FHA Catalyst: Mortgagee Administrator Role

User Guide

U.S. Department of Housing and Urban Development

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Solution Information

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Document History

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1.0	11/01/2021	OCIO	
1.1	02/10/2022	HUD Contractor	Added SFDMS functionality
1.2	03/22/2022	HUD Contractor	Added notes on page 12 for SFDMS permission set assignments
1.3	9/30/2022	HUD Contractor	Added update for 'M ID' field update for SFH Claims users
1.4	2/10/2023	HUD Contractor	Added information concerning the automated account freeze process
1.5	3/23/2023	HUD Contractor	Grammar changes
1.6	7/12/2023	HUD Contractor	Added Relationship to Mortgagee, 508 compliance, language updated for clarity

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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 **buttons** that the user needs to select will appear in **bold.**
3. Screenshots show each page or window involved in the task.
4. The screenshot may also include boxes, lines, and labels that show which part of the page is important.

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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 Becoming a Mortgagee Administrator

User access for FHA-approved Mortgagees is managed by Mortgagee Administrators for the institution. To add or remove a Mortgagee Administrator, 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.

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** *Catalyst* Landing Page. The option will take the Mortgagee Administrator to the Institution Users Page, where all users in their organization are displayed on the dropdown list under their **Username** on the *FHA*.

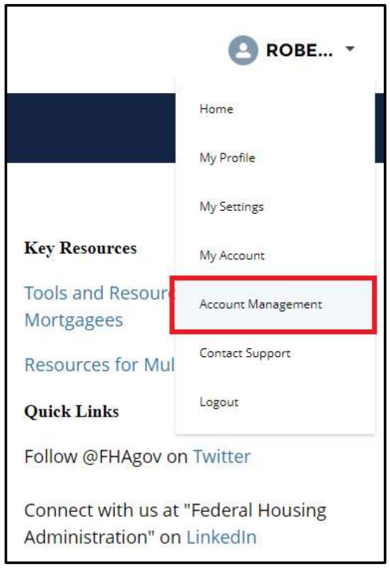


Figure 1: FHA Catalyst Home Page – Account Management

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 **Account Management** from the menu to access the Account Management page.

2.3 Account Management Page

1. The Account Management page allows Mortgagee Administrators to manage their institution's users and onboard new users. It has three tabs, starting with Institution Users.

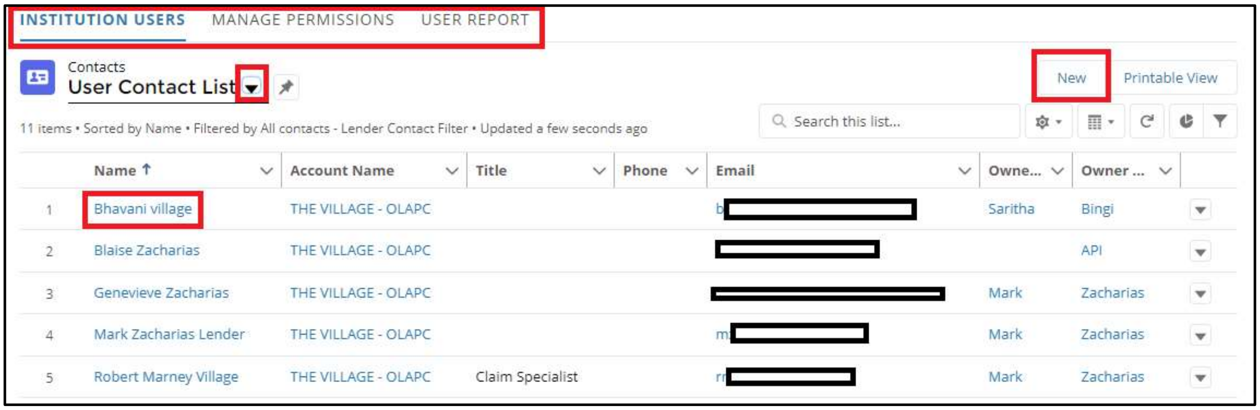


Figure 2: Institution Users Tab

2. The **Institution Users tab** lists contacts in your institution. Each Contact record is associated with exactly one user.
   - To sort users, select the name of the column header. The arrow next to the column header indicates whether the field is sorted ascending or descending.
   - To update your filter criteria, select a view using the drop-down next to the title. For example, the “User Contact List” view includes all users in your institution.
   - To make a filter the default view every time you navigate to the page, select the Pin icon next to the drop-down.
   - To view or edit a user’s contact information, select their Name to navigate to the Contact page. (See section 4 for details.)
   - To view your lender account’s information, select the Account Name to navigate to the Account page. (To change this information, contact HUD.)
3. The **New** button allows the Mortgagee Administrator to create a new User Contact in the institution. (See section 3 for details.)
4. The **Printable View** button allows the Mortgagee Administrator to run a partial report of users in the institution, depending on the current filter.

