 Exporting a report

1. To export a report, select the **dropdown arrow** in the top right corner of the report, then select **Export**.

Report: Form Submissions with Account  
All Submitted Claims by Submitter

Total Records  
142

Submitter Account  
A Test (135)

Form Submission: Form Submission Number

F-0010732  
F-0010682  
F-0010683  
F-0010675  
F-0010676  
F-0010582  
F-0010190  
F-0010571  
F-0010572  
F-0010204  
F-0010205  
F-0010203

FHA Case Number

Form Type

33-National Emergency Partial Claim  
32-Loan Modification  
33-National Emergency Partial Claim  
32-Loan Modification  
33-National Emergency Partial Claim  
31-Special Forbearance  
05-Supplemental  
32-Loan Modification  
33-National Emergency Partial Claim  
32-Loan Modification  
33-National Emergency Partial Claim  
05-Supplemental

Date/Time Submitted

8/7/2020 11:43 AM  
7/30/2020 1:39 PM  
7/30/2020 1:39 PM  
7/30/2020 1:05 PM  
7/30/2020 1:05 PM  
7/16/2020 4:28 PM  
7/13/2020 2:56 PM  
7/13/2020 1:09 PM  
7/13/2020 1:09 PM  
7/13/2020 1:01 PM  
7/7/2020 5:46 PM  
6/26/2020 1:47 PM

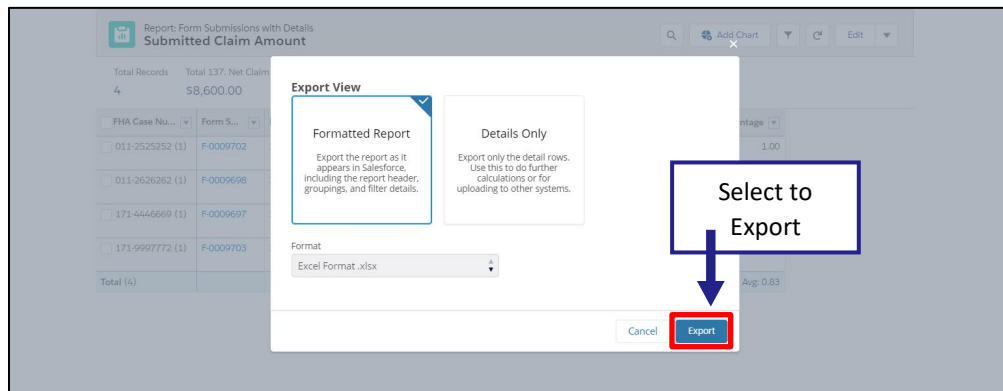
Submitted By  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test  
Lender A Test

Save As  
Export

Select to Export

Figure 69: Exporting a Report

2. Select **Formatted Report**, then select **Export**.



**Figure 70: Exporting a Report**

**i** Open the downloaded file to view your report in Excel format.

FHA Case Number	Form Submission Number	Form Type	Date/Time Submitted	137. Net Claim Amount	Submitted By	Settlement Amount	Percentage
	F-0009702	31-Special Forbearance	6/2/2020 10:04 PM	\$100.00	FirstName LastName	\$100.00	1
	F-0009698	33-Natural Disaster Partial Claim	6/2/2020 10:04 PM	\$2,500.00	FirstName LastName	\$762.60	0.31
	F-0009697	33-HAMP Partial Claim	6/2/2020 10:04 PM	\$5,000.00	FirstName LastName	\$5,000.00	1
	F-0009703	32-Loan Modification	6/2/2020 10:04 PM	\$1,000.00	FirstName LastName	\$1,000.00	1
<b>Total</b>	<b>Sum</b>			<b>\$8,600.00</b>		<b>\$6,862.60</b>	
	<b>Avg</b>						<b>0.8275</b>
	<b>Count</b>	<b>4</b>					

**Figure 71: Report in Excel**

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## 10. Getting Help

For further assistance, please contact the FHA Resource Center:

- E-mail: [answers@hud.gov](mailto:answers@hud.gov).
- Call 1-800-CALLFHA (1-800-225-5342). Persons with hearing or speech impairments may reach this number by calling the Federal Information Relay Service at 1-800-877-8339.
- Emails and phone messages will be responded to during normal hours of operation, 8:00 AM to 8:00 PM (Eastern), Monday through Friday on all non-Federal holidays.

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## 11. Appendix

### 11.1 Appendix A – Bulk Case Status Definitions

Bulk Case Status	Definition / Next Steps
New	Still in queue to be processed. <b>Wait for system to process claim(s).</b>
Uploaded	Claims are uploaded. <b>Wait for system to process claim(s).</b>
In Progress / In Validation	Claims are being validated for data quality. <b>Wait for system to process claim(s).</b>
Failed	The XML that was uploaded is invalid. <b>Read attached Error Logs and resubmit XML file after making corrections.</b>
Completed Successfully	All claims in the attached XML file were uploaded successfully. <b>Begin uploading supporting documentation.</b>
Completed with Error	Some claims in the attached XML file have data quality errors. <b>Read attached Error Logs and resolve individual claim errors. Upload supporting documentation for successfully uploaded claims.</b>

Table 1: Bulk Upload Status

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