## Solution Information

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## Document History

<table>
<thead>
<tr>
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1. Overview - *FHA Catalyst: Mortgagee Administrator Role*

The Mortgagee Administrator Role is a new role for Mortgagees to onboard and manage all users in their institution in *FHA Catalyst*, the web-based system for the Federal Housing Administration (FHA). Once the Mortgagee Administrator Role has been granted to a user, these Mortgagee Administrators can onboard, manage, freeze/unfreeze, and disable/deactivate all users in their institution.

This guide explains how to use the Mortgagee Administrator Role. 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: Mortgagee Administrator Role 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 the associated 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. Numbered lists, bullets, and screenshots are used to give the step-by-step instructions for completing tasks in *FHA Catalyst*.

**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. The screenshot may also include boxes, lines, and labels that show which part of the page is important.
2. Getting Started

This section defines the basic functionalities of FHA Catalyst as well as specific terminology to help Mortgagees navigate the system and describes how Mortgagees onboard and manage users using the Mortgagee Administrator Role.

2.1 Access Information

FHA-approved Mortgagees must designate a Mortgagee Administrator for their institution to manage user access for FHA Catalyst modules. To add or terminate a Mortgagee Administrator, mortgagees must download the “FHA Catalyst User Access Request Form” on the FHA Catalyst website and send it to the FHA Resource Center at answers@hud.gov.

A prerequisite to becoming a Mortgagee Administrator in FHA Catalyst is that the user is a current FHA Connection (FHAC) Application Coordinator. If the user is not an FHAC Application Coordinator, the user must request access via FHAC prior to requesting access for FHA Catalyst. Upon verification of the FHAC Application Coordinator role, then HUD will grant the user FHA Catalyst Mortgagee Administrator access.

2.2 FHA Catalyst Landing Page

Once the Mortgagee Administrator role has been granted, the Mortgagee Administrator will be able to view and select Account Management on the dropdown list under their Username on the FHA Catalyst Landing Page. The option will take the Mortgagee to the Institution Users Page, where all users in their organization are displayed.

![Figure 1: FHA Catalyst Landing Page](image)

1. The FHA Catalyst Landing Page contains the follow items:
• The **Username** is displayed on the top right of the screen. Users can view their profile and logout when selecting their Username.
• The **Module** logo is displayed on the center of the page where users will need to select to access the Application. Please note that Module access is provided to Mortgagees based on what they are currently using in **FHA Catalyst**.
• **Key Resources** are provided on the right of the page where users can access additional resources.
• **Quick Links** are provided on the right of the page where users can access FHA social media and send any questions or comments to the FHA Resource Center.

2. Select on the **Account Management** to access the Institution Users Page.

### 2.3 Institution Users Page

The Institution Users Page displays a list view of all users previously onboarded by the Mortgagee Administrator. It allows for Mortgagee Administrator to onboard new users in the institution.

![Figure 2: Institution Users Page](image)

1. The **Institution Users tab** displays all Users uploaded by the Mortgagee Administrator.
2. The **Manage Permission tab** allows the Mortgagee Administrator to assign module access for users in the institution.
3. The **New** button allows the Mortgagee Administrator to create a new User Contact in the institution.
4. The **Printable View** button allows the Mortgagee Administrator to run a report of all users in the institution.
5. The **List View** provides the Mortgagee Administrator with the ability to view their recently reviewed Users records.
   • To update your filter criteria, select the Dropdown icon. Then select the desired view (Figure 3 below).
   • To set a specific view as the default view every time you navigate to this page, select the Pin icon (Figure 3 below).
Select “All Contacts” to view all Users onboarded by the Mortgagee Administrator.

6. **To search for a specific User**: enter two letters in the search bar and place a space between them. Hit **Enter** to search.
   - Note: to clear a search and return to the full list view, select the “x” icon in the search bar or delete the entry and press Enter.
7. **To sort User records**, select the name of the column header. The arrow next to the column header name indicates the sort type (ascending or descending).