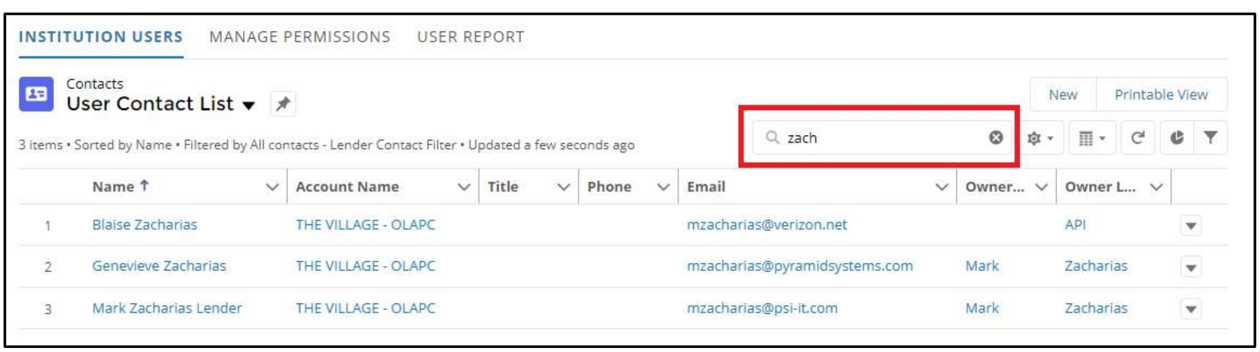


Figure 3: Search Bar

5. **The Search bar** allows the Mortgagee Administrator to search for a specific user. Enter two or more letters in the search bar and place a space between them, then press **Enter** to search.

- 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.

6. The **Manage Permissions tab** displays a list of users in your institution and provides access to common administrative actions.
    - To sort users, select the name of the column header. The arrow next to the column header indicates whether the field is sorted ascending or descending.
    - To grant or remove a user's roles in different FHA Catalyst modules, select "Manage Permissions" from the drop-down next to the user's name. (See section 3.3 for details.)
    - To activate or deactivate a user or to reset their password, select the corresponding option from the drop-down next to the user's name. (See section 4 for details.)

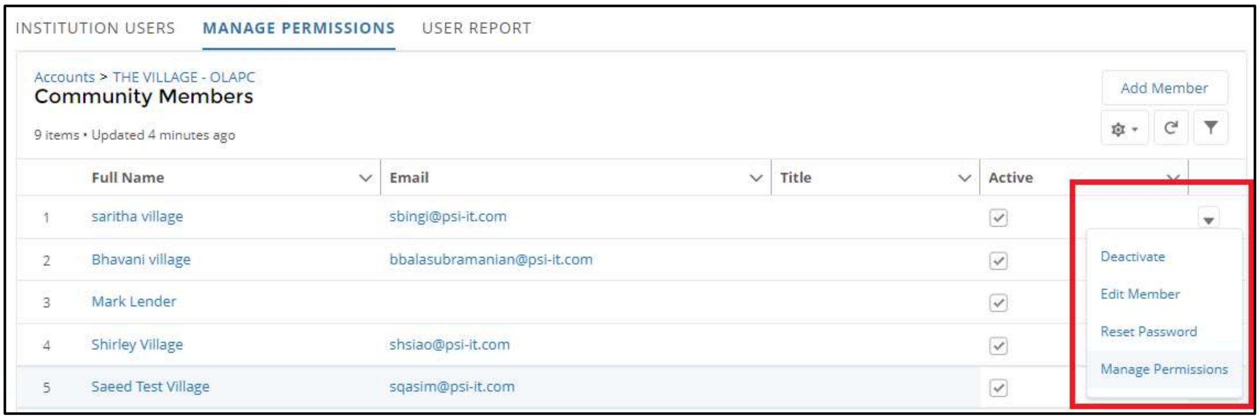
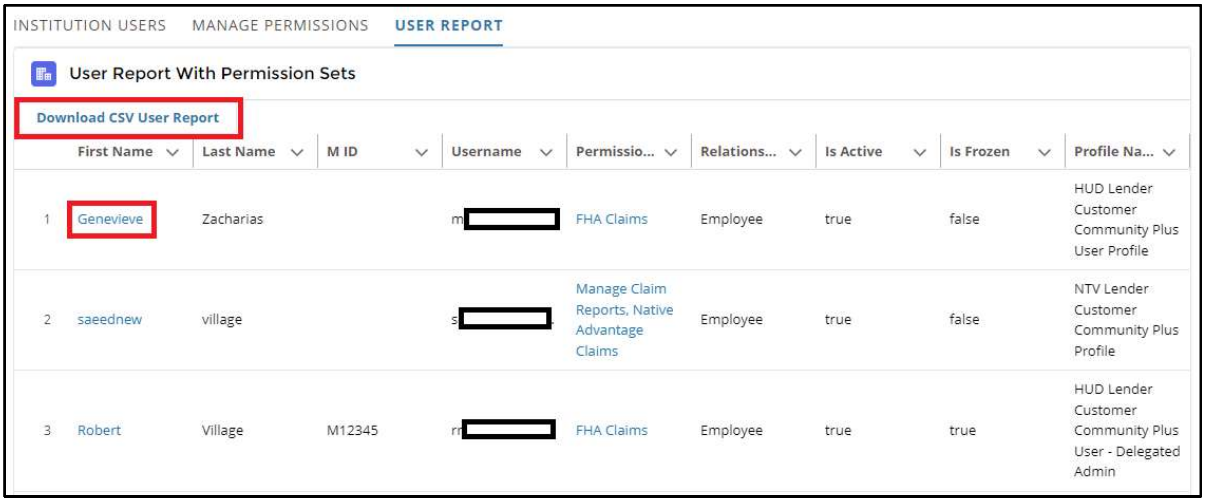


