



FHA Catalyst: **Claims Module** **Single Family** **Forward Claims** **User Guide**

U.S. Department of Housing and Urban Development

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Solution Information

	Information
Solution Name	<i>HUD Claims Portal</i>
Solution Acronym	<i>CM or FHA Catalyst</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
7.0	03/05/2021	Development Contractor	View HUD Comments Field in Claim; View AOP; Add Bulk Case Status Definition; Add Default Lender Statuses after Submission; Add Correction Button and Scenarios



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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, ask system questions, or address endorsement issues with FHA Case Number by contacting the FHA Resource Center at 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**.

A screenshot of the FHA Catalyst login page. The page has a dark blue header with the "FHA CATALYST" logo. Below the header are two input fields for "Username" and "Password". There are checkboxes for "Remember Me" and a "Forgot Password" link. A blue "Login" button is positioned below the password field. A red warning message states: "Warning! By accessing this system, you agree to the Rules of Behavior for this system and are bound by the following Terms and Conditions:". Below the warning is a block of small text detailing system security and monitoring policies.

Figure 1: Login Page



2.3 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

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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**.

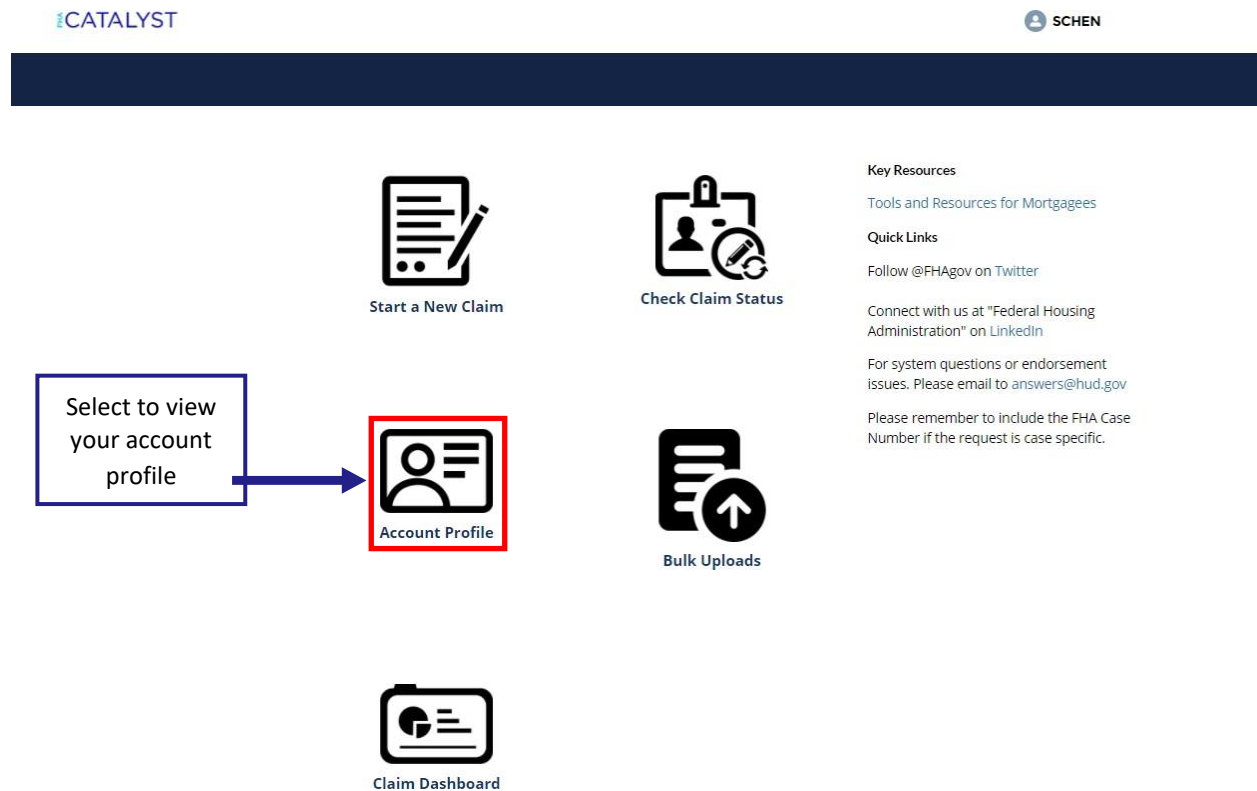


Figure 4: *FHA Catalyst*

3.2 Updating Your Account Profile

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

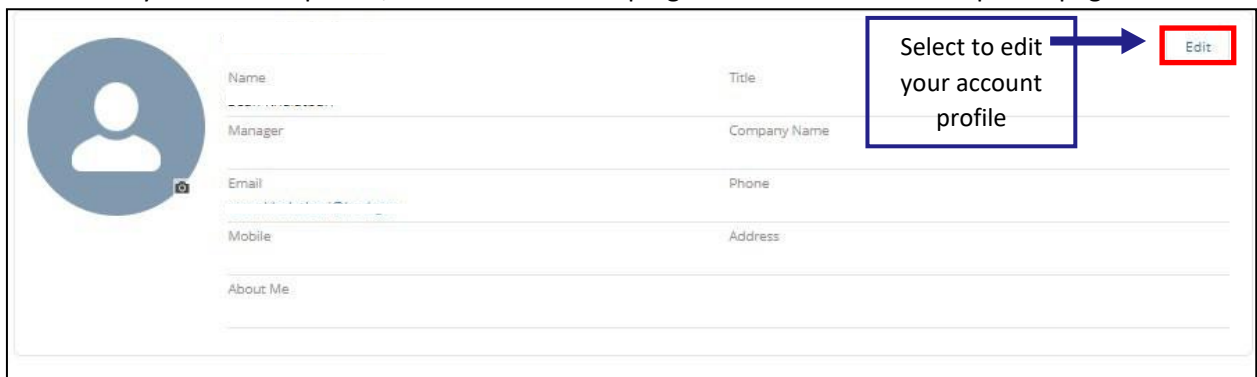


Figure 5: Edit Your Account Profile



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

⚠ Required fields are denoted with a red asterisk.

The screenshot shows a web form titled "Edit User". It is divided into two main sections: "About" and "Contact".

About Section:

- * Name:** Includes input fields for "First Name", "Middle Name", and "* Last Name".
- Title:** A text input field.
- Suffix:** A text input field.
- Manager:** A text input field.
- Company Name:** A text input field.

Contact Section:

- * Email:** A text input field containing "you@example.com". Below it, the text "Complete this field." is displayed in red.
- Phone:** A text input field.
- Address:** Includes a "Street" text input field.
- Mobile:** A text input field.

At the bottom right of the form, there are two buttons: "Cancel" and "Save". A blue-bordered callout box points to the "Save" button with the text: "Select to save changes made to your account profile".

Figure 6: Update Your Account Profile

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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**.

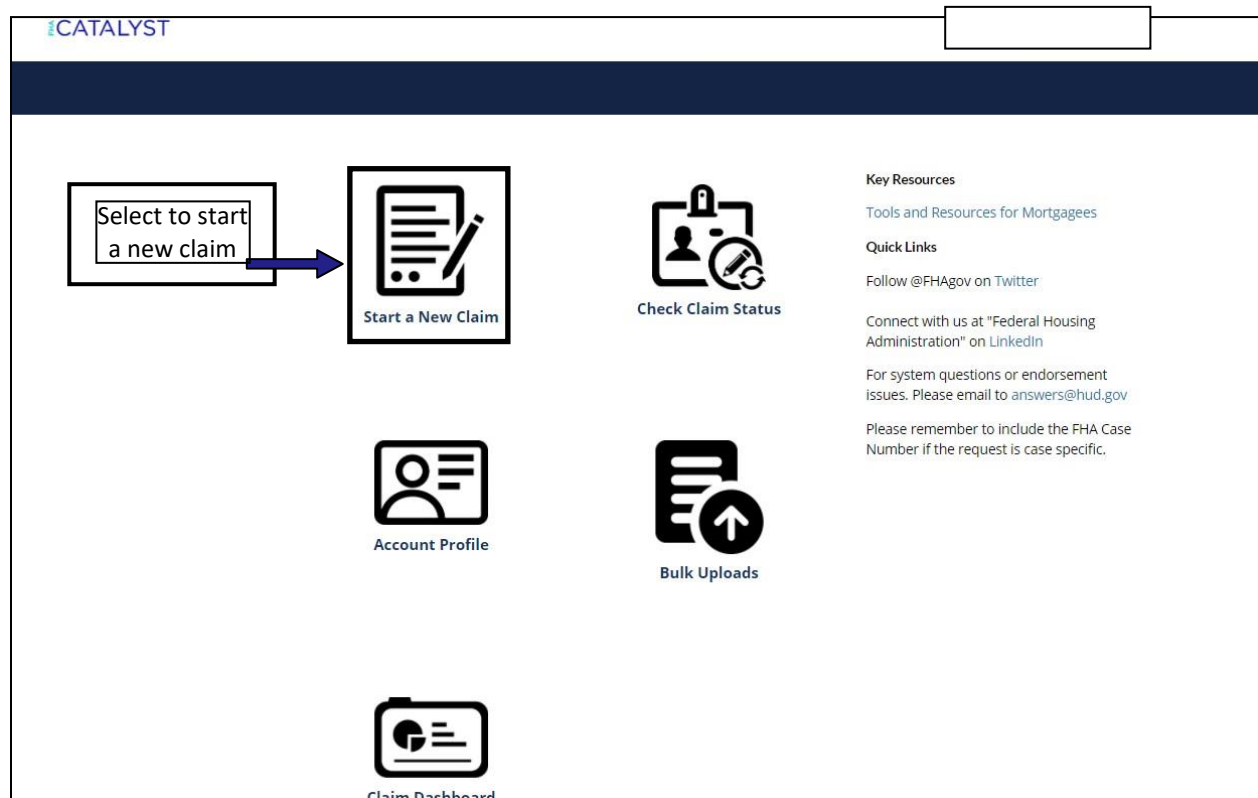


Figure 7: FHA Catalyst: Claims Module Home Page

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 ensure timely processing of this claim submission.

