



FHA Catalyst: Case Binder Module

User Guide Change Overview

U.S. Department of Housing and Urban Development

May 2024

Release 7.32



Solution Information

	Information
Solution Name	FHA Catalyst: Case Binder Module
Solution Acronym	N/A
Release Number	7.32

Change Overview

Section Title	Description	Figure Link
Case Binder Home Page	<ul style="list-style-type: none"> ➤ Create Tab no longer exists. The functionality now exists as a Create Case binder tab (located next to the binder Tab). ➤ Submission Type and FHA Case Number was removed from the view. Address Field, Last Modified Date, Case Binder was added to the list views 	Figure 1- Case Binder Landing Page
Creating a Case Binder	<ul style="list-style-type: none"> ➤ Create Tab no longer exists. The functionality now exists as a Create Case binder tab (located next to the binder Tab). ➤ Layout has changed- all data entry and document upload are done on the same screen. ➤ Save and Close Button has been added- this allows the user to save a file but wait to send to FHA, if they need to come back to the file and add additional documents before sending to FHA. ➤ Lenders no longer need to enter in the type, QAD/PUD information, property address, or location. ➤ Connection between FHA Catalyst and FHA Connection has been added. Catalyst will request information from Connection and will display a message to the Lender at the time the Search Button is used, during creation and/or when the Submit button is used during initial submission or NOR Resubmission. 	Figure 2 Case Binder Creation Process
Viewing Binder Details	<ul style="list-style-type: none"> ➤ Create Tab no longer exists. The functionality now exists as a Create Case binder tab (located next to the binder Tab). ➤ Layout has changed- all data entry and document upload are done on the same screen. ➤ Save and Close Button has been added- this allows the user to save a file but wait to send to FHA, if they need to come back to the file and add additional documents before sending to FHA. ➤ Lenders no longer need to enter in the type, QAD/PUD information, property address, or location. 	Figure 3 Binder Data Screen



	<ul style="list-style-type: none">➤ Connection between FHA Catalyst and FHA Connection has been added. Catalyst will request information from Connection and will display a message to the Lender at the time the Search Button is used, during creation and/or when the Submit button is used during initial submission or NOR Resubmission.	
Viewing Case Binder Details	<ul style="list-style-type: none">➤ A new section was added to the Case Binder Screen. This section will show all Binders that have been associated with the FHA Case Number.	Figure 4 Case Binder Data Screen



Case Binder Home Page

Description

- Create Tab no longer exists. The functionality now exists as a Create Case binder tab (located next to the binder Tab).
- Submission Type and FHA Case Number was removed from the view. Address Field, Last Modified Date, Case Binder was added to the list views

Top Picture- Old Version

CASE BINDERS CREATE

Case Binders
All My Case Binders

4 items • Sorted by ID • Filtered by All case binders • Record Type • Updated a few seconds ago

ID ↑	FHA Case Number	Borrower Name	Status	Submission Type	
1	CB-612504	421-5901750	Test FileUpload	Submitted	Forward Initial Submission
2	CB-612510	049-1893833	DW Demo One	Submitted	Forward Initial Submission
3	CB-612511	010-4053865	DW Demo Two	Submitted	Forward Initial Submission
4	CB-612512	010-4053865	DW Test Three	Submitted	Forward NOR Resubmission

Bottom Picture- New Version

FHA CATALYST

BINDERS CREATE CASE BINDER

Binders
All My Endorsement Binders

4 items • Sorted by Binder Link • Filtered by All binders • Record Type, Lender Running User

Binder Link ↑	Case Binder	Status	Borrower Na...	Property Ad...	Last Modified Date
1	023-9596072 Endorsement	CB-595908	Submitted		5/6/2024 5:30 PM
2	023-9596072 LRS	CB-595908	Submitted		5/13/2024 6:52 PM
3	023-9596072 Endorsement	CB-595908	NOR		5/3/2023 4:41 PM
4	023-9596072 Endorsement	CB-595908	NOR		2/28/2023 3:07 PM

Figure 1- Case Binder Landing Page



Creating a Case Binder

Description

- Create Tab no longer exists. The functionality now exists as a Create Case binder tab (located next to the binder Tab).
- Layout has changed- all data entry and document upload are done on the same screen.
- Save and Close Button has been added- this allows the user to save a file but wait to send to FHA, if they need to come back to the file and add additional documents before sending to FHA.
- Lenders no longer need to enter in the type, QAD/PUD information, property address, or location.
- Connection between FHA Catalyst and FHA Connection has been added. Catalyst will request information from Connection and will display a message to the Lender at the time the Search Button is used, during creation and/or when the Submit button is used during initial submission or NOR Resubmission.

