



Fannie Mae®

Claims Packaging Tool Servicer Support User Manual

Version 1.0

Effective Date : 07/11/2018



Table of Contents

Claims Packaging Tool (CPT) Overview	3
CPT Servicer Use	3
Flow Chart and Timeline	4
Claims Packaging Tool (CPT) Key Terms	5
Claim Type Definitions	5
Package Type	5
Package Status	5
Log in Screen	6
Request My Password/Username	7
Password Reset	7
Request Username	8
Vendor Dashboard	9
Search claim packages	9
Search Filters	10
Search claim packages in the Queue	10
Export to Excel	11
Action	12
Add Users and Notifications	13
Users Tab	13
Active Users	13
Add New User	14
Manage Notifications	15



Claims Packaging Tool (CPT) Overview

The Claims Packaging Tool (CPT) is a web based tool that allows the Fannie Mae analyst to create HUD claims packages related to Reverse Mortgage Expense Reimbursement claims, including creating system generated letters, allowing easy access to upload supporting documents, and a system generated packet to send to the Servicers.

CPT also allows Servicers to acknowledge and download claim packages received from Fannie Mae.

CPT Servicer Use

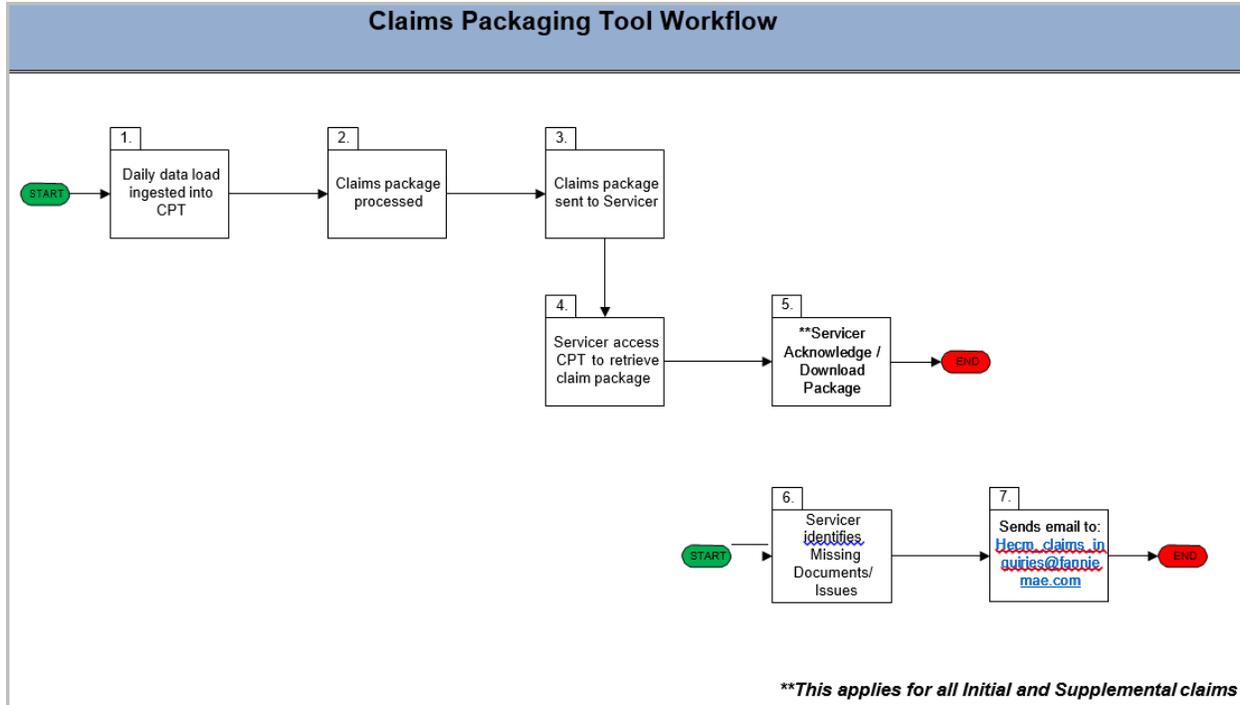
CPT is the single resource for performing the following tasks:

- Viewing claim packages
- Acknowledging claim packages
- Downloading claim packages including invoices



Flow Chart and Timeline

The CPT workflow will be managed on a 5 day timetable. Depending if a claim is a Sales Based Claim or Appraisal Based claim, Fannie Mae will have 5 days from the time the property has sold or when the Marketable Title Period expires to send the claim to the Servicer.





