

Inquiry Response Tool (IRT) Submitter User Manual

July 24, 2025





Table of Contents

Inquiry Response Tool (IRT) Overview	3
IRT Submitter.....	3
IRT Flow Chart and Timeline	3
Logging into the Inquiry Response Tool.....	4
Inquiry Tab	5
Search Inquiries.....	6
View the IRT Submitter User Manual	7
Repository Tab.....	7
Exporting Inquiries to Excel	8
Submit an Inquiry.....	9
Single Inquiry Submission.....	9
Batch Inquiry Submission	10
Receive and Respond to an Inquiry.....	12
Provide Additional Information to Analyst.....	13
Accept or Re-Open the Inquiry	14
View Inquiry Activity	15
Review the Root Cause.....	16
Appendices	17
Appendix A: Inquiry Types.....	17
Appendix B: Inquiry Categories.....	17
Appendix C: Inquiry Statuses	20



Inquiry Response Tool (IRT) Overview

The IRT portal enhances the way the Fannie Mae Expense Reimbursement Team responds to and tracks inquiries related to expense reimbursement claims. Such claims include questions related to expenses denied, curtailed, or pending; unclear guidelines around a claim submission, promissory note, deficiency collections, excess fees and costs and Investor Pre-Approval (IPA) access/issue.

IRT Submitter

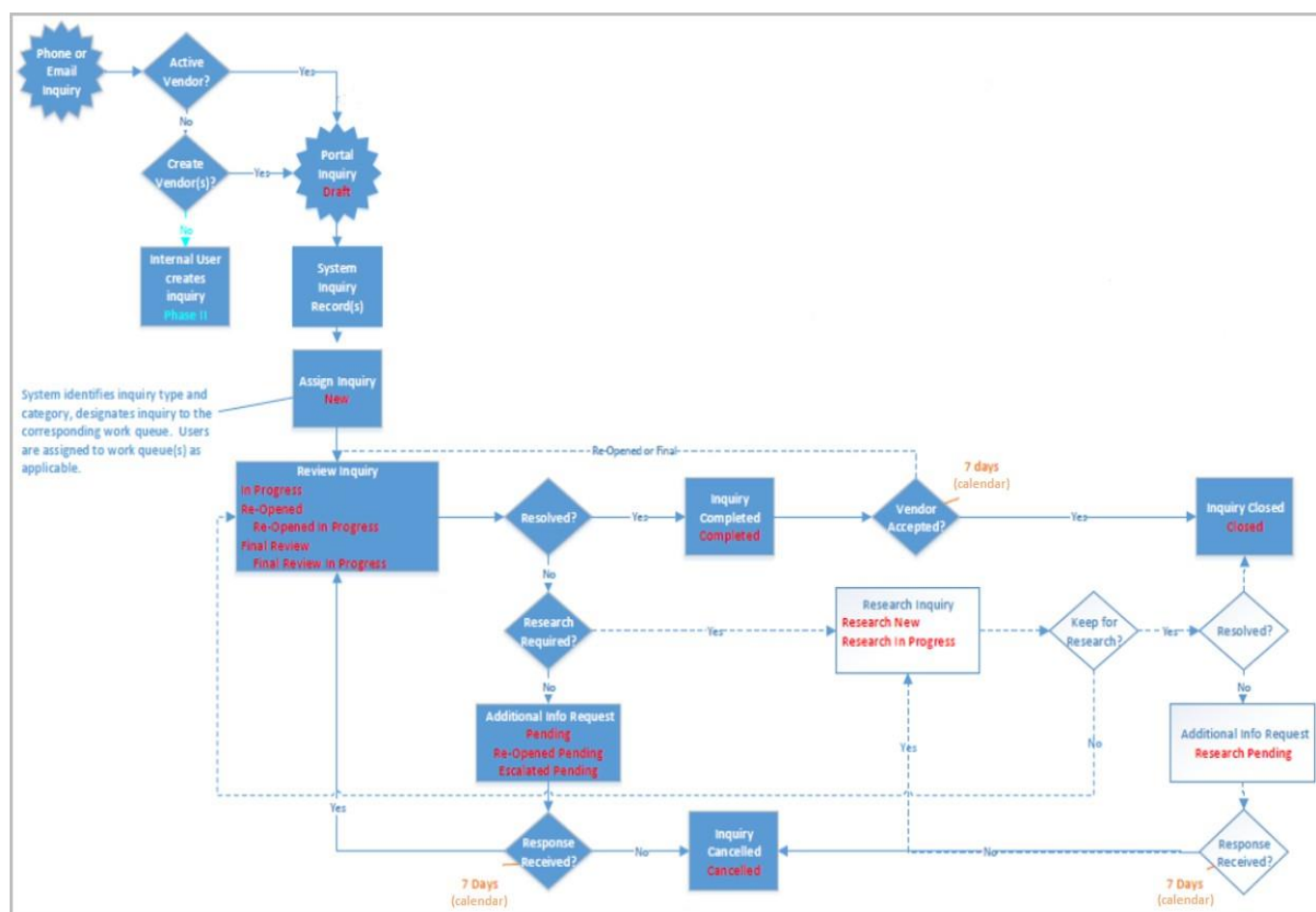
IRT is the single resource for performing the following tasks:

- Submitting inquiries related to claim reimbursement, Promissory Notes, deficiency collections, or excess fees;
- Tracking the progress of an inquiry; and
- Viewing the history of previous inquiries on a loan.

IRT Flow Chart and Timeline

The submitter receives an inquiry response from Fannie Mae and has seven calendar days (“seven days”) to respond. If a response is not received within seven days, the inquiry closes and automatically changes to a “Completed” status.

NOTE: A new inquiry must be submitted if the submitter does not respond within seven days.





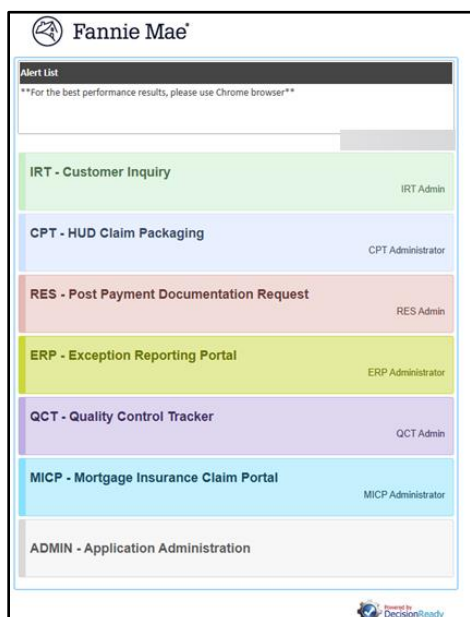
Logging into the Inquiry Response Tool

NOTE: For guidance on granting user access in Technology Manager, refer to the [Granting Access via Technology Manager for DRS Applications job aid](#), as applicable.

1. Access the [Inquiry Response Tool \(IRT\)](#).
2. Click **Login with fmsso**.

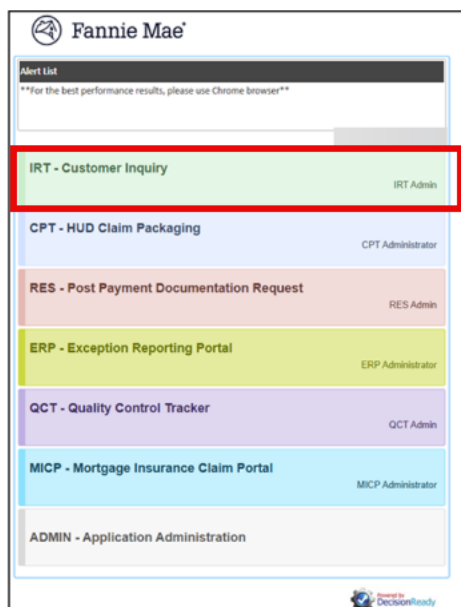


NOTE: Upon authentication via SSO, the user is automatically redirected to the DRS listings screen. This screen displays only the DRS applications that the user is authorized to access.