Select the claim type

Enter the claim FHA Case Number

* 1. Claim Type
05-Supplemental

* 2. FHA Case Number

Submission Exception
--Select--

* Previous Claim Type
(

If applicable, select the submission exception

Select the previous claim type

Select to save and continue

Save & Next

Figure 8: Claim Initiation Page Fields

NOTE: Lenders can selection one of the claim types from the Claim Type drop down list.

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Claim Initiation

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

* 1. Claim Type
--Select--
--Select--
01A - Conveyance - Part A
01B - Conveyance - Part B
02-Assignment
05-Supplemental
06 - Claims Without Conveyance of Title (CWCOT)
07 - Pre-Foreclosure Sale (PFS)
11A - Reacquisition - Part A
11AB - Reacquisition - Parts A/B
31-Special Forbearance
32-Loan Modification
33-HAMP Partial Claim
33-National Emergency Partial Claim
33-Natural Disaster Partial Claim
41A - Replacement Conveyance Part A
41B - Replacement Conveyance Part B
46 - Replacement Claims Without Conveyance of Title (CWCOT)
47 - Replacement Pre-Foreclosure Sale (PFS)

* 2. FHA Case Number

Previous Claim Type
--Select--

Save & Next

Figure 9: Claim Initiation Page with 17 Claim Type Selection

Default Lender Status = Suspended – Under Review when Lenders submitted below Claim Types:

- 11A-Reacquisition – Part A
- 11AB – Reacquisition – Parts A/B
- 41A-Replacement Conveyance Part A



-
- 41B-Replacement Conveyance Part B
 - 46-Replacement Claims Without Conveyance of Title (CWCOT)
 - 47-Replacement Pre-Foreclosure Sale (PFS)

Default Lender Status = Submitted when Lenders submitted below Claim Types:

- 02-Assignment
- 01A-Conveyance-Part A
- 01B-Conveyance-Part B
- 05-Supplemental
- 31-Special Forbearance
- 32-Loan Modification
- 33-HAMP Partial Claim
- 33-National Emergency Partial Claim
- 33-Natural Disaster Partial Claim
- 06-Claims Without Conveyance of Title (CWCOT)
- 07-Pre-Foreclosure Sale (PFS)

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
3. Section of the Act Code <input type="text"/>	* 5. Endorsement Date (from MIC) <input type="text" value="5/5/2000"/>
7a. Due Date of First Payment to Principal and Interest: Original <input type="text"/>	7b. Due Date of First Payment to Principal and Interest: Modified <input type="text"/>
8. Due Date Last Complete Installment Paid <input type="text"/>	9. Date of Possession and Acquisition of Marketable Title <input type="text"/>
10. Date Deed or Assignment Filed for Record or Date of Closing or Appraisal <input type="text"/>	
11. Foreclosure Proceedings <input type="radio"/> a. Instituted <input type="radio"/> b. Date of Deed in Lieu	
* 12. Holding Mortgagee Number (Payee) (10 digits) <input type="text" value="9999599995"/>	* 13. Servicing Mortgagee Number (10 digits) <input type="text"/>
14. Mortgagee Reference Number (maximum of 15 digits) <input type="text"/>	* 15a. Mortgage Amount: Original <input type="text"/>

Figure 10: Part A – General Information

- At the bottom of each page, there’s an area to add mortgagee’s comments, if any
- 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 Home Page* without saving.

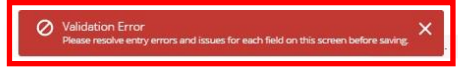
<input type="text" value="Mortgagee's Comments, If Any"/>	Select to navigate through the site
Enter Mortgagee Comment	<input type="button" value="Previous"/> <input type="button" value="Save & Next"/> <input type="button" value="Save & Close"/> <input type="button" value="Cancel"/>

Figure 10: Mortgage Comments and Navigation Buttons



i 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



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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) <input type="text"/> Complete this field.
7a. Due Date of First Payment to Principal and Interest: Original <input type="text"/>	7b. Due Date of First Payment to Principal and Interest: Modified <input type="text"/>
8. Due Date Last Complete Installment Paid <input type="text"/>	9. Date of Possession and Acquisition of Marketable Title <input type="text"/>
10. Date Deed or Assignment Filed for Record or Date of Closing or Appraisal <input type="text"/>	
11. Foreclosure Proceedings <input type="radio"/> a. Instituted <input type="radio"/> b. Date of Deed in Lieu Clear	
*12. Holding Mortgage Number (Payee) (10 digits) <input type="text"/> <small>Must be numeric and exactly 10 digits</small>	*13. Servicing Mortgage Number (10 digits) <input type="text"/> <small>Must be numeric and exactly 10 digits, and must be valid for your account</small>
14. Mortgage Reference Number (maximum of 15 digits) <input type="text"/>	*15a. Mortgage Amount: Original <input type="text"/> <small>Complete this field.</small>

Figure 11: Validation Errors



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

The screenshot shows a form titled "32. Schedule of Tax Information" with several required 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, and *32g. Date Paid. A blue button labeled "Add 32. Schedule of Tax Information" is located at the bottom left. A callout box with a black border and white background contains the text "Select to add an additional tax information section" with a blue arrow pointing down to the "Add" button.

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 for '32. Schedule of Tax Information'. The top form is partially filled with data. The bottom form is empty, with a red border around the '32a. Tax Year' field. A blue box with a white arrow points to a trash can icon in the top right corner of the bottom form, with the text 'Select to remove a repeater'.

Figure 13: Removing Repeaters

4.3 Attaching Files 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

- 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.
- Once the files have been attached, select **Done** to upload it to the page.

Upload Files

Test.pdf 39 KB Select to upload files Done

1 of 1 file uploaded

Figure 15: Attaching Supporting Documentation

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

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 \$*
Add New Item				

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) Or drop files

Mortgagee's Comments, If Any

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

Figure 17: Part C Screen



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

CATALYST Form Saved Your form was saved successfully. Search... SCHEN

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Part D - Support Document

300. FHA Case Number [Redacted] 302. Mortgagee's reference number [Redacted]

303. Debenture Interest Rate [Redacted]

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 *	Description *	Amount Paid \$ *	Debenture Interest \$ *
Add New Item			

306. Attorney/Trustee Fees

Date Paid *	Type *	Description *	Amount Paid \$ *	Debenture Interest \$ *
Add New Item				

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

Date Paid *	Description *	Amount Paid \$ *	Debenture Interest \$ *
Add New Item			

308. Taxes on Deed

Date Paid *	Type *	To Mortgagee *	To HUD *	Amount Paid \$ *	Debenture Interest \$ *
Add New Item					

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

Date Paid *	Date Lien Attached *	Description *	Amount Paid \$ *	Debenture Interest \$ *
Add New Item				

310. Bankruptcy

Date Paid *	Description *	Amount Paid \$ *	Debenture Interest \$ *
Add New Item			

311. Mortgage Insurance Premiums

Date Paid *	Period Covered From *	Period Covered To *	Amount Paid \$ *	Debenture Interest \$ *
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 [Redacted]

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

Figure 18: Part D Screen



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

CATALYST Form Saved
Your form was saved successfully. SCHEN

OMB Approval No. 2502-0589 (Exp. 8/31/2023)

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.

[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. FHR Case Number: 125-112-2506
 103. Mortgage'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/Bid or Appraisal Value (for Coinsurance or Nonconveyance)	[]	[]	[]
109	Escrow Balance (as of date in Item 10, Part A - Date deed or assignment filed for record or date of closing or appraisal)	[]	[]	[]
110	Total Disbursements for Protection and Preservation (from line 264, 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
115	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 Deed (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 Nonconveyance 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 B - A + C) = \$0.00		



***Mortgagee Contact Name**
T.d. Apt. 123 Mcdonald's #

***Mortgagee Contact Telephone** **Mortgagee Contact Phone Extension**
222-333-4444 1234

Mortgagee Contact Email
test@mortgageecontact.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.

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

testing.jpeg Feb 23, 2021 · 15KB · File Type: JPG	↓ 🗑	testing Feb 16, 2021 · 30KB · File Type: PDF	↓ 🗑
testing Feb 16, 2021 · 30KB · File Type: PDF	↓ 🗑	testing Feb 16, 2021 · 30KB · File Type: PDF	↓ 🗑

[ViewAll](#)

Mortgagee's Comments, If Any

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

Figure 20: Part B Screens

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 Only 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.**

THE CATALYST

OMB Approval No. 2502-0589 (Exp. 8/31/2023)

Part A - General Information

Lender Status Paid	Date/Time Submitted Date 11/23/2020	Time 5:25 PM
Submitted By/Signature 	Submitter Account Test Claims C Account	2. FHA Case Number 123-1123506
1. Claim Type 05-Supplemental		

Figure 23: Lender Status



Tips: Lenders can be back to the all claims list view to check claim status by clicking Done button from the read only page view. Lenders can click FHA Catalyst Logo to be back on the FHA Catalyst Claims Module

Mortgagee's Comments, If Any

HUD Comments, If Any

FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.

Warning: Submissions made after 8 PM Eastern may not be processed until the following night.

[Correction](#) [Done](#)

Figure 24: Done Button on Read Only Page

FHA CATALYST

All Claims

50+ 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 Referen...	Lender Status	Date/Time S...	Owner Account
1	F-0025958	11A - Reacquisition - P...	132-1111110	123-99900-12	Paid	4/7/2021 12:00 PM	Test Claims Account B
2	F-0026387	06 - Claims Without Co...	132-6666666		Submitted	3/5/2021 9:10 PM	Test Claims Account B
3	F-0026388	01A - Conveyance - Par...	101-1110115	123455432100	Draft	3/5/2021 9:05 PM	Test Claims 3rd Party A...
4	F-0026385	05-Supplemental	106-3323333	24689	Submitted	3/5/2021 8:48 PM	Test Claims 3rd Party A...
5	F-0026380	02-Assignment	132-0000001		Draft	3/5/2021 3:05 PM	Test Claims Account B
6	F-0026359	41A - Replacement Co...	999-1951111	123455432100	Suspended - Under Re...	3/5/2021 1:26 PM	Test Claims 3rd Party A...
7	F-0026358	33-Natural Disaster Pa...	106-4341474	123455432100	Rejected	3/5/2021 1:25 PM	Test Claims 3rd Party A...
8	F-0026357	33-HAMP Partial Claim	999-0105606	123455432100	Rejected	3/5/2021 1:22 PM	Test Claims 3rd Party A...
9	F-0026356	31-Special Forbearance	999-0010008	123455432100	Rejected	3/5/2021 1:21 PM	Test Claims 3rd Party A...
10	F-0026349	06 - Claims Without Co...	100-1121111	112358	Rejected	3/5/2021 11:41 AM	Test Claims 3rd Party A...
11	F-0026348	05-Supplemental	106-3323333	24689	Rejected	3/5/2021 11:40 AM	Test Claims 3rd Party A...

