

FHA Catalyst: Mortgagee Administrator Role

User Guide

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Table of Contents

1.	Overview - FHA Catalyst: Mortgagee Administrator Role 1
	1.1 Navigating the FHA Catalyst: Mortgagee Administrator Role User Guide
2.	Getting Started 2
	2.1 Becoming a Mortgagee Administrator
	2.2 FHA Catalyst Landing Page 2
	2.3 Account Management Page
3.	Onboarding a new User
	3.1 Create a new Contact record for the User
	3.2 Assign the User a Username to access the FHA Catalyst platform 10
	3.3 Assign the User the applicable Permission Set 12
4.	Manage Users 16
	4.1 Edit Contact information for a Mortgagee User
	4.2 Reset a Password for a Mortgagee User 17
	4.3 Freeze/Unfreeze a Mortgagee User Account
	4.3.1 Manually Freezing a User's Account
	4.4 Disable a Mortgagee User Account
	4.5 Deactivate a Mortgagee User Account 19
	4.5.2 Automatic Deactivation of Users' Accounts
5.	Binder Management 21
	5.1 Assign binder ownership to a Mortgagee User 21
6.	Getting Help 23



Table of Figures

Figure 1: FHA Catalyst Home Page – Account Management	2
Figure 2: Institution Users Tab	
Figure 3: Search Bar	4
Figure 4: Manage Permissions Tab	5
Figure 5: User Report Tab	5
Figure 6: Onboard a New User	7
Figure 7: New Contact Screen	8
Figure 8: New Contact – MID and Certification	10
Figure 9: Contact Detail Page	11
Figure 10: User Detail Page	12
Figure 11: Manage Permissions Menu Option	13
Figure 12: Edit Assignment Screen	
Figure 13: Contact Detail Page	
Figure 14: Reset Password	
Figure 15: Password Reset Notification Email for Users	
Figure 16: Freeze the Mortgagee User	
Figure 17: Unfreeze the Mortgagee User	
Figure 18: Disable Customer User	
Figure 19: Deactivate a User	20
Figure 20: Reactivate an Inactive User	20
Figure 21-Landing Page Manage Binders	22
Figure 22-Binder List	22
Figure 23-Assign a New Owner	23
Figure 24-Start Over- End Process	



FHA Catalyst: Mortgagee Administrator Role



1. Overview - FHA Catalyst: Mortgagee Administrator Role

The Mortgagee Administrator Role has been established 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 <u>return to table of contents</u> 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.



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 a new Mortgagee Administrator, set up a user with the Coordinator role in the *FHA Connection* system. The user's Mortgagee Administrator account will be created or updated in FHA Catalyst within 24 hours.

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** in the system.

	ROBE •
	Home
	My Profile
	My Settings
Key Resources	My Account
Tools and Resourc Mortgagees	Account Management
Resources for Mul	Contact Support
Quick Links	Logout
Follow @FHAgov o	n Twitter
Connect with us at Administration" on	"Federal Housing LinkedIn

Figure 1: FHA Catalyst Home Page – Account Management

- 1. The FHA Catalyst Landing Page contains the following 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.
 <u>Return to table of contents</u>
- **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, onboard new users and assign or reassign Owners of Case Binders and Servicing Binders. It has three default tabs and an optional fourth tab (based on Permission Sets), starting with Institution Users.

INSTITUTION USERS MAN	IAGE PERMISSIONS US	ER REPORT BINDER MANAG	EMENT	
Warning: For Delegated Admins, plea	se update user information in Fl	HA Connection, which is the system o	f record.	
Contacts User Contact List	Ŧ			New Printable View
3 items • Sorted by Name • Filtered by All co	ntacts - Lender Contact Filter • Upda	ted 6 minutes ago	Q Search this list	\$ • ■ • ℃ € ▼
Name ↑	✓ Account Name ✓	Adminis \checkmark Title \checkmark Phone	✓ Email	∨ 0w ∨ 0w ∨
1 Administrative Contact		v		
2 Administrative Contact		State		<u> </u>
3		o		1 · •



- 2. The **Institution Users tab** lists contacts in your institution. Each Contact record is associated with exactly one user.
- 3. 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.
- 4. 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.
- 5. To make a filter the default view every time you navigate to the page, select the Pin icon next to the drop-down.
- 6. To view or edit a user's contact information, select their Name to navigate to the Contact page. (See section 4 for details.)
- 7. To view your lender account's information, select the Account Name to navigate to the Account page. (To change this information, contact HUD.)