![Figure 5: Sorting Columns](image)

*Figure 5: Sorting Columns*
3. Onboarding a new User

This section illustrates how a Mortgagee Administrator onboards a new User for their organization. Creating a new user is a three-step process:

1. To onboard a new Mortgagee User, select the New button.

   ![Figure 6: Onboard a New User](image)

   **Figure 6: Onboard a New User**

2. The New Contact Screen is displayed, which allows the Mortgagee Administrator to enter Contact Information for the new Mortgagee User.
3. Enter Contact First Name, Last Name, Email, and other information.
4. Click the **Save** button. To add multiple Mortgagee Users, click the **Save & New** button.
5. After **Save** is selected, the **Mortgagee User** is created as a **New Contact** and you can go to the next step.

### 3.2 Assign the User a Username to access the *FHA Catalyst* platform

A Mortgagee User must be enabled as a Customer User to access the *FHA Catalyst* platform -- this step creates the credentials which will be associated with the User.

1. Select **Enable Customer User** on **User Contact Page** to create the username for the Mortgagee User and assign the Mortgagee User the applicable FHA Catalyst permission sets/roles.
2. Enter the **Email Address, Alias, Username,** and **Nickname** for the Mortgagee User.

3. **Username Format** – This is the user name that the Mortgagee User will use to log into the platform. It must be unique in the platform. We recommend a format using a unique but easy to remember value, such as an email address but with the suffix of .hud2, as follows: “email@example.hud2”

   Example: example@test.com.hud2

   NOTE: At the time the Mortgagee User is emailed their Username, they will also receive a link directing them to set Password.

4. Set the Role to **Customer User**.

5. The Profile should be **HUD Lender Customer Community Plus User Profile**.
3.3 Assign the User the applicable Permission Set

After creating the Mortgagee User and assigning them a Username with which to log into the system, a permission set must be added to enable access to the applicable modules in the FHA Catalyst platform. To add the Permission Sets to the Mortgagee User:

1. Select Manage Permissions Tab
2. On the Manage Permissions Page click dropdown list of the user and then click Manage Permissions.
3. On the Edit Assignments Screen select the Permission Set for the application from the Available Permission Sets List.
4. Click the **Add** > **Button** to move the Permission Set to the **Enabled Permission Sets** section.

5. Click the **Save** **Button**.

6. The new Permission Set is added to the Mortgagee User’s account. Please note that certain user roles require the “FHA Catalyst User Access Request Form” to be sent to the FHA Resource Center for access.

![Figure 11: Edit Assignment Screen](image)

Please refer table below to assign Mortgagee User the appropriate permission set for each Module:

<table>
<thead>
<tr>
<th>Module</th>
<th>Role</th>
<th>Permission Set Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appraisal</td>
<td>Mortgagee User</td>
<td>Appraisal</td>
</tr>
<tr>
<td>Appraisal</td>
<td>Service Bureau Coordinator</td>
<td>Appraisal, Service Bureau Coordinator</td>
</tr>
<tr>
<td>Single Family Housing Case Binder</td>
<td>Mortgagee User</td>
<td>SFH Case Binder</td>
</tr>
<tr>
<td>Multi Family Housing Case Binder</td>
<td>Mortgagee User</td>
<td>MFH Case Binder</td>
</tr>
<tr>
<td>Claims</td>
<td>Mortgagee User</td>
<td>FHA Claims</td>
</tr>
<tr>
<td>Loan Origination</td>
<td>Mortgagee User</td>
<td>Loan Origination</td>
</tr>
<tr>
<td>SFDMS</td>
<td>Mortgagee User</td>
<td>SFDMS Servicer Admin&lt;br&gt;SFDMS Servicer Submitter&lt;br&gt;SFDMS Servicer Auditor</td>
</tr>
</tbody>
</table>

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4. Manage Users

This section illustrates how the Mortgagee Administrator can manage a Mortgagee User in their organization. It includes the following common updates that are made to Users:

- **EDIT CONTACT** - Change Contact information for users in the organization.
- **PASSWORD RESET** - Send a password reset link to an active user.
- **FREEZE/UNFREEZE** - Lock a user out but enable the user to be reinstated later; Reinstate a frozen user to make them active again.
- **DISABLE CUSTOMER USER** - Permanently disable the Contact level of the Mortgagee User account. Require a brand-new account to be set up for the user if they need access in the future.
- **DEACTIVATE** - Deactivate the Mortgagee User account. If applicable, please use Freeze feature to prevent user from logging in until any open / in-process Case Binder cases created by the user are transferred to another user. The ability to transfer Case Binders is not available yet to the Mortgagee Administrator role; please contact the HUD Help Desk for assistance to transfer open/in-process Case Binders.

4.1 Edit Contact information for a Mortgagee User

1. Search for and select the Name of the Mortgagee User to review the contact detail.
2. Either select Edit icon or Edit button to change Contact Information for the Mortgagee User.

![Figure 12: Contact Detail Page](image)
4.2 Reset a Password for a Mortgagee User

Mortgagee Administrators have the ability to reset passwords for Mortgagee Users in their institution. The Mortgagee User **MUST** be in active status (not frozen account status) in order to reset their password.

1. On the Manage Permissions Page, sort to find the Mortgagee User by name; once you have confirmed it is the correct user, click on the icon for the dropdown list of the user and then click **Reset Password**.

![Figure 13: Reset Password](image)

2. Click **Reset Password** on the Pop-Up window to continue.

3. An automated email will be generated for the Mortgagee User to use to reset their password. The Mortgagee User will need to click on the link to reset their password.

   **NOTE:** This link is only valid for 24 hours.

![Figure 14: Password Reset Notification Email for Users](image)
4.3 Freeze/Unfreeze a Mortgagee User account

Mortgagee Administrators can suspend a Mortgagee User’s account and enable the Mortgagee User to be reinstated later.

- Temporarily disable the account. Good for returning users.
- Does not free up license
- Ideal to prevent the user from logging in temporarily.
- Used when situations preventing deactivation of users.

To freeze a Mortgagee User account:

1. On the Manage Permissions Page select appropriate blue hyperlink of Full Name of User.
2. Click Freeze/Unfreeze button once confirmed it is the correct User.

![Figure 15: Freeze the Mortgagee User](image1)

![Figure 16: Unfreeze the Mortgagee User](image2)
4.4 Disable a Mortgagee User Account

Disabling a Mortgagee user account will permanently disable the “Contact”.

Disabling a user means that they cannot be reactivated with their original User record. After a user has been disabled, you must create a new User - it is not possible to re-enable a disabled User record

We recommend disabling a Mortgagee user if

- A contact was accidentally enabled as a Mortgagee user
- The Mortgagee user is associated with a duplicate contact
- You do not want a contact to access the FHA Catalyst in the future

To disable a Mortgagee User account:

1. On the User Institution Page select appropriate blue hyperlink of Full Name of User.
2. Click the Disable Customer User button once confirmed it is the correct User.

![Figure 17: Disable a User](image)

4.5 Deactivate a Mortgagee User Account

The feature is for Deactivating a Mortgagee user account.

Deactivation is not allowed in certain case

- if there is Case owned by this user
- set as an approver for certain tasks
- referenced in custom settings
- Workflows email recipients......etc.

Once the above listed references are settled, deactivate the user account for good. Mean time use the freeze option to prevent user from logging in.

Compared with Disable feature, we recommend using deactivate feature to deactivate a Mortgagee user if you may reactivate the Mortgagee user in the future.

To deactivate a Mortgagee User account:
1. On the Manage Permissions Page, sort to find the Mortgagee User by name; once you have confirmed it is the correct user, click on the icon for the **dropdown list of the user** and then click **Deactivate a User**.

![Figure 18: Deactivate a User](image1)

![Figure 19: Activate an inactive User](image2)
5. Getting Help

For further assistance, please contact the FHA Resource Center:

- E-mail 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 Standard Time), Monday through Friday on all non-Federal holidays.