Figure 4: Manage Permissions Tab

7. The **User Report tab** displays a combined report of all users in your institution with both contact information and user permissions.
    - To sort users, select the name of the column header. The arrow next to the column header indicates whether the field is sorted ascending or descending.
    - To edit a user's contact info, select their First Name. (See section 3.1 for details.)
    - To download the contents of this tab as a CSV file for analysis in Microsoft Excel or similar products, select "Download CSV User Report".



	First Name	Last Name	M ID	Username	Permissio...	Relations...	Is Active	Is Frozen	Profile Na...
1	Genevieve	Zacharias		[redacted]	FHA Claims	Employee	true	false	HUD Lender Customer Community Plus User Profile
2	saeednew	village		[redacted]	Manage Claim Reports, Native Advantage Claims	Employee	true	false	NTV Lender Customer Community Plus Profile
3	Robert	Village	M12345	[redacted]	FHA Claims	Employee	true	true	HUD Lender Customer Community Plus User - Delegated Admin

Figure 5: User Report Tab

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3. Onboarding a new User

This section illustrates how a Mortgagee Administrator onboards a new User for their organization. Onboarding a new user is a three-step process: first create a contact, then a customer user, then assign permission sets. To manage existing users, see section 4.

Step 1.

Create the Mortgagee User as a Contact (set up their contact information).

Step 2.

Assign the Mortgagee User a username (enable them as a Customer User).

Step 3.

Assign the Mortgagee User the applicable FHA Catalyst user roles/permission sets.

NOTE: To add a new Mortgagee Administrator to your institution, **do not onboard the user in FHA Catalyst.** Instead, set up the user as a Coordinator in the *FHA Connection* system. The user will automatically be created in FHA Catalyst and will be able to manage their own contact information and permissions.

3.1 Create a new Contact record for the User

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

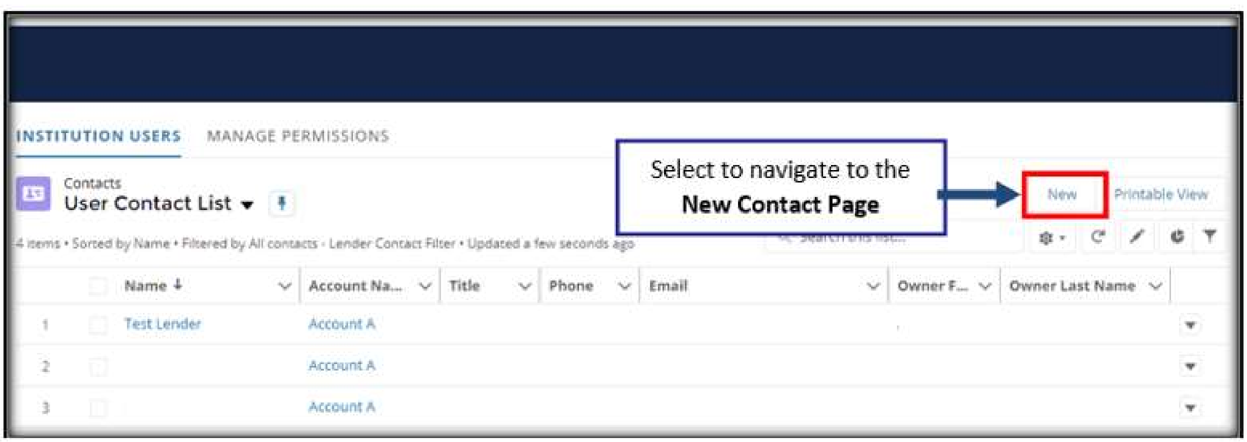

Figure 6: Onboard a New User

2. The New Contact Screen is displayed, which allows the Mortgagee Administrator to enter **Contact Information** for the new Mortgagee User.