- Our records indicate that the FHA Case Number you entered is not associated with a case binder that was requested by FHA. Please ensure that you have entered the correct case number.
- "The binder cannot be submitted because this case number is cancelled. "
- "This case binder has already been submitted."
- "This case number is associated with an FHA Approved eCaseBinder Lender. The binder must be submitted through the FHA Connection eCaseBinder process."
- "This case number is associated with an FHA Approved eCaseBinder Lender. The binder must be submitted through the FHA Connection eCaseBinder process."
- "Insurance Application Screen in FHA Connection must be completed prior to binder submission.
- "Our records indicate that the FHA Case Number you entered is not associated with a case binder that was requested by FHA. Please ensure that you have entered the correct case number."
- "Our records indicate that the FHA Case Number you entered is not associated with a case binder that was requested by FHA. Please ensure that you have entered the correct case number."
- "Our records indicate that the FHA Case Number you entered is not associated with a case binder that was requested by FHA. Please ensure that you have entered the correct case number."
- "Second Appraisal Must Be Logged Prior To Binder Submission"
- "The appraisal has not been logged in FHA Connection. Please complete Appraisal Logging prior to binder submission."
- Our records indicate that FHA Case Number, #####, is not associated with a case binder requested by FHA. Please ensure that you entered the correct case number.
- This case binder has already been submitted. Case Binder already exists for this Case Number. [Click here to view.](#)

Top Picture- Old Version



CASE BINDERS CREATE

* FHA Case Number

* Borrower Name

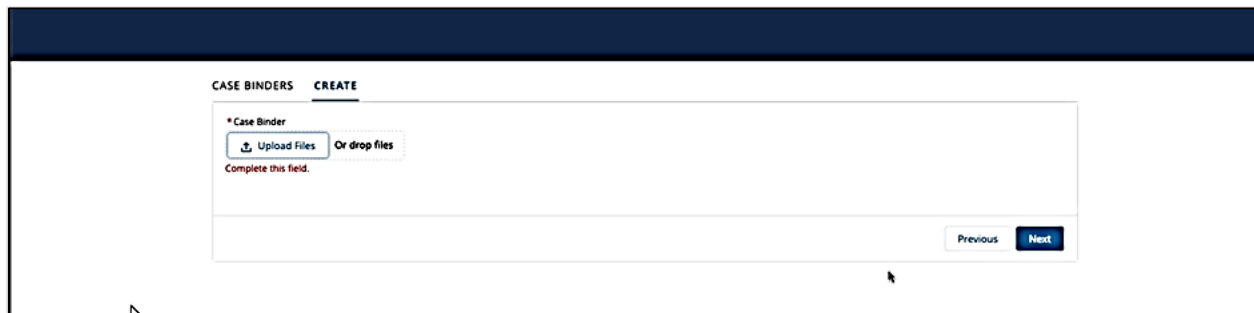
* Location
Select

Loan Number

* Submission Type
Forward Initial Submission

Comments

Next



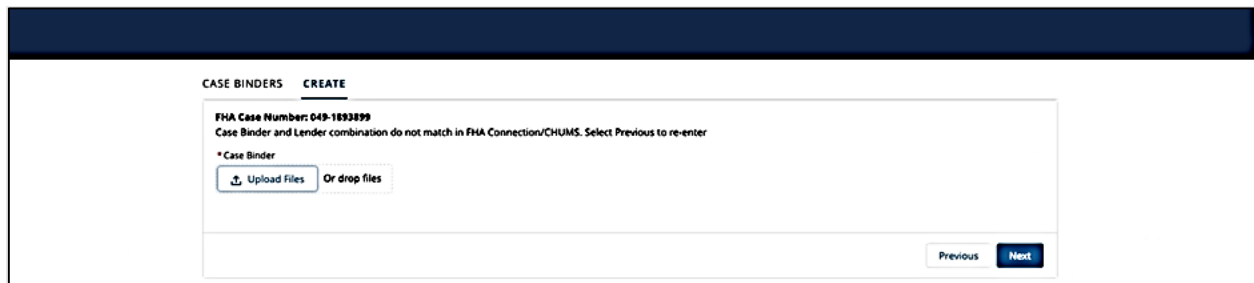
CASE BINDERS CREATE

* Case Binder

Upload Files Or drop files

Complete this field.