Figure 25: All Claims List View

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

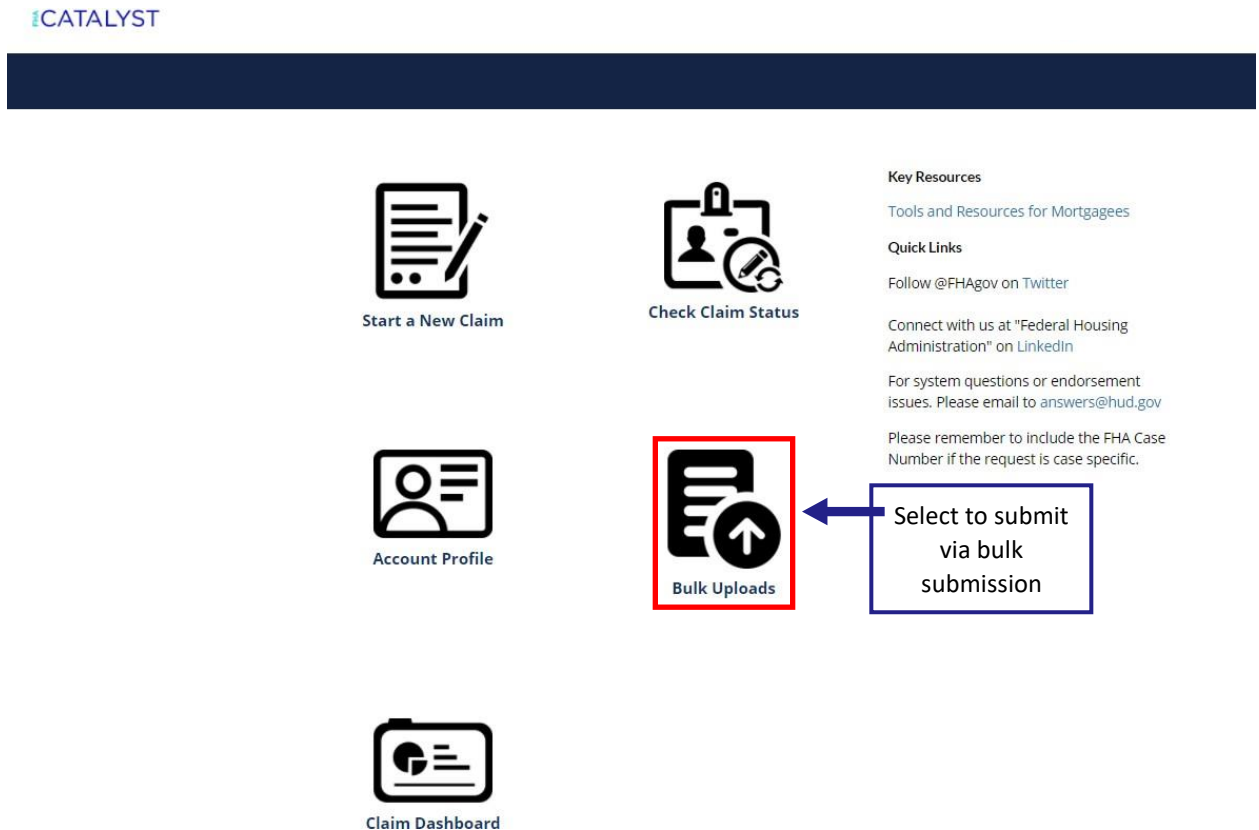


Figure 26: Bulk Submission

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)		
<input type="button" value="Upload Files"/> Or drop files		
<input type="button" value="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**.
 - It may take a few minutes for the XML file to process.



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.

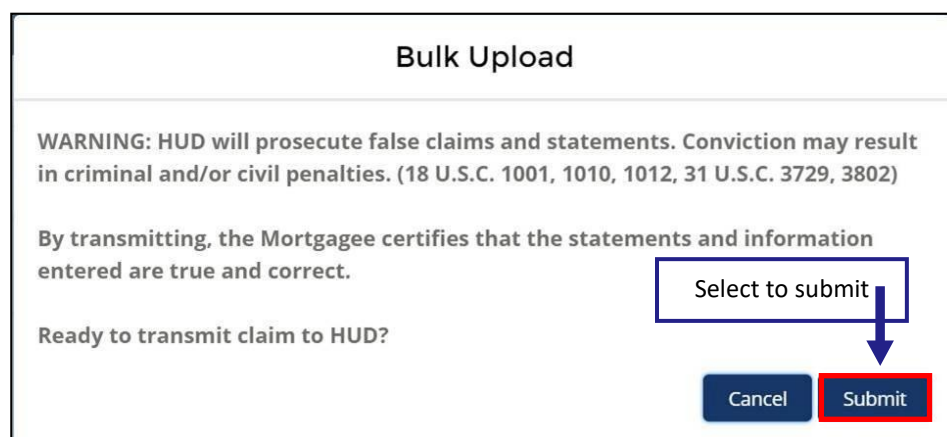


Figure 29: Confirming Claim Submission



- ⚠ 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	Case Number
Account A	00006383
Case Owner	Status
Test A Lender A	Completed with Error

System Information

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

Upload Claim Supporting Files

[Attach Documents](#)

Related Cases (2)

Case	Status
00006385	Failed
00006384	Failed

[View All](#)

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...

[View All](#)

Figure 30: Case Information Page



5.2 Attaching Supporting Files to Claims

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

Case Information	
Account Name C Test	Case Number 00013591
Case Owner Test Stacy	Status In Progress

System Information	
Created By Test Stacy, 10/28/2020 5:35 PM	Processed At
Description	Subject Form 27011 Submission
Case Origin Web	Contact Name Test Stacy
Priority Medium	Web Email

Form Submissions (1)		
Form Sub...	FHA Case N...	Lender Sta...
F-0011763	123-1028533	Draft

Figure 31: Attaching Supporting Documentation

2. Select the claim and related form section if requiring document attachment (when Lender Status = Draft or Suspended – Needs Lender Attention), then select **Upload Files** to attach (Individual .PDF, .PNG, and .JPG files are accepted but each file should be 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 under “Draft” or under “Suspended-Needs Lender Attention” lender status. If the claim had no errors, the lender status will be “Submitted”, and users may not 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.

The screenshot displays a user interface for reviewing a bulk submission case. On the left, there are sections for 'Case Information' and 'System Information'. The 'Case Information' section includes fields for Account Name (Account A), Case Number (00006383), Case Owner (Test A Lender A), and Status (Completed with Error). The 'System Information' section includes fields for 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), Case Origin (Test A Lender A), and Priority (Medium). On the right, there is an 'Upload Claim Supporting Files' section with an 'Attach Documents' button. Below that is a 'Related Cases (2)' table with columns for Case and Status, showing two failed cases with IDs 00006385 and 00006384. At the bottom right, there is an 'Error Logs (6+)' section with a table of error logs. A red box highlights the 'View All' button in the Error Logs section, with an arrow pointing to it from a text box that says 'Select to view all Error Logs'.

Figure 33: Review Error Logs

- 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

[Return to table of contents](#)