Claims Packaging Tool (CPT) Key Terms

The following key terms will be used in the system:

Key Term	Definition
Claim Type	The type of claim submitted by servicer. Appraisal Based Claim (ABC), Sales Based Claim (SBC), or Supplemental Claim.
Fannie Mae Loan Number	Fannie Mae loan number assigned.
Package Type	Describes the type of package that is going to be reviewed. Initial, Supplemental, and No Supplemental Needed.
Action	An action is required on all packages that are in Issued status. All packages must be acknowledged. Initial packages - allow users to acknowledge and download. Supplemental packages – acknowledge first before downloading.
REO ID	Real Estate Owned (REO) identification assigned to REO properties.
Vendor	Identifies the servicer the package will be submitted to upon completion.

Claim Type Definitions

The category is based on the type of claim being submitted.

- **Appraisal Based Claim (ABC)** – An Appraisal Based Claim (ABC) is filed when a property has not sold within 180 days from the “Marketable Title” date.
- **Sales Based Claim (SBC)** – A Sales Based Claim (SBC) is a claim submitted when the property has sold within 180 days from the “Marketable Title” date or within the Marketable Title Extension period.
- **Supplemental Claim** – A Supplemental Claim is created after the initial package is sent.

Package Type

This category is based on the type of package submitted.

- **Initial Package** – The first claims package created and filed, when the property sells during the marketable title period or after the marketable title period has expired.
- **Supplemental Package** – The claims package created and filed, 180 days after the initial package was filed. The supplemental package includes additional vendor expenses paid during the marketable title period and after the initial package was filed. The servicer has 180 days from the date the initial package was filed to HUD to file a supplemental package.
- **No Supplemental Needed** – The option selected, when no other vendor valid expenses have been paid or not paid during the 180 days of marketable title period.
- **Adhoc Package** – The claims package created and filed for altered claims packages.

Package Status

This category is based on status of the package submitted.

- **Issued** – The package is initially sent to the Servicer awaiting to be acknowledged.
- **Closed** – The package is acknowledged by the Servicer.



Log in Screen

Log into the Claims Packaging Tool (CPT):

1. Click the following link or copy and paste in into the web browser <http://fanniemae.decisionreadysolutions.com> to access the Claims Packaging Tool (CPT).
2. Type the **User Name** and **Password**.
3. Click **Submit**.

The screenshot shows the Fannie Mae login interface. At the top left is the Fannie Mae logo. The main heading is "Mortgage Production & Tracking Technology" with the tagline "SIMPLIFYING YOUR MORTGAGE NEEDS". The background features a graphic of blue human figures standing on a grid of white puzzle pieces. On the left, there is a blue sidebar with links: "About Mortgage Production & Tracking Technology", "Vendor Registration", "Forgot My Password/Username", and "Technical Support". Below the sidebar is a warning message: "WARNING: Unauthorized access to this system is prohibited and may be prosecuted by law. Sharing the contents of this system with any unauthorized party is strictly prohibited. By accessing this system you agree your actions may be monitored." On the right, there is a login form with fields for "User Name:" and "Password:", and a "Submit" button.

NOTE: The user may be asked to change their password after the initial log-in. Please follow the password requirements below to setup the new password.

The screenshot shows a password change requirements screen. At the top, it says "You are required to change your password." Below this, under "Password Requirements:", the following rules are listed: "The password must have a minimum length of 8 characters.", "Password maximum length is 30 characters.", "The password cannot be the same as the userid.", "The password must have at least one alpha, one numeric, and one special character.", "The password cannot match simple words like welcome, account, proper names, dictionary words, database name, or user id". At the bottom, there are two input fields: "New password" and "Re-type new password". Below the fields are two buttons: "Set New Password" and "Cancel".



Request My Password/Username

To request a password reset and/or to retrieve the username, the link is located on the login screen.

1. Click on the **Forgot My Password/Username** to retrieve the data.

Fannie Mae

Your session has been logged out

About Mortgage Production & Tracking Technology

Vendor Registration

Forgot My Password/Username

Technical Support

Mortgage Production & Tracking Technology
SIMPLIFYING YOUR MORTGAGE NEEDS

WARNING: Unauthorized access to this system is prohibited and may be prosecuted by law. Sharing the contents of this system with any unauthorized party is strictly prohibited. By accessing this system you agree your actions may be monitored.