8. The **New** button allows the Mortgagee Administrator to create a new User Contact in the institution. (See section 3 for details.)

The **Printable View** button allows the Mortgagee Administrator to run a partial report of users in the institution, depending on the current filter.





- 9. **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.
- 10. 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.
- 11. The **Manage Permissions tab** displays a list of users in your institution and provides access to common administrative actions.
- 12. 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.
- 13. 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.)
- 14. 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.)



INSTITU	TION USERS MANAGE PERMISS	ION	USER REPORT							
Accour Com 9 items	Accounts > THE VILLAGE - OLAPC Community Members 9 Items • Updated 4 minutes ago									
	Full Name	\sim	Email ~	,	Title V	Active	×			
1	saritha village		sbingi@psi-it.com			v				
2	Bhavani village		bbalasubramanian@psi-it.com			V	Deactivate			
3	Mark Lender					V	Edit Member			
4	4 Shirley Village		shsiao@psi-it.com	shsiao@psi-it.com			Reset Password			
5	Saeed Test Village		sqasim@psi-it.com			 Image: A start of the start of	Manage Permissions			

Figure 4: Manage Permissions Tab

15. The **User Report tab** displays a combined report of all users in your institution with both contact information and user permissions.

Return to table of contents

- 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.
- \circ 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".

INSTIT	UTION USERS	MANAGE PERMISSION	S USER REPORT								
	User Report	With Permission Sets									
Download CSV User Report											
	First Name 🗸	🖌 Last Name 🗸 🛛 M ID	∨ Usernam	e v	Permissio 🗸	Relations 🗸	Is Active	\sim	Is Frozen	\sim	Profile Na 🗸
1	Genevieve	Zacharias	m		FHA Claims	Employee	true		false		HUD Lender Customer Community Plus User Profile
2	saeednew	village	s		Manage Claim Reports, Native Advantage Claims	Employee	true		false		NTV Lender Customer Community Plus Profile
3	Robert	Village M12	45 rr		FHA Claims	Employee	true		true		HUD Lender Customer Community Plus User - Delegated Admin

Figure 5: User Report Tab





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.



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

	INSTITUTION USERS MANAGE PERMISSIONS														
4 in											le View				
			Name 4	~	Account Na	\sim	Title 🗸 🗸	Phone	\sim	Email	~	Owner F	\sim	Owner Last Name 🗸	
	1		Test Lender		Account A										¥
	2				Account A										•
L	3				Account A										Y

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

 The New Contact Screen is displayed, which allows the Mortgagee Administrator to enter Contact Information for the new Mortgagee User.
 <u>Return to table of contents</u>

Figure 6: Onboard a New User



	New	Contact		
Contact Information				
*Name		Contact Owner		
Salutation		Robert Village		
None	•			
First Name				
Linda				
Middle Name				
* Last Name				
Lender				
Suffix				
Account Name		Reports To		
		Search Contacts	Q	
Title		Department		
Sample Job Title				
Email		Fax		
linda@lender.com				
Phone				
Mobile				
571-123-4567				
*Relationship of User to Mortgagee				
Employee	•			
				-

Figure 7: New Contact Screen

- 3. Enter Contact First Name, Last Name, Email, and any other desired information.
 - a. Required fields are marked with a red asterisk.



- 4. Enter the **conditionally required fields** Relationship of User to Mortgagee and M ID depending on the type of lender and the user's responsibilities:
 - a. For employees of FHA lenders, set MID to the user's FHA Connection ID # / Mainframe ID / M-ID, and set the Relationship of User to Mortgagee to 'Employee'.
 - i. The MID has a format like 'MXXXXX' and must be unique across all users.
 - ii. The MID is required for all Employees of FHA lenders, except as provided below.
 - b. For employees of Non-FHA lenders (e.g. Section 184 only) or Lender Agents (e.g. appraisal management companies), leave MID blank and set the Relationship of User to Mortgagee to 'Employee'. These organizations are not required to register in the FHA Connection system.
 - c. For contractors who are not authorized to submit data to HUD or who work for multiple lenders, leave MID blank and set the Relationship of User to Mortgagee to 'Contractor'. Even if these users have an MID, it should be entered into FHA Catalyst only when they are an Employee.
 - d. For employees of FHA lenders who have no single-family housing access and only handle MFH (multifamily housing) or ONAP (Office of Native American Programs) data, leave both fields blank. These users are not required to register in FHA Connection.
 - i. If a user's responsibilities include multiple housing types, they must still provide an MID and register as an Employee as described above.