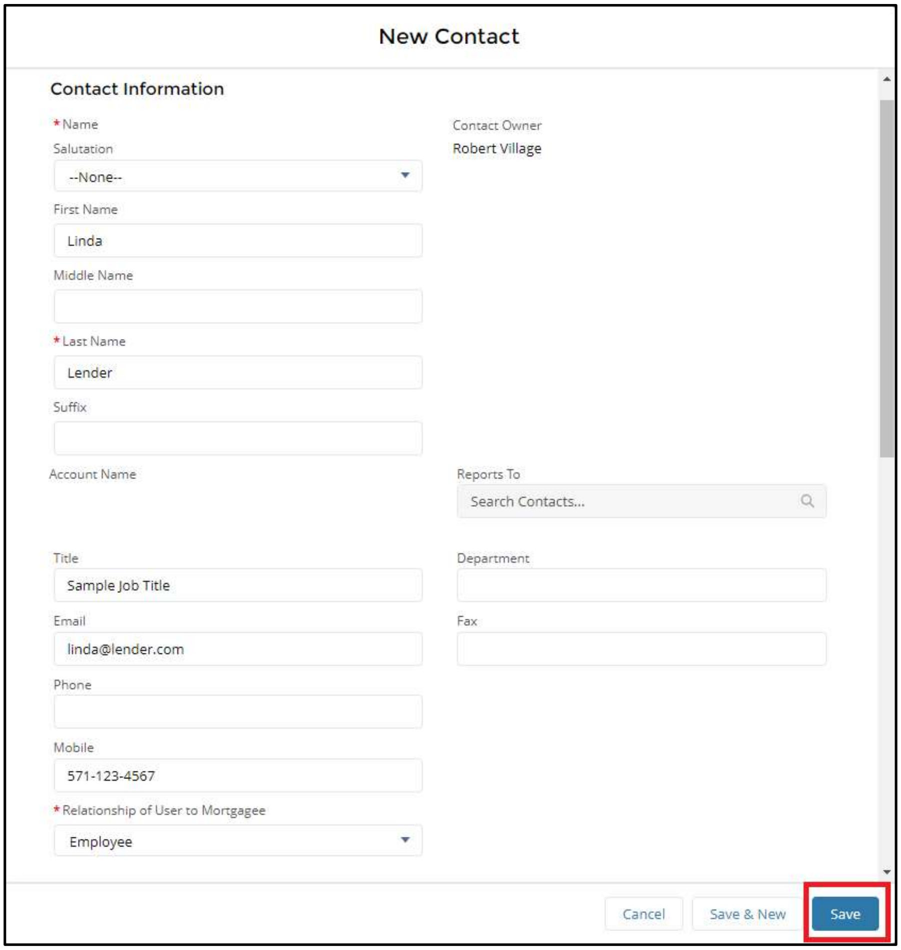

Figure 7: New Contact Screen

3. Enter Contact First Name, Last Name, Email, Relationship to Mortgagee, and any other desired information.
    a. Required fields are marked with a red asterisk.
    b. **FHA Claims Users:** For users who will be submitting FHA Claims, you must populate the ‘M ID’ field under the ‘Additional Information’ section at the bottom of the Contact record, and you must enter ‘Employee’ in the ‘Relationship to Mortgagee’ drop-down.
        i. Note: This ‘M ID’ field is the FHA Connection ID# / Mainframe ID / M-ID. It would have a format like "MXXXXX".

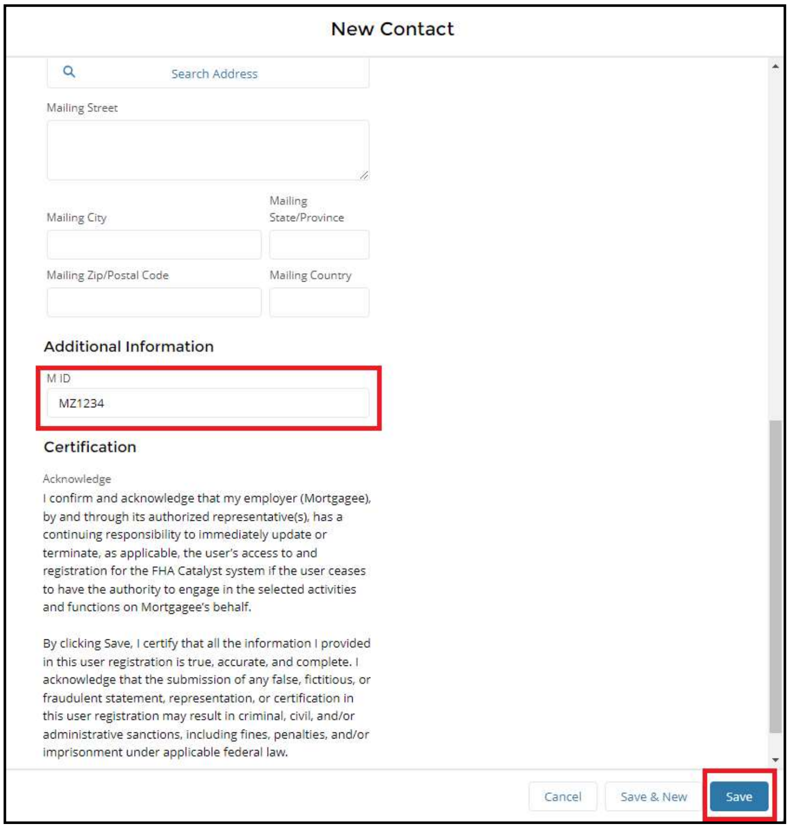

Figure 8: New Contact – MID and Certification

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.