6. Checking Claim Status

6.1 Review Claim Status

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

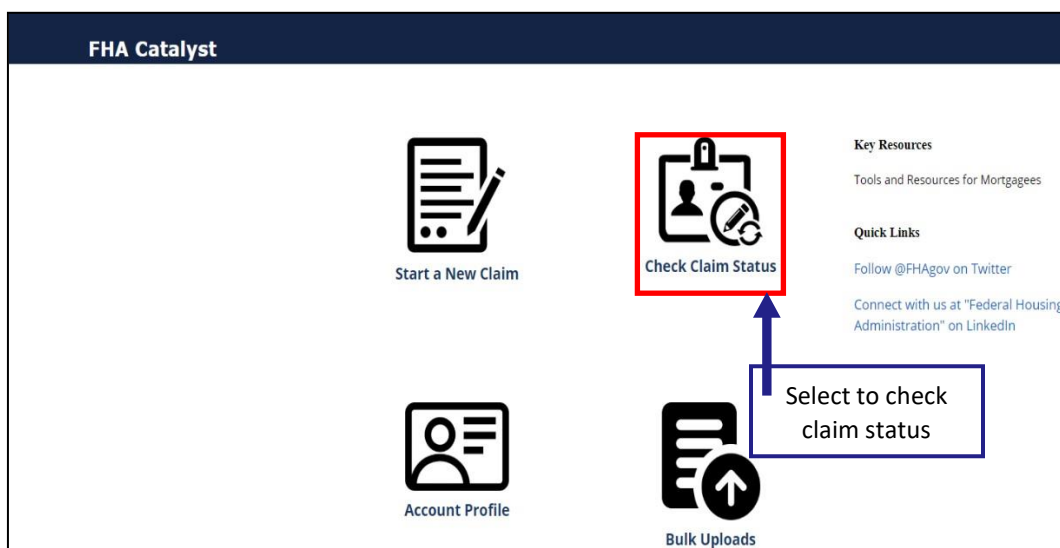


Figure 35: Check Claim Status

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

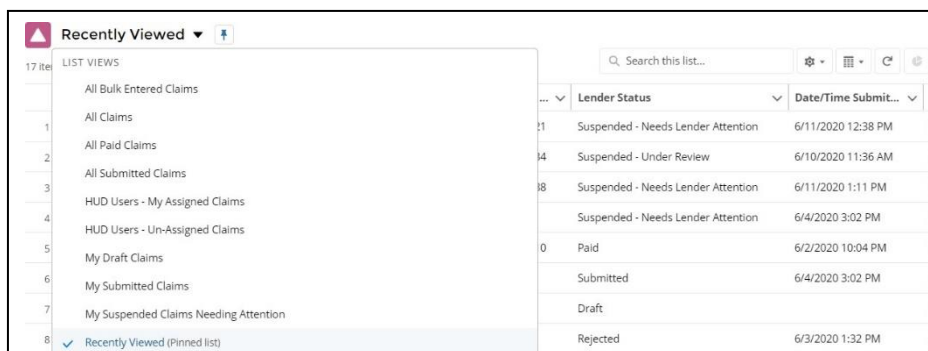


Figure 36: List Views

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

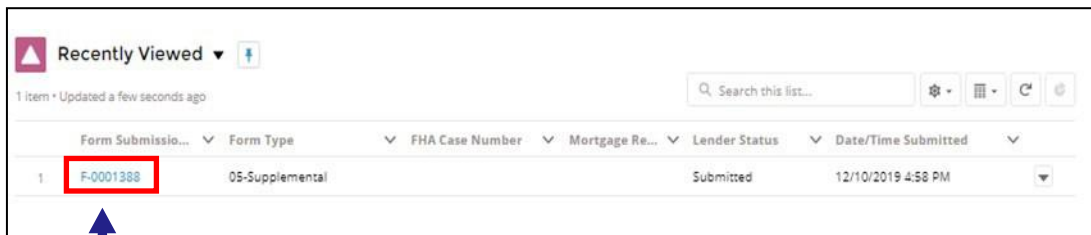


- ⚠ To set a specific view as the default view for every time navigating to this page, select the **Pin** icon.



Figure 37: Changing Filter Criteria

- ⚠ Each filtered list shows the following information:
 - Form Submission Number (Reference number) (F-xxxxxxx)
 - Form Type (= Claim Type) (e.g. 05-Supplemental)
 - FHA Case Number (xxx-xxxxxxx)
 - Mortgagee Reference Number (maximum of 15 digits)
 - Lender Status (Paid, Submitted, Draft, etc.)
 - Date/Time Submitted (e.g. 12/10/2019 4:58 PM)
- ⚠ To view a read-only version (Lender Status = Paid, Rejected, Bill Sent, Full Payment Sent to HUD) or an editable version (Lender Status = Draft) of a claim, select the **Form Submission Number**.



Select to view a read-only or editable version

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**

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

Part A - General Information

> Edit Codes

Lender Status	Date/Time Submitted	Time
Suspended - Needs Lender Attention	6/11/2020	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 Codes details, click on **Edit Codes** again.

Part A - General Information

▼ Edit Codes

Edit Code	Description
F2	Title: Default Date 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	Date/Time Submitted	Time
Suspended - Needs Lender Attention	6/11/2020	12:38 PM

Figure 41: Suspended Claim's Edit Codes

6. In this read-only view of a Claim, users can also view 'HUD Comments' provided by HUD Users. (Note: This field may also be viewed via various reports in the Claims Dashboard)



7. Claims Corrections

- i** A lender may submit claims corrections via single or bulk submission.
- !** Corrections are not applicable for Supplemental Claims of any lender statuses.
- !** Lenders can do correction when lender status = Submitted, Suspended-Under Review or Suspended-Needs Lender Attention by clicking **Correction** Button on Read Only Page after selecting the Form Submission Number Link. (**Exception: Claim Type 05-Supplemental has no Correction Button/Option.**) Lenders can click **Done** button on the read only page to be back on the check claim status list view page.

Mortgagee's Comments, If Any

HUD Comments, If Any

FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.

Warning: Submissions made after 8 PM Eastern may not be processed until the following night.

[Correction](#) [Done](#)

Figure 42: Correction Button on Read Only Page

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.

Form Submission Number	Form Type	FHA Case N...	Mortgage Ref...	Lender St...	Date/Time Submitted
1	F-0010205			Submitted	6/26/2020 1:35 PM
2	F-0010189			Submitted	6/18/2020 1:53 PM

Figure 43: Selecting Claim for Correction



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

Part A - General Information

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

Figure 44: Read-only Version of Submitted Claim



4. Scroll to the bottom of the form to view the 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	F-0010205	33-National Emergency Partial Claim		Submitted	7/7/2020 5:46 PM
2	F-0010189	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.

w 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](#).



8. View AOP

When a claim is processed, HUD will provide the AOP. Previously Mortgagees may locate AOP under the Single Family Insurance Claims Processing menu in the Single Family FHA/Single Family Servicing section of FHA Connection and AOP is available by accessing the 'Claim Status' function.

FHA Catalyst provides these for newly processed claims. Users will be able click 'View AOP' button at the bottom of the read-only pageview for claim types 01A, 01B, 02, 05, 06, 07, 31, 32, and 33 for claims submitted and paid within FHA Catalyst. Other claims submitted and paid within FHA Catalyst will have their AOPs provided to Mortgagees per existing processes (via email). After the user clicks on the 'View AOP' button, a new web page/tab will open with the PDF File: *Advice of Payment* provided for lenders to view and download.

Step 1: When Lender Status = Paid, View AOP button is available for Lenders to view/click on the read only page.

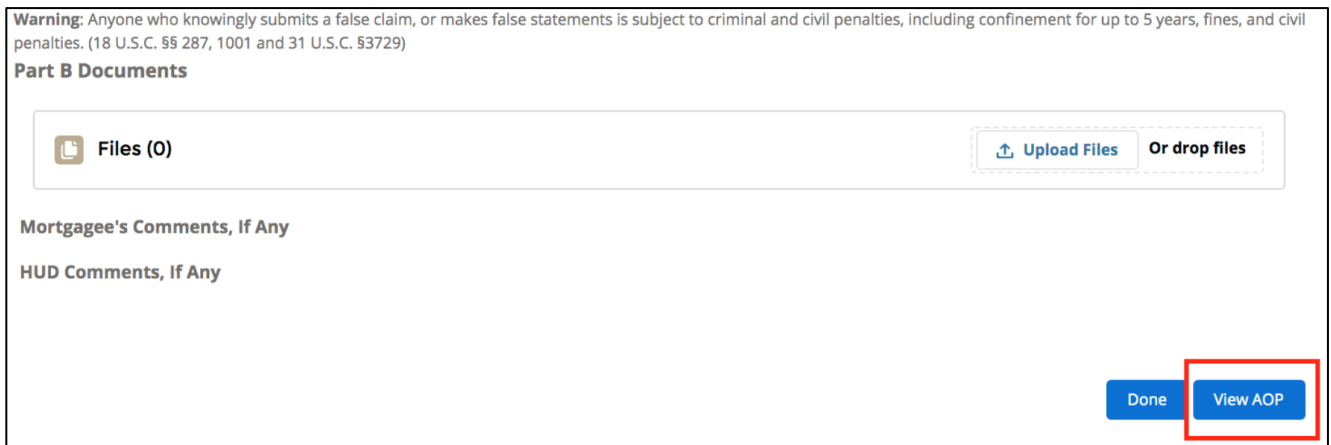


Figure 46: View AOP Button on Read Only Page

Step 2: After lenders click on the "View AOP" button, lenders can see a pdf file with title of AOPPdfView in a new tab/web page with downloading option and printing option provided.



AOPPdfView 1 / 2 100% + [Download] [Print] [More]

Single Family Claim Status 3/6/2021

Advice of Payment

DEAR SIR OR MADAM:

SUBJECT: FHA CASE NUMBER 123-1027333 ADVICE OF PAYMENT

MORTGAGEE NAME: SERVICER NAME:

MORTGAGEE LENDER ID: SERVICER LENDER ID:

MORTGAGEE ADDRESS: SERVICER ADDRESS:

MORTGAGEE REF NO:

SECT OF ACT: CLAIM TYPE: 05-Supplemental

SETTLEMENT DATE: SCHEDULE NUMBER:

DATE CLAIM REC'D: 10/27/2020 DUE DATE LAST INSTALLMENT:

LINE NO	**DESCRIPTION**	DEDUCTION	EXPENSE	INTEREST	RATE
017	UNPAID PRINCIPAL BALANCE				
107	Adjustment to Loan Balance (if different from Item 17, Part A)				
108	Sale/Bid or Appraisal Value (for Coinsurance or Nonconveyance)				
109	Escrow Balance (as of date in Item 10, Part A)				
110	Total Disbursements for Protection and Preservation				
111	Total Disbursements				

Figure 47: Download and Print AOP PDF

Step 3: Lenders can be able to download or print the Advice of Payment PDF File for record by clicking download button or printer button on the top right of the page.