	New	itact			
Q Search A	Address				
Mailing Street					
	Mailing				
Mailing City	State/Province				
Mailing Zip/Postal Code	Mailing Country				
Additional Information					
MID					
MZ1234					
Certification					
Certification					
Acknowledge					
I confirm and acknowledge that	t my employer (Mortgagee),				
by and through its authorized r	epresentative(s), nas a				
terminate as applicable the us	er's access to and				
registration for the EHA Catalys	t system if the user ceases				
to have the authority to engage	e in the selected activities				
and functions on Mortgagee's b	oehalf.				
By clicking Save, I certify that al	I the information I provided				
in this user registration is true.	accurate, and complete. I				
acknowledge that the submissi	on of any false, fictitious, or				
acknowledge that the submissi fraudulent statement, represen	on of any false, fictitious, or itation, or certification in				
acknowledge that the submissi fraudulent statement, represen this user registration may resul	on of any false, fictitious, or ntation, or certification in t in criminal, civil, and/or				
acknowledge that the submissi fraudulent statement, represen this user registration may resul administrative sanctions, incluc	on of any false, fictitious, or ntation, or certification in it in criminal, civil, and/or ding fines, penalties, and/or				
acknowledge that the submissi fraudulent statement, represen this user registration may resul administrative sanctions, incluc imprisonment under applicable	on of any false, fictitious, or htation, or certification in lt in criminal, civil, and/or ding fines, penalties, and/or a federal law.				
acknowledge that the submissi fraudulent statement, represen this user registration may resul administrative sanctions, incluc imprisonment under applicable	on of any false, fictitious, or ntation, or certification in It in criminal, civil, and/or ding fines, penalties, and/or a federal law.		Cancel	Save & New	Sav

Figure **8**: New Contact – MID and Certification

Return to table of contents

- 5. Click the **Save** button. To add multiple Mortgagee Users, click the **Save & New** button.
- 6. 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.



Contact Test New Lender			+	- Follow Enable Customer U	iser Edit
Title Account Name Account A	Phone (2)	▼ Email	Contact Owner	Select to navigate to User Detail Page	2
Name Test New Lender		Contact Owner	£		- 1
Account Name Account A		Reports To			



- 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.
 - For Mortgagee Users of FHA lenders who should also have access to Native Advantage (NTV), contact HUD to complete user setup. FHA Catalyst Mortgagee Administrators cannot add NTV permissions, but they can set up the user and add their FHA permissions. The Profile must still be "HUD Lender Customer Community Plus User Profile" and **not** "NTV Lender Customer Community Plus User Profile" to properly enable access to both systems.



User Selec	ct to create save	Cancel			I = Required Infor
Userhame ex. Timezone (G Locale En Language En Alias Itre Nickname Ex	ample@email.com.hud2 MT-04.00) Eastern Daylight Time (A nglish (United States) nglish V ew cample	merica/New_York)	▼] Ge	Email Encoding Role User License Profile Active nerate new password and notify user immediately	General US & Western Europe (ISO-8859-1, ISO-LATIN-1) Account A Customer User vi Customer Community Plus Login HUD Lender Customer Community Plus User Profile vi v
) First Name Middle Name Last Name Suffix Title	Test			Email Phone Extension Fax Mobile	

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**.