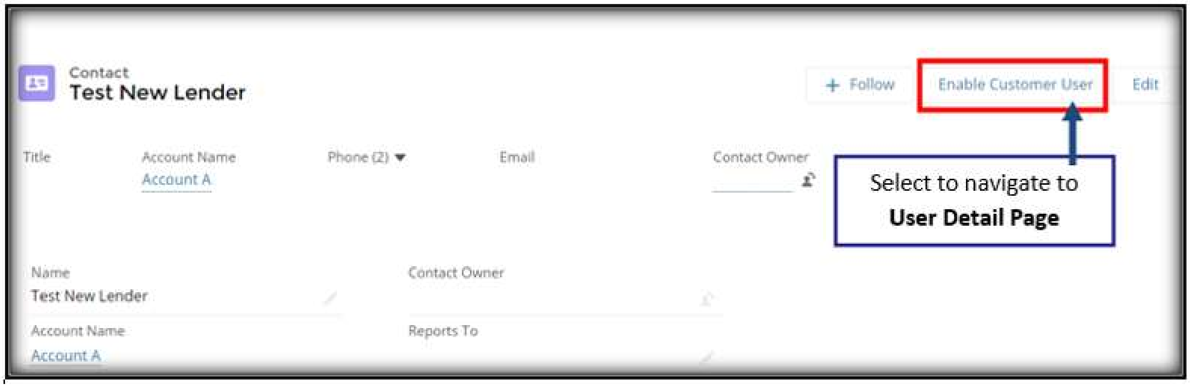

Figure 9: Contact Detail Page

2. Enter the **Email Address**, **Alias**, **Username**, and **Nickname** for the Mortgagee User.

3. **Username Format** – This is the username 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 their Password.

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

5. The Profile should be **HUD Lender Customer Community Plus User Profile.**

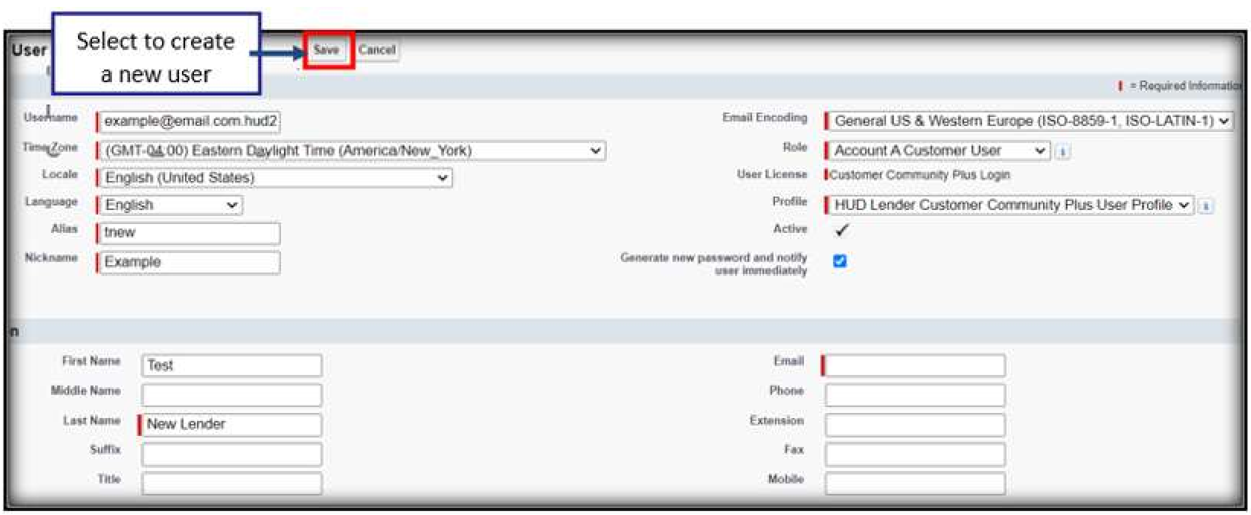

Figure 10: User Detail Page

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, select the **dropdown list for the user** and then select **Manage Permissions**.