User Name:

Password:

Submit

2. Select the applicable option for the data to be retrieved.

Forgot My Password/Username

Help with Password Username

Password Reset

1. Enter the username, email address.
2. Click **Submit** to reset the password.

Forgot My Password/Username ✖

Help with Password Username

Password Reset

Please enter your system Username and email address. If the Username and email are a valid combination under an active users profile, system shall send an email to the email address on file with a new temporary password.

Username

Email Address

Submit Cancel

NOTE: The system will send an email to the email address on file with a new temporary password.



Request Username

1. Enter the email address on file.
2. Click **Submit** to request username.

Forgot My Password/Username ✖

Help with Password Username

Request Username

Please enter the following information. If all information is valid under an active users profile, system shall send an email to the email address on file that contains the username.

Email Address



Vendor Dashboard

The **Dashboard** screen, the home screen after log-in, allows servicers to view, search, and acknowledge claim packages.

Actions that can be performed in this screen:

- A. Vendor Dashboard (Home Screen)
- B. Users Tab
- C. Search Claim Packages
- D. Logout
- E. Search Filters
- F. Search claim packages in the queue
- G. Export to Excel
- H. Select package(s)
- I. Action (Acknowledge, Download)

Search claim packages

To search claim packages, select an option from the dropdown list:

- REO ID
- FNMA Loan Number
- Servicer Loan Number



Search Filters

Search filters will refine the search of current or previous packages based on the criteria selected.

Vendor Dashboard
Status: All, Issued, Closed
Claim Type: All, ABC, SBC, Supplemental Review
State: All, AK, AL, AR, AZ, CA, CO, CT, DC, --
Package Type: All, Initial Package, Supplemental Package, No Supplemental Needed, AdHoc Package
Acknowledgement Date: From To

Search claim packages in the Queue

This search function will return results from the queue that matches the key words that have been entered.

Select	Comments	Issued Date	Servicer Loan #	FNMA Loan #	Address	Type	Servicer
<input type="checkbox"/>						No Supplemental Needed	Servicer Name: SSID:
<input type="checkbox"/>		01/02/2017				Supplemental Package	Servicer Name: SSID:



Export to Excel

Select all files to be exported and click **Export to Excel**.

Select	Comments	Issued Date	Servicer Loan #	FNMA Loan #	Address	Type	Servicer	Detail	Action
<input checked="" type="checkbox"/>		04/28/2017	64127699	6000233796	8145 S KILDARE AVENUE, CHICAGO, IL 60652	Supplemental Package	Servicer WELLS Name: FARGO BANK, N.A. SSID: 165700074	Acknowledged Date: Acknowledged By: Status: Issued Claim Type: Supplemental Review	<input type="button" value="Acknowledge"/>
<input checked="" type="checkbox"/>		05/01/2017	80322373	6000367022	409 S PLANK ROAD, SANFORD, NC 27330	No Supplemental Needed	Servicer WELLS Name: FARGO BANK, N.A. SSID: 165700074	Acknowledged Date: Acknowledged By: Status: Issued Claim Type: Supplemental	<input type="button" value="Acknowledge"/>

A pop-up will appear. Click "Open" or "Save".

Do you want to open or save CPT-Dashboard-2017-08-08.csv (1.19 MB) from fanniemaueat.decisionreadysolutions.com?

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Comments	Issued Date	Servicer Lc	FNMA Loan #	Address	Type	Servicer N	SSID	Package N	Acknowlec	Acknowlec	Status	Claim Type	Last Download	Attempt
2		4/28/2017				Supplemer						Issued	Supplemental Review		
3		5/1/2017				No Supple						Issued	Supplemental Review		
4		5/1/2017				Supplemer						Issued	Supplemental Review		
5		5/1/2017				Supplemer						Issued	Supplemental Review		
6		5/1/2017				Supplemer						Issued	Supplemental Review		
7		5/1/2017				Supplemer						Issued	Supplemental Review		
8		5/2/2017				Supplemer						Issued	Supplemental Review		
9		5/2/2017				Supplemer						Issued	Supplemental Review		
10		5/2/2017				Supplemer						Issued	Supplemental Review		
11		5/2/2017				Supplemer						Issued	Supplemental Review		
12		5/2/2017				Supplemer						Issued	Supplemental Review		
13		5/2/2017				Supplemer						Issued	Supplemental Review		
14		5/2/2017				Supplemer						Issued	Supplemental Review		
15		5/2/2017				Supplemer						Issued	Supplemental Review		
16		5/2/2017				Supplemer						Issued	Supplemental Review		
17		5/2/2017				Supplemer						Issued	Supplemental Review		
18		5/2/2017				Supplemer						Issued	Supplemental Review		
19		5/2/2017				No Supple						Issued	Supplemental Review		
20		5/3/2017				No Supple						Issued	Supplemental Review		