Advice of Payment

DEAR SIR OR MADAM:

SUBJECT: FHA CASE NUMBER	999-1234321	ADVICE OF PAYMENT	
MORTGAGEE NAME:	HOLDER TEST	SERVICER NAME:	SERVICER TEST
MORTGAGEE LENDER ID:	99999	SERVICER LENDER ID:	99999
MORTGAGEE ADDRESS:	1 MAIN ST WASHINGTON DC 200010001	SERVICER ADDRESS:	1500 PENN AVE WASH DC 20001
MORTGAGEE REF NO:		CLAIM TYPE:	02-Assignment
SECT OF ACT:	0703	SCHEDULE NUMBER:	0482E
SETTLEMENT DATE:	3/2/2021	DUE DATE LAST INSTALLMENT:	11/1/2018
DATE CLAIM REC'D:	2/9/2021		

LINE NO	**DESCRIPTION**	DEDUCTION	EXPENSE	INTEREST	RATE
017	UNPAID PRINCIPAL BALANCE		38255.17		
107	Adjustment to Loan Balance (if different from Item 17, Part A)	0.00	0.00		
108	Sale/Bid or Appraisal Value (for Coinsurance or Nonconveyance)	0.00			
109	Escrow Balance (as of date in Item 10, Part A)	0.00			
110	Total Disbursements for Protection and Preservation		0.00	0.00	
111	Total Disbursements		0.00	0.00	

Figure 48: AOP PDF Screen



9. Dashboard

9.1 Navigating to the Claim 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**.

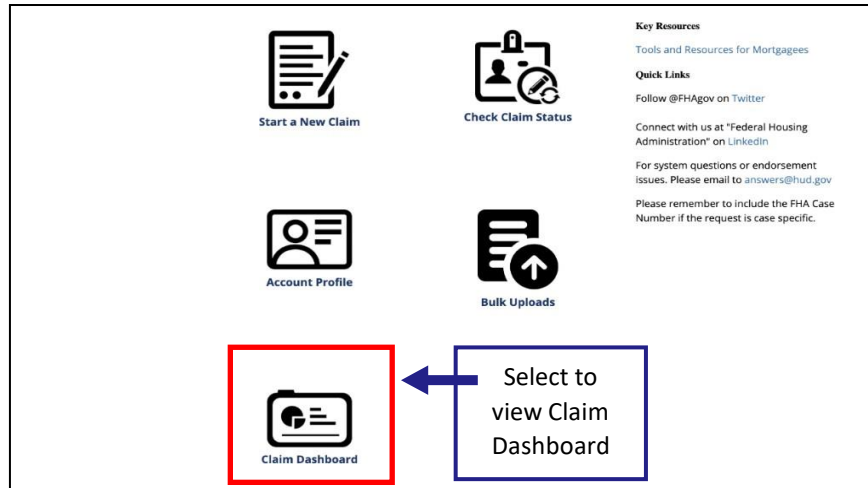


Figure 49: FHA Catalyst Claims Home Page with Claim Dashboard Icon

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

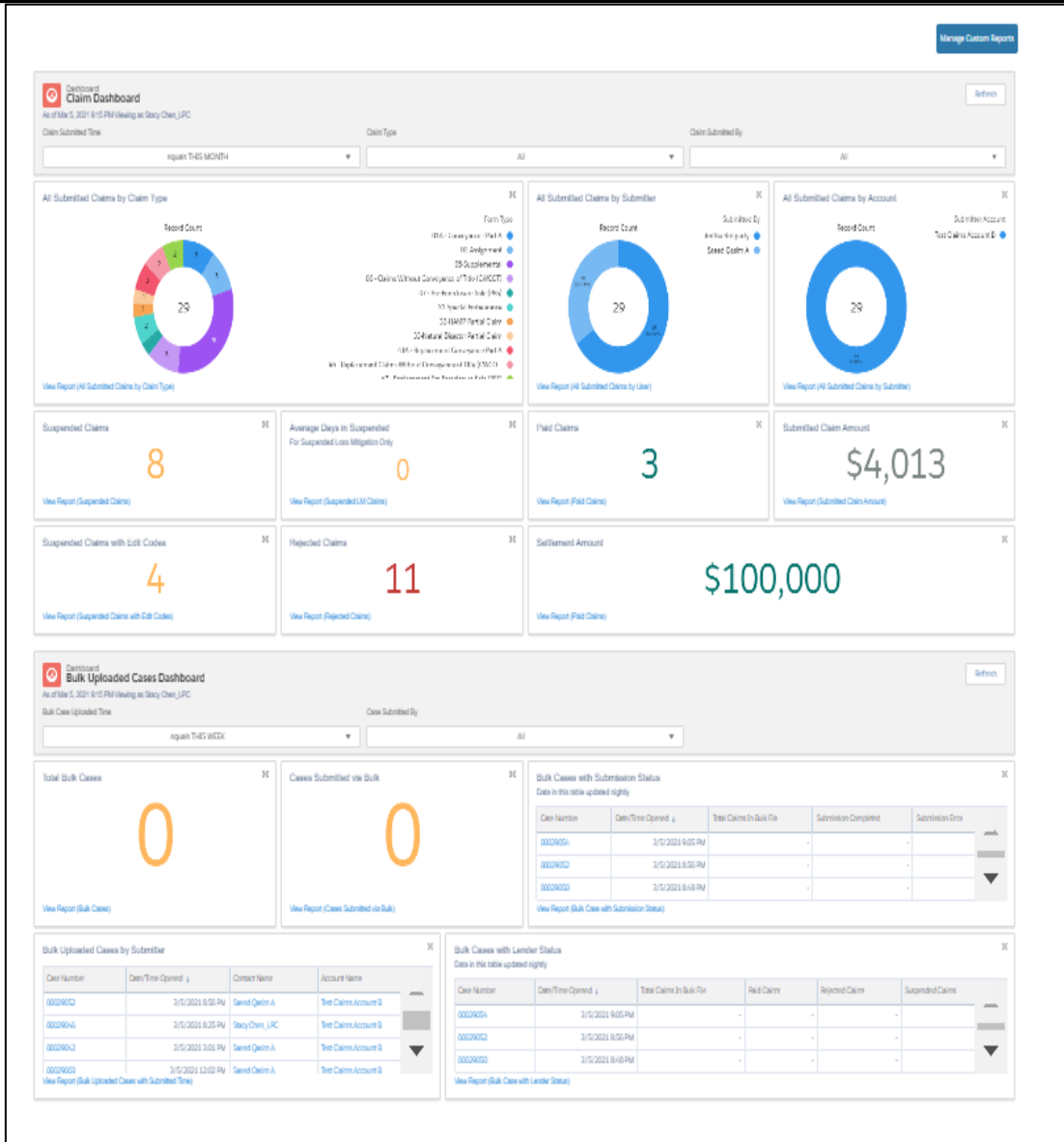
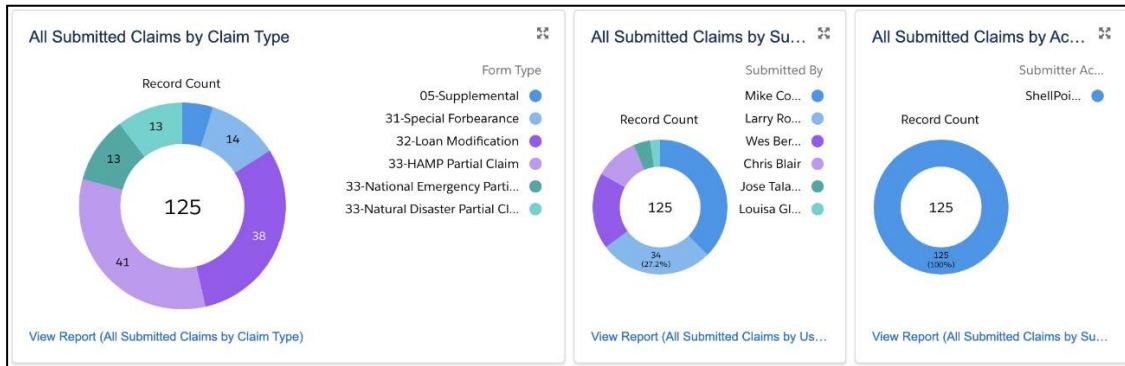


Figure 50: Claim Dashboard and Bulk Uploaded Cases Dashboard



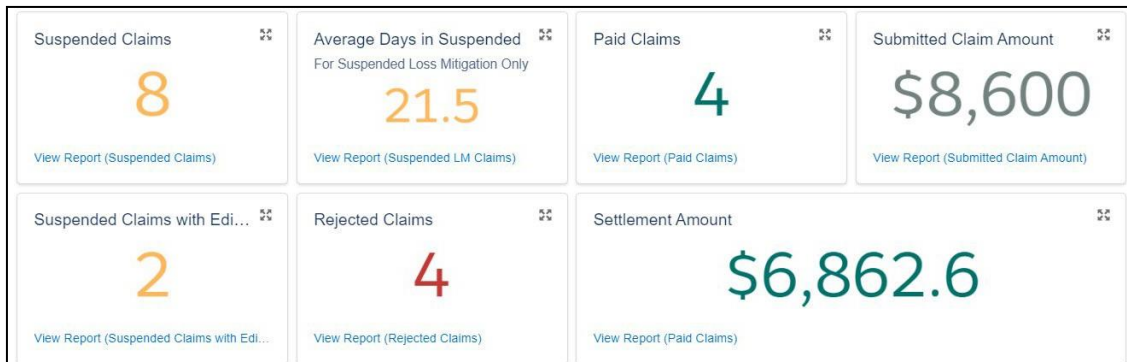
9.2 Claim Dashboard



i 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 51: Claim Dashboard – Circle Charts



i 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 52: Claim Dashboard - Metric Chart