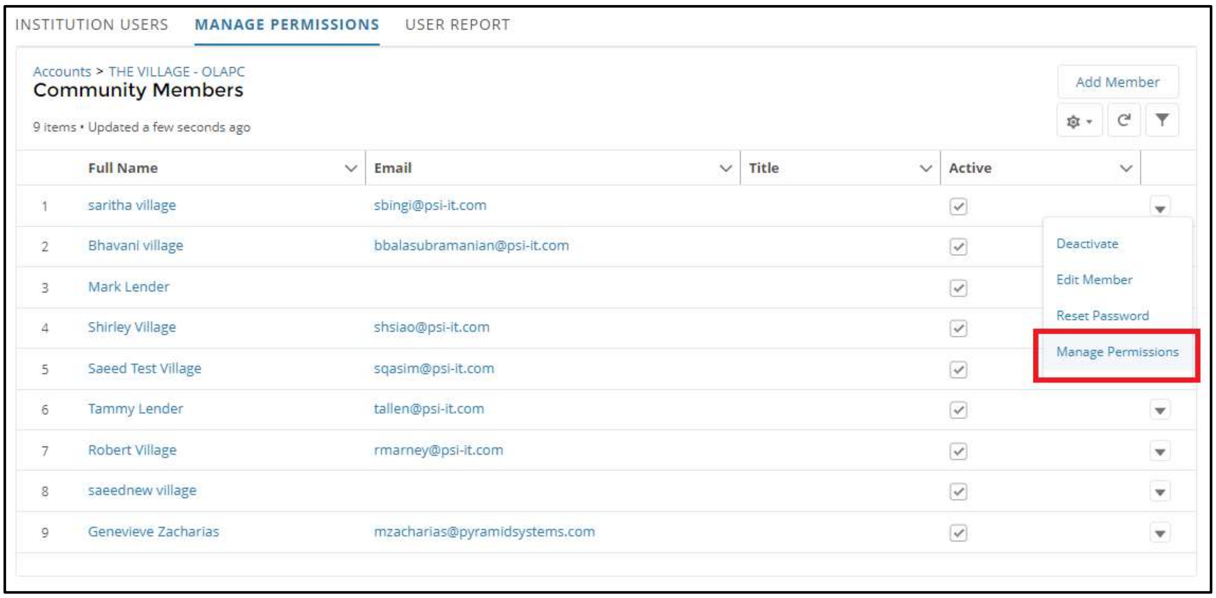

Figure 11: Manage Permissions Menu Option

3. On the **Edit Assignments Screen** select the Permission Set for the desired application(s) 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.

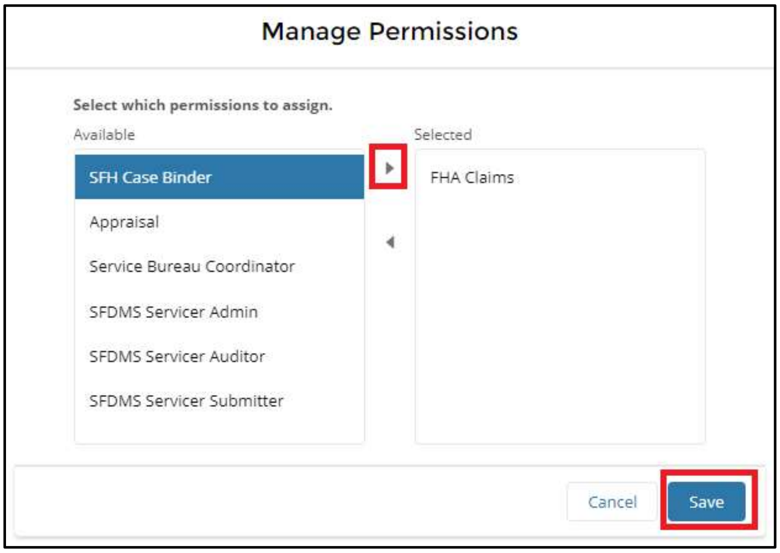

Figure 12: Edit Assignment Screen

The table below indicates the appropriate permission set(s) for each FHA Catalyst Module:

Module	Role	Permission Set Assignment
Appraisal	Mortgagee User	Appraisal
Appraisal	Service Bureau Coordinator	Appraisal, Service Bureau Coordinator
Single Family Housing Case Binder	Mortgagee User	SFH Case Binder
Multi-Family Housing Case Binder	Mortgagee User	MFH Case Binder
Claims	Mortgagee User	FHA Claims
Loan Origination	Mortgagee User	Loan Origination
SFDMS	Mortgagee User	SFDMS Servicer Admin SFDMS Servicer Submitter SFDMS Servicer Auditor ***NOTE: Select only one option**

***NOTE: Select only one SFDMS permission set for a user. Do not assign more than one.**

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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. This is typically also the first step of removing a user from the system since a user can be frozen even if they have work in progress.
- **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** – Lock a user out and release their license until they are reactivated. This is typically the last step of removing a user from the system since it requires the user to have no work in progress, including any open Case Binder cases.

4.1 Edit Contact information for a Mortgagee User

1. In the Institution Users tab, select the **Name** of the Mortgagee User to open the Contact Detail page.
2. Either select **Edit icon** or **Edit** button to change Contact Information for the Mortgagee User.

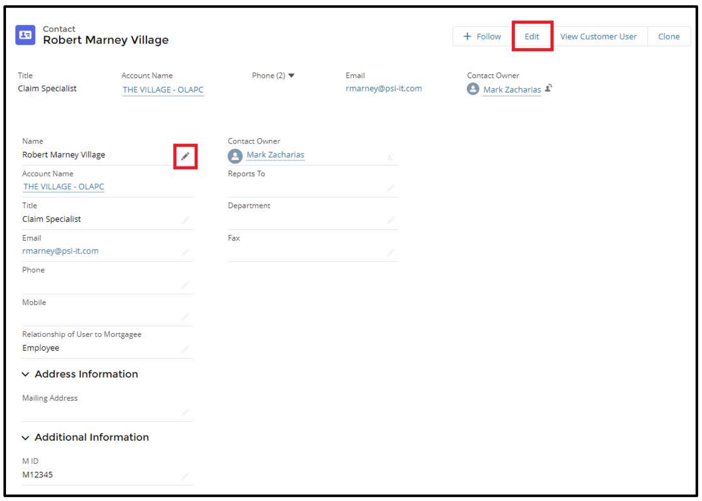

Figure 13: Contact Detail Page

4.2 Reset a Password for a Mortgagee User

Mortgagee Administrators can reset passwords for Mortgagee Users in their institution. The Mortgagee User **MUST** be in **active status** (not *frozen* or *deactivated* 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**.