Action

The Action section shows what action is required on behalf of the servicer. The Servicer may acknowledge the claim package, or acknowledge and download the claim package simultaneously.

1. Click “Acknowledge”
2. Select from “Cancel”, “Yes, I Acknowledge” or “Yes, I Acknowledge and Download”.

The screenshot shows a web application interface with a table of claim packages and an overlaid dialog box. The dialog box, titled "Acknowledgement", contains the text: "Fannie Mae has sent a HUD Claim Package and/or additional Claim Document, please Acknowledge Receipt". Below the text are three buttons: "Cancel", "Yes, I Acknowledge", and "Yes, I Acknowledge and Download". The table below has columns for "Servicer", "Detail", and "Action". The "Action" column for the selected row contains a button labeled "Acknowledge".

Status	Claim Type	State	Package Type	Acknowledgement Date
All	All	All	All	
Issued	ABC	AK	Initial Package	
Closed	SBC	AL	Supplemental Pa	
	Supplemental Review	AR	No Supplemental	
		AZ	AdHoc: Package	
		CA		
		CO		
		CT		
		DC		

Select	Comments	Servicer	Detail	Action
<input checked="" type="checkbox"/>		8145 5 KILDARE AVENUE, CHICAGO, IL 60652	Supplemental Package	Acknowledged Date: Acknowledged By: Status: Issued Supplemental Review

NOTE: This will allow the servicer to either acknowledge the package or acknowledge and download. Once downloaded, the servicer can choose to open or save the package.

The screenshot shows a file download dialog box with the text: "Do you want to open or save CPT-Dashboard-2017-08-08.csv (1.19 MB) from fanniemaeuat.decisionreadysolutions.com?". Below the text are three buttons: "Open", "Save", and "Cancel".

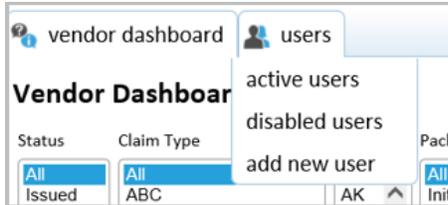


Add Users and Notifications

The Primary User will create as many secondary users beneath their profile as needed, per servicer. The Primary User manages their user profiles and controls who is submitting retrieving claim packages depending on staffing and resource level changes with their organization.

Users Tab

The Users Tab allows the Primary User to view Active and Disabled users, add New Users, edit User information, and manage your notifications.



Active Users

The Active Users screen allows the Primary User to view current active users who are online and take certain actions.

Online	Status	User Name	First Name	Last Name	Title	Role	Vendor	Notification Email	Actions
<input checked="" type="checkbox"/>	Active	[Redacted]	[Redacted]	[Redacted]	Supervisor	CPT: CPT Servicer Primary IRT: RES:	CPT: [Redacted] IRT: RES:	CPT: [Redacted] IRT: RES:	
<input checked="" type="checkbox"/>	Active	[Redacted]	[Redacted]	[Redacted]	Vendor Admin	CPT: CPT Servicer Secondary IRT: RES:	CPT: [Redacted] IRT: RES:	CPT: IRT: RES:	
<input checked="" type="checkbox"/>	Active	[Redacted]	[Redacted]	[Redacted]	Claim Admin	CPT: CPT Servicer Secondary IRT: RES:	CPT: [Redacted] IRT: RES:	CPT: IRT: RES:	

1. **Edit** – Allows the Primary User to edit user information and manage notifications.
2. **History** – Allows the Primary User to view a history of login attempts.

NOTE: There are only two roles; *CPT Servicer Primary* and *CPT Servicer Secondary*.



Add New User

To add a user, move the mouse over the Users tab and select Add New User.