INSTITU	TION USERS MANAGE PERMISSIO	NS USER REPORT					
Accounts > THE VILLAGE - OLAPC Community Members 9 items • Updated a few seconds ago							
	Full Name 🗸	Email	\sim	Title ~	Active	~	
1	saritha village	sbingi@psi-it.com					
2	Bhavani village	bbalasubramanian@psi-it.com			 Image: A start of the start of	Deactivate	
3	Mark Lender				V	Edit Member	
4	Shirley Village	shsiao@psi-it.com				Reset Password	
5	Saeed Test Village	sqasim@psi-it.com			v	Manage Permissions	
6	Tammy Lender	tallen@psi-it.com			~	•	
7	Robert Village	rmarney@psi-it.com			~	•	
8	saeednew village				Image: A start of the start	•	
9	Genevieve Zacharias	mzacharias@pyramidsystems.com			 Image: A start of the start of	•	



- 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.



Select which permissions to assign.			
Available		Selected	
SFH Case Binder	►	FHA Claims	
Appraisal			
Service Bureau Coordinator			
SFDMS Servicer Admin			
SFDMS Servicer Auditor			
SFDMS Servicer Submitter			

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, SFH Delegated Admin		
Multi-Family Housing Case Binder	Mortgagee User	MFH Case Binder		
ONAP Case Binder	Mortgagee User	ONAP Case Binder		
Claims	Mortgagee User	FHA Claims		
SFDMS	Mortgagee User	SFDMS Servicer Admin OR SFDMS Servicer Submitter OR SFDMS Servicer Auditor *NOTE: Select only one option		
NTV Claims	Mortgagee User	Native Advantage Claims *NOTE: Can be set only by HUD		



Note that some modules are managed directly by HUD, not by Mortgagee Administrators. The roles and permission sets for these modules are not visible on this screen. Contact HUD to add these permissions.





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.

Robert Marney	√illage			+ Follow	Edit	View Customer User	Clone
itle Acc Jaim Specialist <u>TH</u>	ount Name E VILLAGE - OLAPC	Phone (2) 🔻	Email rmarney@psi-it.com	Contact Owner	harias £		
Name Robert Marney Village		Contact Owner					
Account Name THE VILLAGE - OLAPC		Reports To					
Title Claim Specialist		Department					
Email rmarney@psi-it.com		Fax					
Phone							
Mobile							
Relationship of User to Mortgag Employee							
 Address Information 	n						
Mailing Address							
 Additional Informat 	ion						
MID							

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.

- 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 <u>Return to table of contents</u> user and then click Reset Password.
- 2. Click Reset Password on the Pop-Up window to continue.

Reset Password?				
Are you sure you want to reset this password? This member will receive a link to reset the password when you click Reset.				
	Cancel	Reset Password		

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.







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 will still be automatically deactivated after 90 days of inactivity.

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.

testuserdemo Customer Name testuserdemo	Title	+ Follow
Manager	Company Name	Select to Freeze the User
Email	Address	
About Me	nouncas	



This member is inactive and can't see po	sts or comments.	
testuserdemo (Inactive user) Customer Name testuserdemo Manager	Title Company Name	+ Follow Unfreeze Select to Unfreeze
Email	Phone	
Mobile	Address	

Figure 17: Unfreeze the Mortgagee User



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.

Return to table of contents

	Contact Smok	e testing 1			+ Follow Edit View Customer User	Disable Customer User 👻
n	itle	Account Name	Phone (2) 💌	Email	Contact Owner	Select to Disable a User
Ŀ	Name Smoke testing	1	Contact Owner		£	

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**.

INSTI	TUTION USERS	MANAGE PERMISSION	USER REPORT							
Acco Co	ounts > THE VILLAGE	- OLAPC mbers						Add I	Membe	er
9 ite	ems • Updated an hour	ago						\$. ~	C	Ŧ
	Full Name	~	Email	~	Title	\sim	Active		\sim	
1	saritha village		sbingi@psi-it.com				 Image: A start of the start of			•
2	Bhavani village		bbalasubramanian@psi-it.com				V	Deactiva	te	
3	Mark Lender						V	Edit Men	nber	
4	Shirley Village		shsiao@psi-it.com				 Image: A start of the start of	Reset Pa	ssword	
5	Saeed Test Villa	ge	sqasim@psi-it.com				 Image: A start of the start of	Manage	Permiss	sions

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**.