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

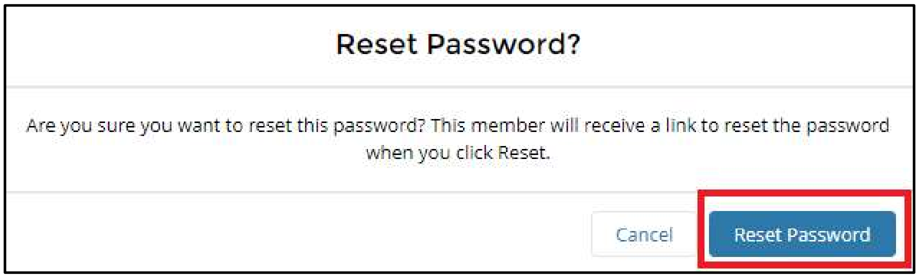

Figure 14: Reset Password

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 one-time link is only valid for 24 hours. If it expires, the password must be reset again.

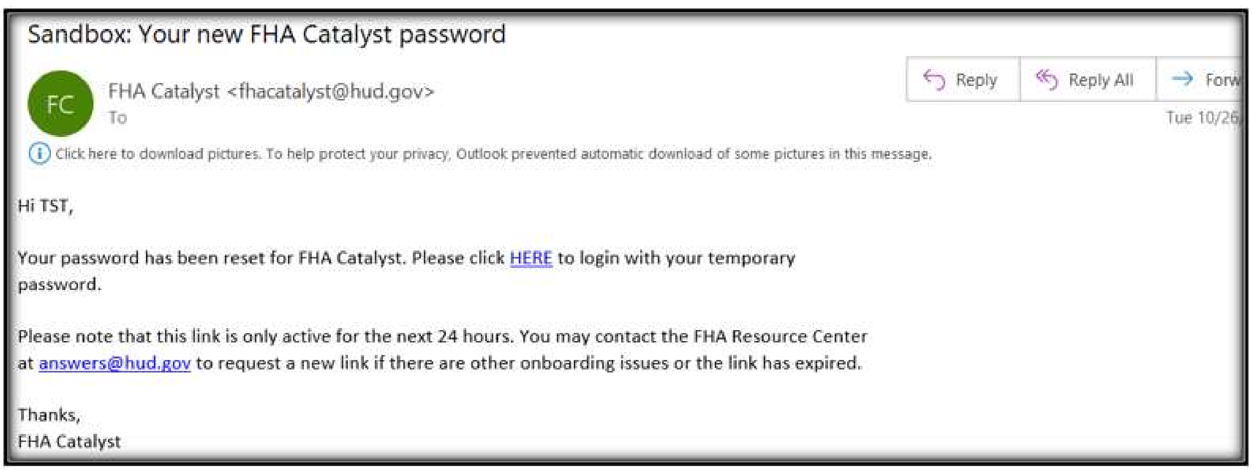

Figure 15: Password Reset Notification Email for Users

4.3 Freeze/Unfreeze a Mortgagee User Account

4.3.1 Manually Freezing a User's Account

Mortgagee Administrators can freeze a user's account to temporarily suspend them and prevent them from logging in. A frozen user can be unfrozen and returned to active status at any time. This makes freezing a user a good solution for returning users, short-term contractors, or situations where the user can't be deactivated because they still have active cases or responsibilities in the system (such as being an approver for certain tasks). However, a frozen user still uses a license.

To freeze a Mortgagee User account:

1. On the Manage Permissions tab, select the **Full Name** of the User.

2. Click **Freeze/Unfreeze** button once confirmed it is the correct User.

Figure 16: Freeze the Mortgagee User

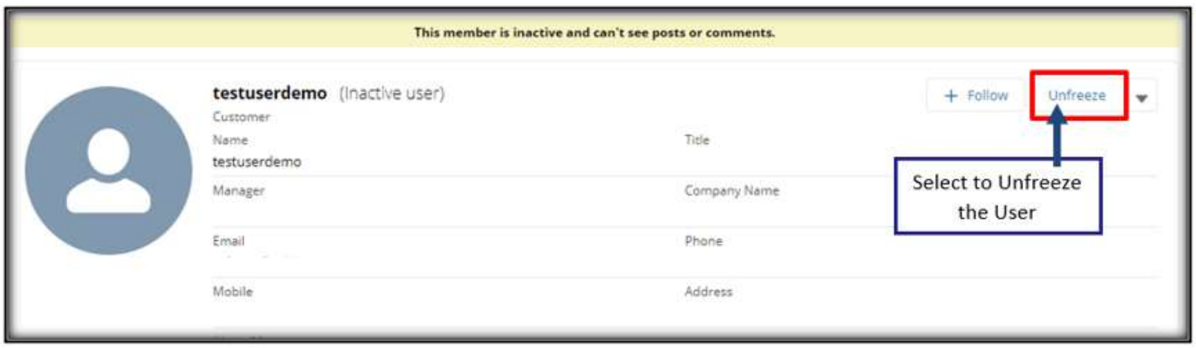

Figure 17: Unfreeze the Mortgagee User

4.3.2 Automatic Freezing of Users' Accounts

Users who have not accessed the system in 90+ days, and Mortgagee Administrators who are terminated in FHA Connection, will be automatically frozen by the system. This is a security requirement to help prevent nefarious use of active user accounts. To re-enable the account, simply unfreeze it as described above.