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



Figure 53: Refresh the Claim Dashboard



9.3 Filtering the Claim Dashboard

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

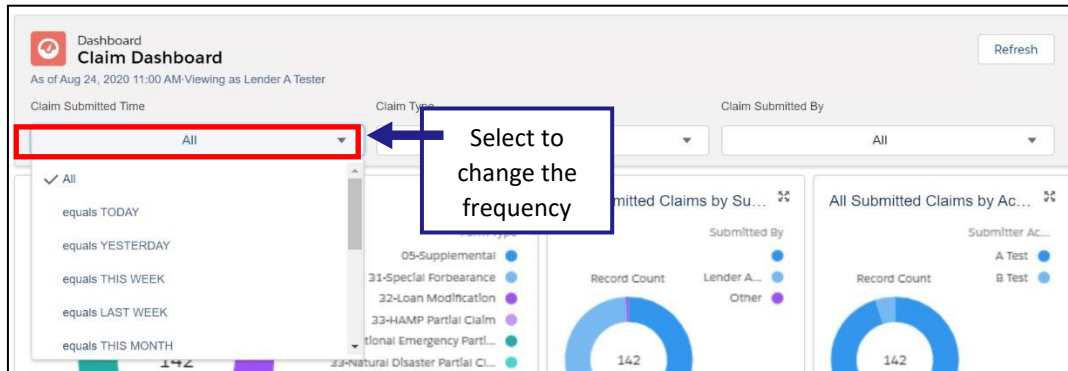


Figure 54: Claim Submitted Time

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

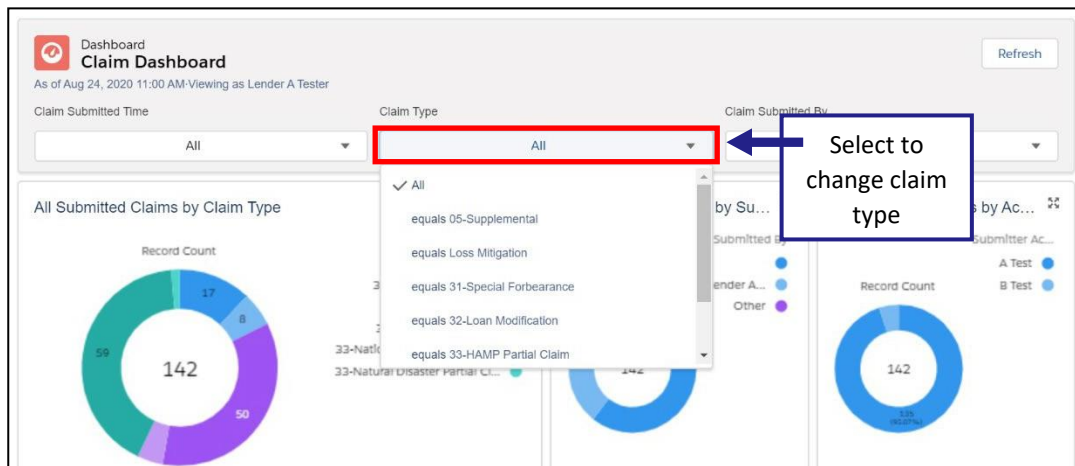


Figure 55: Claim Type

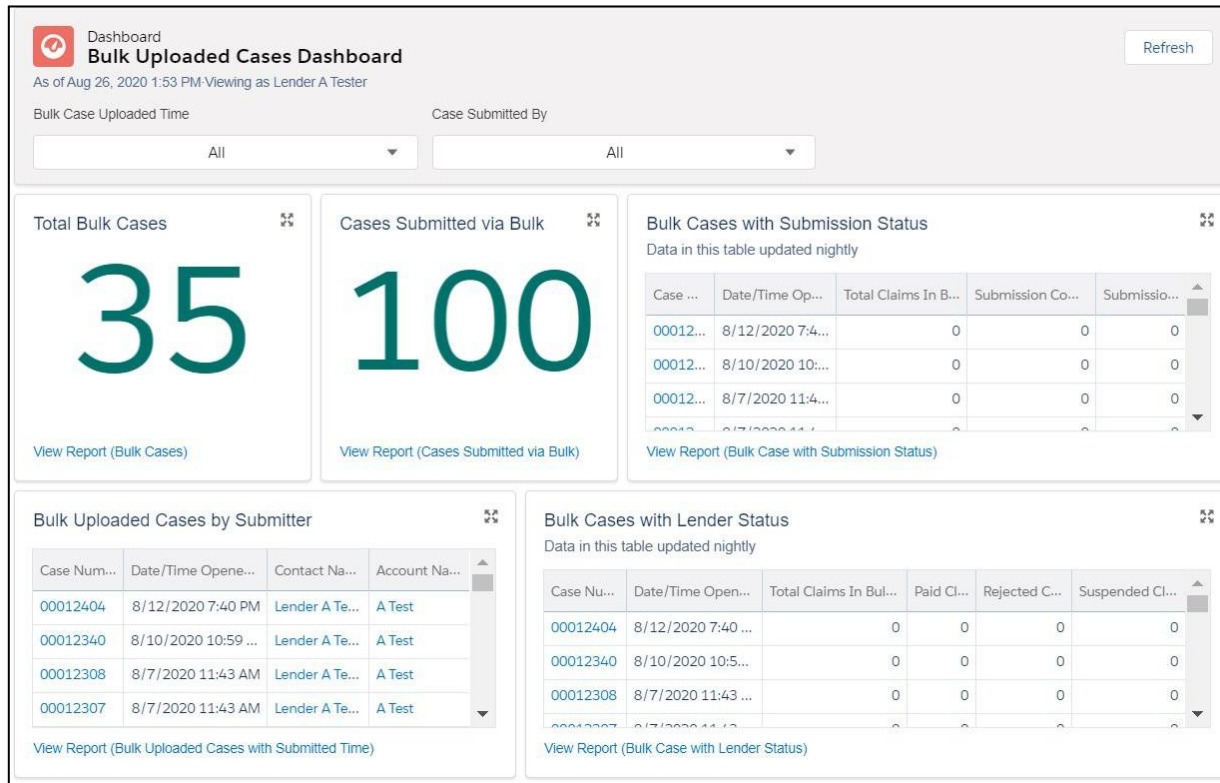
3. Select **All** under Claim Submitted by to filter/change claims submitted by users or only self.



Figure 56: Claim Submitted By



9.4 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 57: Bulk Uploaded Cases Dashboard



9.5 Filtering the Bulk Uploaded Cases Dashboard

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

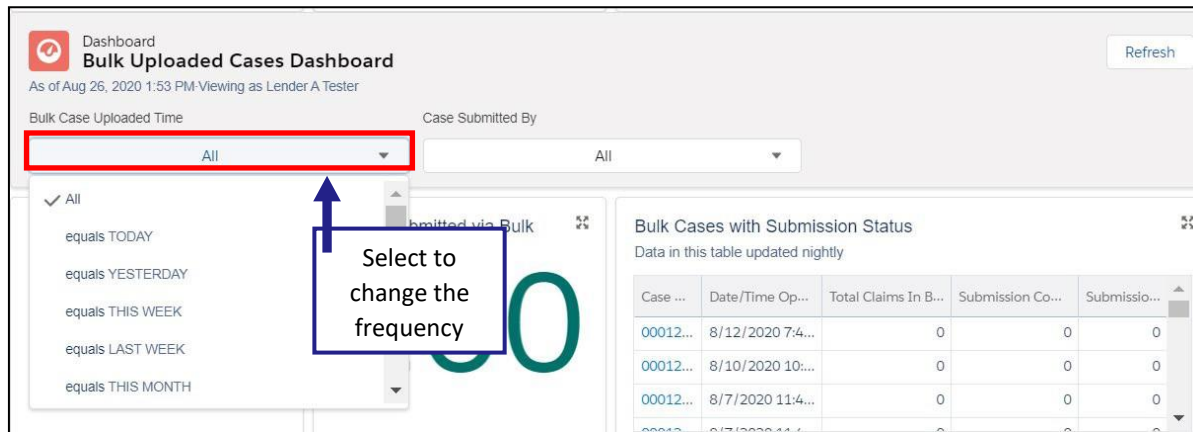


Figure 58: Cases Uploaded Frequency

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

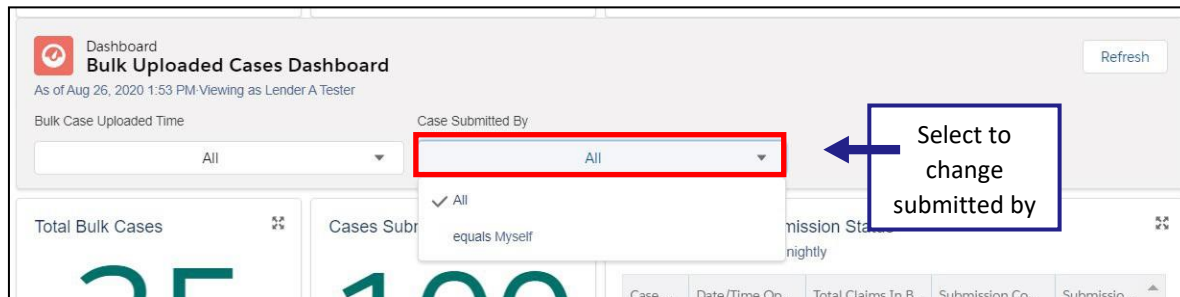


Figure 59: Cases Submitted By



9.6 Expanding and Exporting Dashboards

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

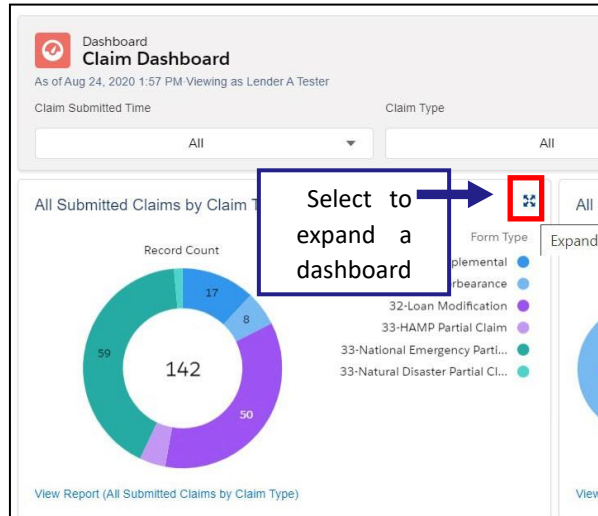


Figure 60: Expanding a Dashboard

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

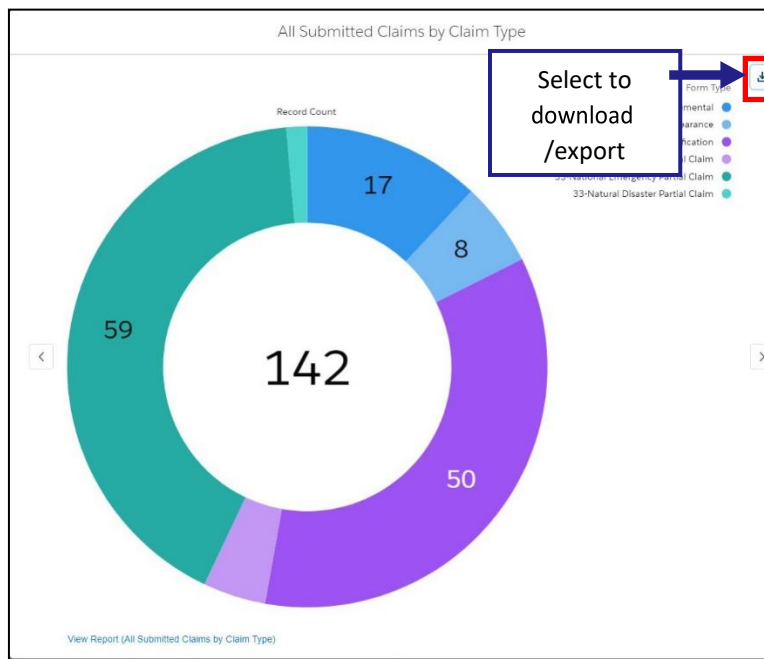


Figure 61: Exporting a Dashboard

- 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.