The **Create New User** screen will display,

1. Fill out the required fields, which include the following:

Overall – Servicers should always select External.

CPT Role – This will display available roles (Primary/Secondary).

Name – First and Last name required.

User Name – Currently, there are no specific User Name requirements.

Password – There are no specific password requirements.

Email – Enter the email where notifications should be sent.

Create New User

Note: Fields marked as * are Required Fields.

* Overall: Admin External Other

* CPT Role:

* First Name:

* Last Name:

Title:

* UserName:

* Password:

* Retype Password:

* Email:

Address 1:

Address 2:

City:

State:

Zip:

Phone: Ext:

Login :

2. Click **“Create”**.



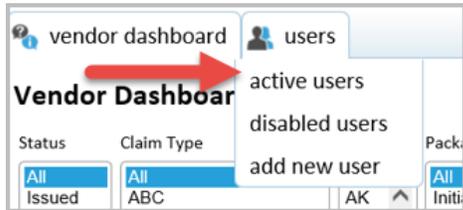
Manage Notifications

All vendors will receive email notifications from a DRS email address when a packages has been submitted by Fannie Mae.

NOTE: All users will be **opted-in** to receive notifications.

To manage the email notifications from the **CPT Servicer Primary** role:

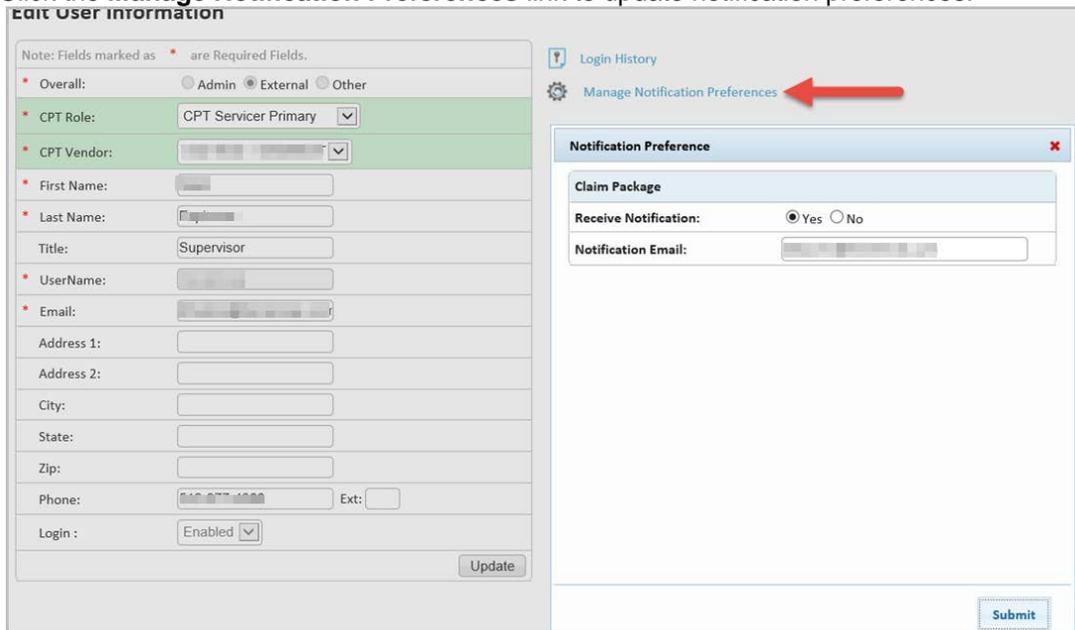
1. Click on **Active Users** in the **Users** tab.



2. Click on the **Edit** icon.



3. Click the **Manage Notification Preferences** link to update notification preferences.





4. Click **Submit** to save the updates.

Notification Preference

Receive Notification: Yes No

Notification Email:

 **Submit**

Users will receive notification emails similar to the one below.

From: techsupport [<mailto:techsupport@decisionreadysolutions.com>]
Sent: Wednesday, July 26, 2017 9:45 AM
To: ADP_MKT_MAE@...
Subject: [EXTERNAL] Fannie Mae Claim Package Complete

 **Fannie Mae**

You have been issued a Fannie Mae HECM Claim Package for loan number (■■■■■■■■■■).

Please log into <http://fanniemaecat.decisionreadysolutions.com/> to acknowledge and download the package.