Return to table of contents

INSTITU	TION USERS MANAGE PERMISS	IONS USER REPORT				
Accour Com 9 items	nts > THE VILLAGE - OLAPC munity Members • Updated a few seconds ago				4	Add Member
	Full Name	∽ Email	~	Title ~	Active	\sim
1	saritha village	sbingi@psi-it.com				
2	Bhavani village	bbalasubramanian@psi-it.com			Image: A start and a start	Activate
3	Mark Lender				*	Edit Member
4	Shirley Village	shsiao@psi-it.com			V	

Figure 20: Reactivate an Inactive User

4.5.2 Automatic Deactivation 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 deactivated by the system. This is a security requirement to help prevent nefarious use of active user accounts. To re-enable the account, simply reactivate it as described above.



If the Mortgagee Administrator's own account is deactivated, contact the FHA Resource Center at <u>answers@hud.gov.</u>

5. Binder Management

This section illustrates how the Mortgagee Administrator can manage Binder Ownership in their organization. This tab only appears if the Mortgagee Administrator has SFH Delegated Admin permission set. It includes the following Information to help determine which Binders to assign ownership:

After initial page:

- CASE NUMBER- FHA assigned case number
- STATUS- Status of Binder. Values depend on Binder Type
- ASSIGNED TO-Current Mortgagee User who owns the Binder
- TYPE- Binder Type; Servicing, Endorsement, LRS, Test Case, Other

5.1 Assign binder ownership to a Mortgagee User

- 1. In the Manage Binders tab, select the Begin Button
- 2. Either search for the specific case number, using the search this list field or scroll through the list.
 - a. Next to the desired case numbers, click on the radio button (multiple can be updated at one time, but only one assignee can be chosen at one time)
 - b. Click on the Next Button to assign a User

- Either search for the specific user, that you want to assign to the Binder, using the search this list filed or scroll through the list.
 - a. Next to the desired User, click on the radio button (only one user, at a time, can be selected.
 - b. Click on the Next button
- 4. Click on the Start Over button to assign other Binders



INSTITUTION USERS	MANAGE PERMISSIONS	USER REPORT	BINDER MANAGEMENT	
Instructions:				
The following screens will ta	ake you through step-by-step to trar	nsfer in-flight binders fro transfor	m your institution to an active user.	
2. Step 2 - Choose only on	he user to whom you wish to transfe	r the chosen binders. Th	e user must have the 'SFH Case Binder' p	permission set. The user must be active and their
account must NOT be fi	rozen.			
5. Step 5 - This is a confirm	nation step; binders should be succ	essiully transferred.		
Click Begin to proceed.				
				Begin

Figure 21-Landing Page Manage Binders

INSTITUTION USERS	MANAGE PERMISSIONS		R REPORT	PORT BINDER MANAGEMENT				
Instructions: Please choose one or n You can use the 'Search	nultiple binders that yo n this list' to find bind	ou want to assign to a ders by case number c	specific user. To mak r the user.	ke your selection, c	heck each row for each l	binder you wish to	o transfer.	
In-Flight Binders 1 of 1 item • 0 items select	ted				Q Search th	nis list		
Case Number	~	Status	~	Assigned To	~	Туре		~
<u>≵</u> 363		Pending Submission				Servicing		
							Previous	Next

Figure 22-Binder List

structions:	- ((-f	- de la face de la constance d		
The tollowing is the list The user must be activ	e and their account m	iust not be frozen to	be visible in the list bel	ster the selected bi low.	nders from the previous s	step.	
Active Users from you	ur Institution					- 14 - 1	
of 1 item • 0 items selev	ted				Q Search this	s list	
for them solens selec	lieu	1					
		MID	\sim	Username	\sim	Email	`
Full Name	~						
Full Name	`	I			min@hud.gov	⊠ r	hud.gov
Full Name				I	min@hud.gov	⊠ r	hud.gov



Figure **23**-Assign a New Owner

INSTITUTION USERS	MANAGE PE	ERMISSIONS USE	R REPORT	BINDER MANAG	EMENT		
Success! The Binders have successfull	y been transferr	ed. Please verify the follow	ing the list. Click "S	Start Over" to perform	another transfer.		
Binders Transferred							
1 of 1 item		-					
Case Number	~	Status	~	Assigned To	\checkmark	Туре	\sim
\$63		Pending Submission		(Servicing	
							Start Over

Figure 24-Start Over- End Process

6. Getting Help

For further assistance, please contact the FHA Resource Center:

- E-mail <u>answers@hud.gov</u>
- 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.