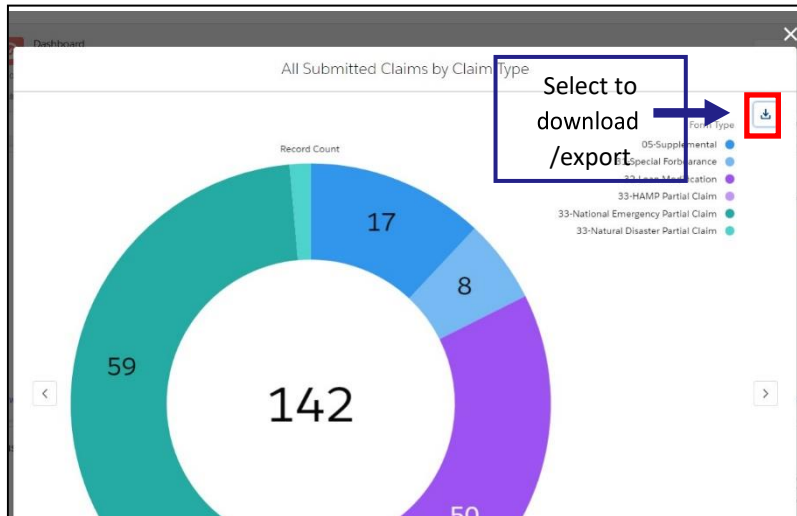


Figure 62: Return to Dashboard Home Page

The figure shows a report titled "Report: Form Submissions with Account Rejected Claims". The table has columns for Lender Status, Submitter Account, Submitted By, Date/Time Submitted, and HUD Comments. The HUD Comments column is highlighted with a red box. The table contains 11 rows of rejected claims, all from "Test Claims Account B" submitted by "Anitha 3rd party".

Lender Status	Submitter Account	Submitted By	Date/Time Submitted	HUD Comments
Rejected (11)	Test Claims Account B	Anitha 3rd party	3/5/2021 1:25 PM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
	Test Claims Account B	Anitha 3rd party	3/5/2021 1:22 PM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
	Test Claims Account B	Anitha 3rd party	3/5/2021 1:21 PM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
(CWCOT)	Test Claims Account B	Anitha 3rd party	3/5/2021 11:41 AM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
	Test Claims Account B	Anitha 3rd party	3/5/2021 11:40 AM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
	Test Claims Account B	Anitha 3rd party	3/5/2021 11:31 AM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
	Test Claims Account B	Anitha 3rd party	3/4/2021 12:09 PM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
(CWCOT)	Test Claims Account B	Anitha 3rd party	3/4/2021 12:08 PM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.
	Test Claims Account B	Anitha 3rd party	3/4/2021 12:04 PM	FHA Case Number is Invalid. Please resubmit a new Claim with a Valid FHA Case Number.