If the Mortgagee Administrator's own account is frozen, contact the FHA Resource Center at answers@hud.gov.

4.4 Disable a Mortgagee User Account

Disabling a Mortgagee user account will permanently disable the "Contact". They cannot be reactivated with their original User record. After a user has been disabled, you must create a new one from scratch - it is not possible to re-enable a disabled User record. This makes disabling a good choice for duplicate contacts or accidentally created users, not for employees entering or leaving the institution.

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 confirming it is the correct User.

Figure 18: Disable Customer User

4.5 Deactivate a Mortgagee User Account

The feature is for Deactivating a Mortgagee user account. This prevents the user's login, prevents them from being assigned new work, and frees up their license. However, they can still be reactivated later. This makes deactivation a good choice for users leaving the institution.

NOTE: Deactivation is not allowed if:

- There are Cases owned by this user (such as open or in-progress Case Binder cases)
- The user is an approver for certain tasks.
- The user is referenced in custom settings.
- The user is a recipient of an email in a Workflow.
- Other similar cases where policy or data refers to the user.

Once the above listed references are settled, deactivate the user account for good. In the meantime, use the freeze option to prevent the user from logging in. (See section 4.3 for details.)

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**.

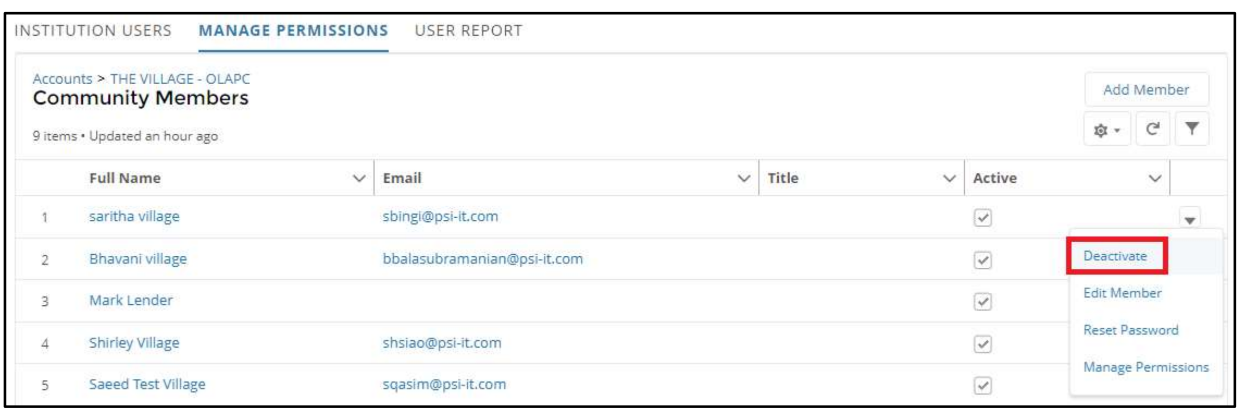

Figure 19: Deactivate a User

To reactivate a Mortgagee User account follows a similar process: click on the icon for the **dropdown list of the user** and then click **Activate**.

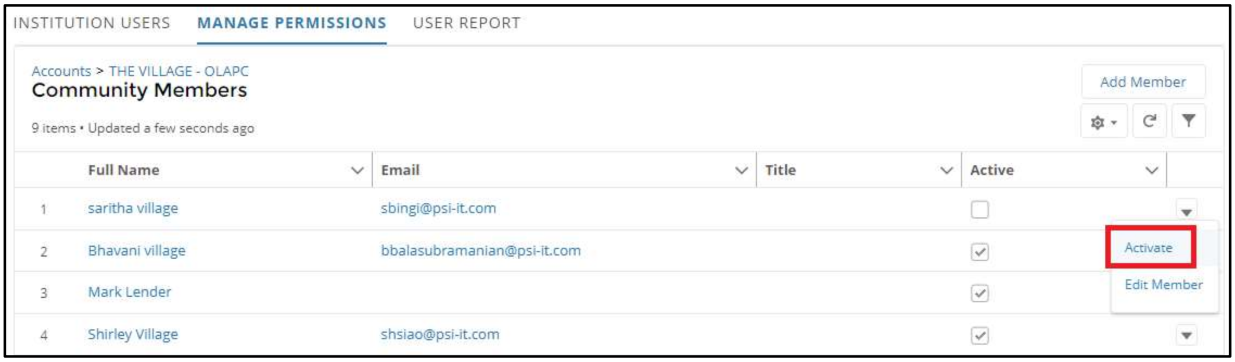

Figure 20: Reactivate an Inactive User

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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.

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