Previous Next



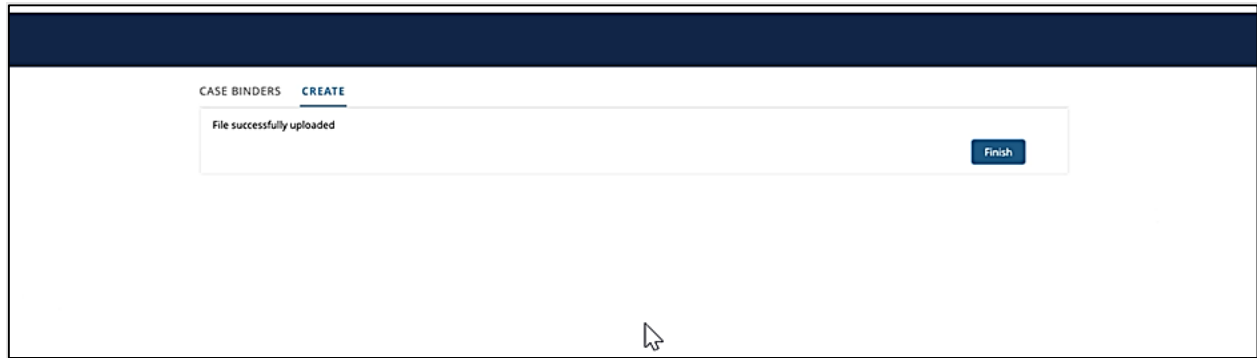
CASE BINDERS CREATE

FHA Case Number: 049-1893899
Case Binder and Lender combination do not match in FHA Connection/CHUMS. Select Previous to re-enter

* Case Binder

Upload Files Or drop files

Previous Next



Bottom Picture- New Version

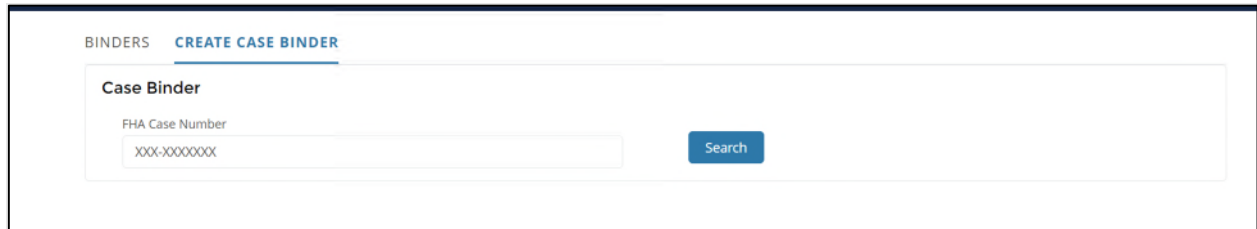


Figure 2 Case Binder Creation Process



Viewing Binder Details

Description

- Create Tab no longer exists. The functionality now exists as a Create Case binder tab (located next to the binder Tab).
- Layout has changed- all data entry and document upload are done on the same screen.
- Save and Close Button has been added- this allows the user to save a file but wait to send to FHA, if they need to come back to the file and add additional documents before sending to FHA.
- Lenders no longer need to enter in the type, QAD/PUD information, property address, or location.
- Connection between FHA Catalyst and FHA Connection has been added. Catalyst will request information from Connection and will display a message to the Lender at the time the Search Button is used, during creation and/or when the Submit button is used during initial submission or NOR Resubmission.

Top Picture- Old Version

The screenshot shows the 'Old Version' of the binder details screen. It features a header with a binder icon and the text 'Case Binder CB-612514'. Below this, there are two columns of form fields. The left column includes: 'FHA Case Number' (049-1893899), 'Borrower Name' (Cindy Borrower), 'Submission Type' (Forward Initial Submission), 'Created By' (Tom James, 11/28/2023 4:42 PM), and 'Last Modified By' (Tom James, 11/28/2023 4:42 PM). The right column includes: 'Loan Number' (33333), 'Lender Name' (Happy Homes), 'Lender ID' (13065), 'Location' (Denver), 'Status' (Submitted), and 'Status Date' (11/28/2023 4:42 PM). At the bottom, there is a 'Download File' button with a download icon, a file name 'test.docx', and two buttons labeled 'Back' and 'Delete'.

Bottom Picture- New Version

The screenshot shows the 'New Version' of the binder details screen. It features a header with a binder icon and the text 'Binder B-001862'. Below this, there are two columns of form fields. The left column includes: 'Binder Name' (B-001862), 'Type' (Endorsement), 'Status' (Submitted), and 'Program Type' (Forward). The right column includes: 'Case Number' (023-9596072), 'Case Binder' (CB-595908), and 'Comments' (Data migration 4-24-24). At the bottom, there is a 'Download File' button with a download icon, a table with three columns: 'File Name', 'File Type', and 'Uploaded Date'. The table contains one row: 'Nor resubmission test.docx', 'NOR Resubmission', and 'May 2, 2024, 3:07:51 PM'.

Figure 3 Binder Data Screen




Viewing Case Binder Details


Description





- A new section was added to the Case Binder Screen. This section will show all Binders that have been associated with the FHA Case Number.

New Version

 Case Binder
CB-595908

FHA Case Number 023-9596072	Loan Number
Borrower Name	Property Address
Secondary Lender Name	Lender Name
Program Type Forward	Lender ID 29382
	Location Santa Ana

 Binders (4)

Binder Link	Type	Status
023-9596072 Endorsement	Endorsement	Submitted 
023-9596072 LRS	LRS	Submitted 
023-9596072 Endorsement	Endorsement	NOR 
023-9596072 Endorsement	Endorsement	NOR 

[View All](#)

Figure 4 Case Binder Data Screen