Figure 63: View HUD Comments via Report link from Claim Dashboard

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10.Reporting

10.1Managing Custom Reports

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



Figure 64: Viewing All Report

1. Reports can be filtered by most recently viewed reports.

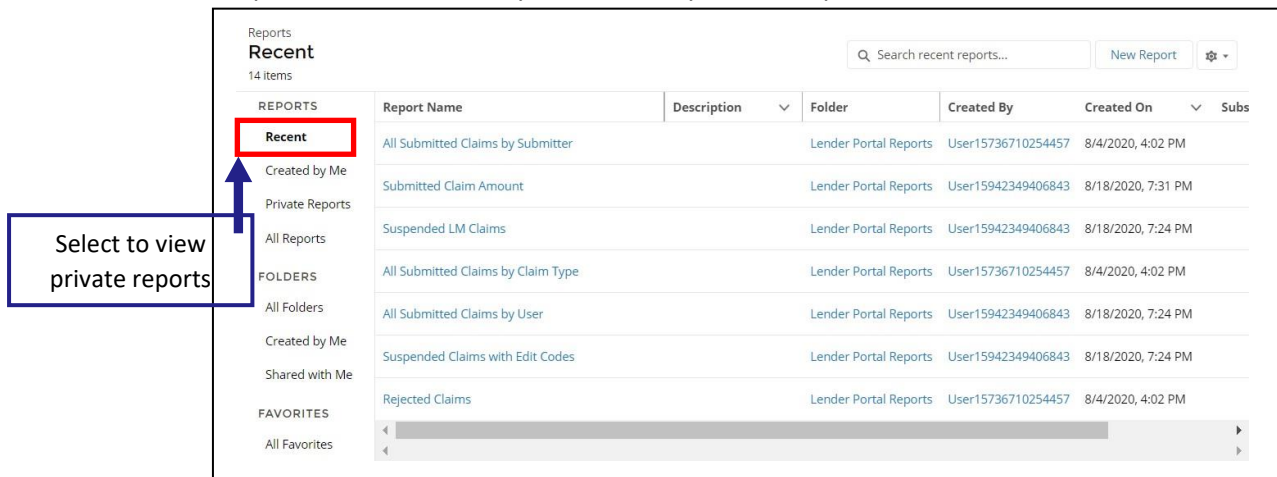


Figure 65: Most Recent Reports

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

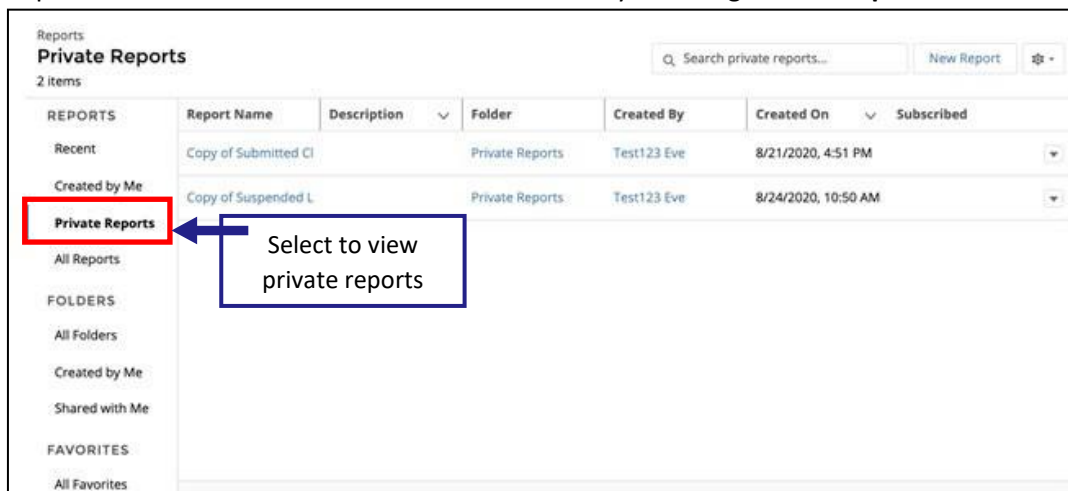


Figure 66: Viewing Private Reports



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

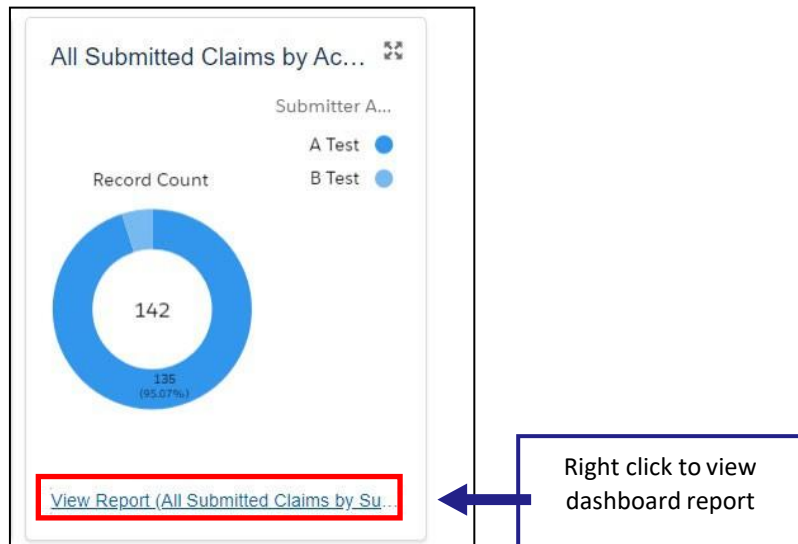


Figure 67: Viewing Dashboard Reports

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

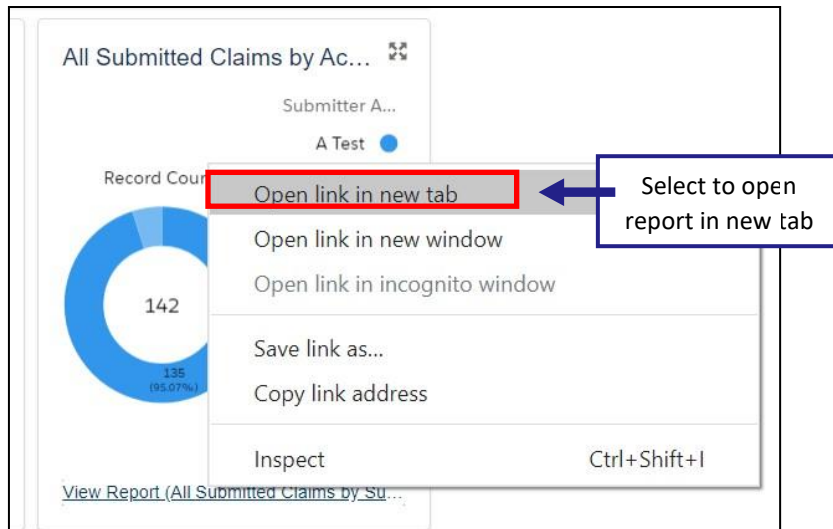


Figure 68: Opening Report in New Tab

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

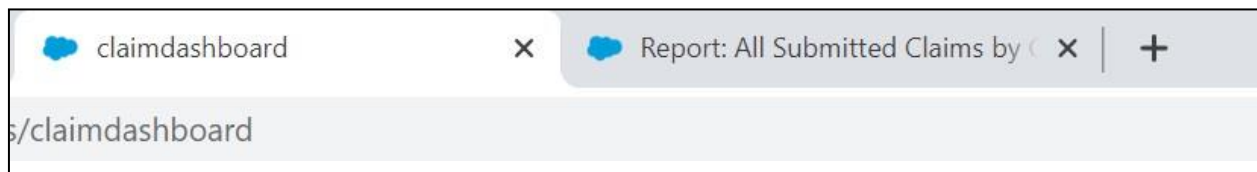


Figure 69: Report in New Tab



4. The Report is viewable.

Report: Form Submissions with Account
All Submitted Claims by Submitter

Total Records
142

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 Testr
	F-0010682		32-Loan Modification	7/30/2020 1:39 PM	Lender A Testr
	F-0010683		33-National Emergency Partial Claim	7/30/2020 1:39 PM	Lender A Testr
	F-0010675		32-Loan Modification	7/30/2020 1:05 PM	Lender A Testr
	F-0010676		33-National Emergency Partial Claim	7/30/2020 1:05 PM	Lender A Testr
	F-0010582		31-Special Forbearance	7/16/2020 4:28 PM	Lender A Testr
	F-0010190		05-Supplemental	7/13/2020 2:56 PM	Lender A Testr
	F-0010571		32-Loan Modification	7/13/2020 1:09 PM	Lender A Testr
	F-0010572		33-National Emergency Partial Claim	7/13/2020 1:09 PM	Lender A Testr
	F-0010204		32-Loan Modification	7/13/2020 1:01 PM	Lender A Testr
	F-0010205		33-National Emergency Partial Claim	7/7/2020 5:46 PM	Lender A Testr
	F-0010203		05-Supplemental	6/26/2020 1:47 PM	Lender A Testr
	F-0010197		05-Supplemental	6/23/2020 3:58 PM	Lender A Testr
	F-0010198		32-Loan Modification	6/23/2020 3:50 PM	Lender A Testr

Row Counts Detail Rows Subtotals Grand Total

Figure 70: Dashboard Report

10.2 Saving a Report

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

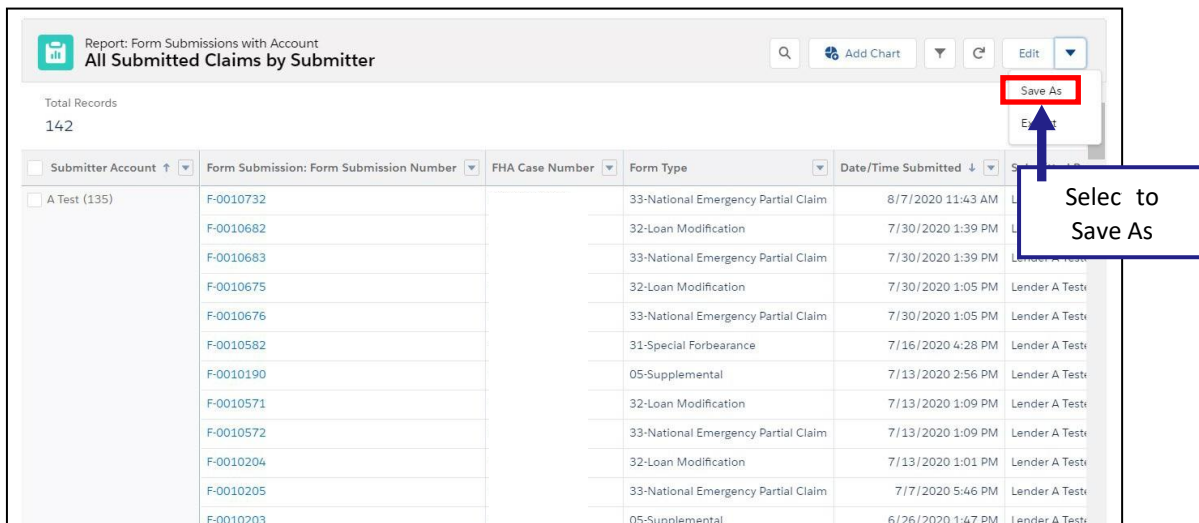


Figure 71: Saving a Report



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

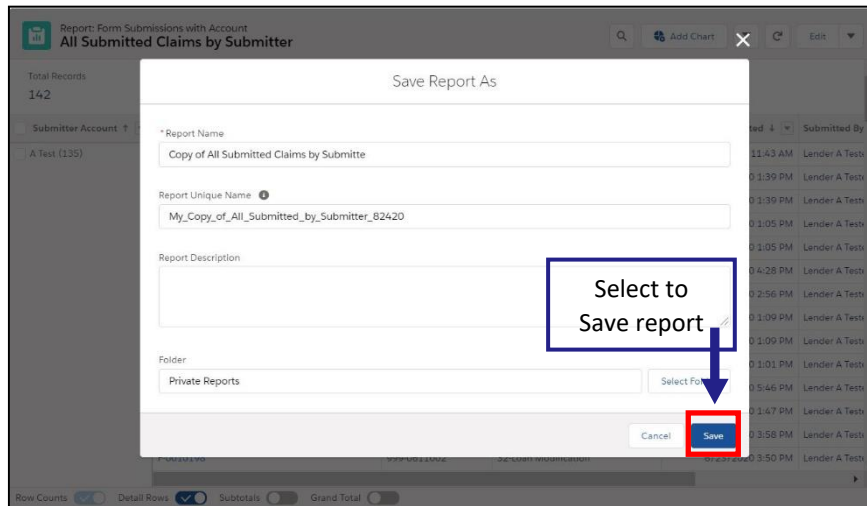


Figure 72: Saving a Report

10.3 Exporting a report

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

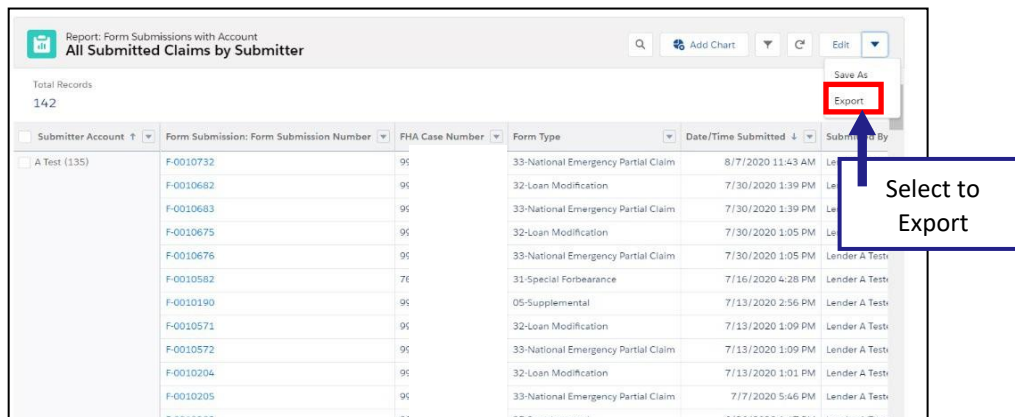


Figure 73: Exporting a Report



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

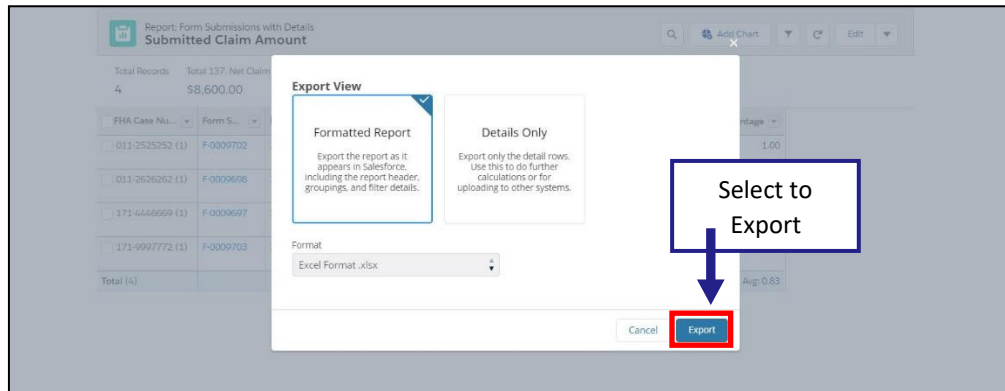


Figure 74: Exporting a Report

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
Total	Sum			\$8,600.00		\$6,862.60	
	Avg						0.8275
	Count	4					

Figure 75: Report in Excel

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11. Getting Help

For further assistance, please contact the FHA Resource Center:

- E-mail: answers@hud.gov or FHACatalyst@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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12. Appendix

12.1 Appendix A – Bulk Case Status Definitions

Bulk Case Status	Definition / Next Steps
New	Still in queue to be processed. Wait for system to process claim(s).
Uploaded	Claims are uploaded. Wait for system to process claim(s).
In Progress / In Validation	Claims are being validated for data quality. Wait for system to process claim(s).
Failed	The XML that was uploaded is invalid. Read attached Error Logs and resubmit XML file after making corrections.
Completed	All claims in the attached XML file were uploaded successfully. Begin uploading supporting documentation.
Completed with Error	At least a single claim in the attached XML file has a data quality errors; some claims may have also fully processed. Read attached Error Logs and resolve individual claim errors. Upload supporting documentation for successfully uploaded claims.
(Individual Case) Completed Successfully	Individual claims added via bulk files will also show a status. Completed Successfully means that the Claim has passed all validations and is submitted or ready to perform additional submission tasks.
(individual Case) Failed	A claim added via bulk processes that has data quality errors and has not been submitted for full processing / payment.

Table 1: Bulk Upload Status

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