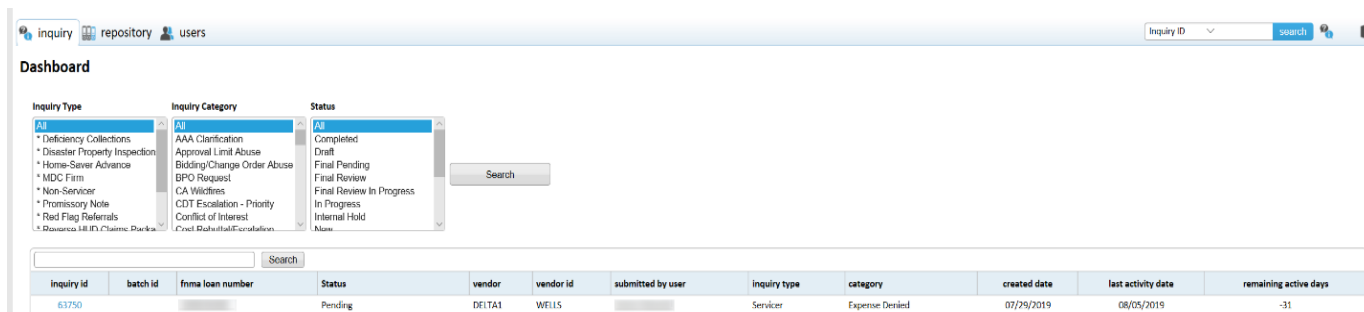




3. Click **IRT – Customer Inquiry** from the list of applications.



The **Dashboard** displays after logging in and allows submitters to view, search, submit, and respond to inquiries.

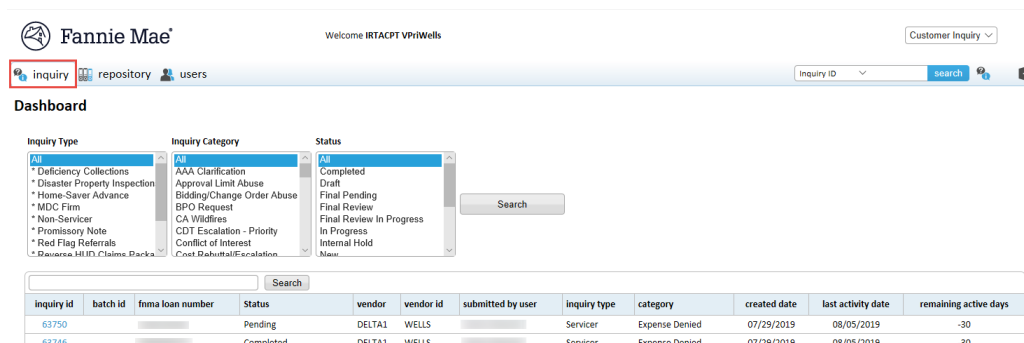


4. Proceed to the applicable section:

- [Inquiry Tab](#)
- [Repository Tab](#)
- [Users Tab](#)
- [Submit an Inquiry](#)

Inquiry Tab

1. Click on the **Inquiry** tab.



This screen allows users to perform the following:



- [Search Inquiries](#)
- [View the IRT Submitter User Manual](#)

Search Inquiries

1. Select the applicable search criteria option from the drop-down menu:

- Inquiry ID
- REO ID
- Loan Number

inquiry repository users

Dashboard

Inquiry ID
REO ID
Loan Number

63750 search

2. Enter the loan or ID number in the field to the right of the drop-down menu.

Inquiry ID
REO ID
Loan Number

63750 search

3. Click **Search** to display applicable inquiries.

NOTE: The “Remaining Active Days” column indicates the number of days that remain for the submitter to Accept or Re-Open the inquiry. If no action is taken, the inquiry status changes to “Closed” or “Cancelled”.

inquiry repository users

Dashboard

Inquiry Type Inquiry Category Status

Search

inquiry id	batch id	fma loan number	Status	vendor	vendor id	submitted by user	inquiry type	category	created date	last activity date	remaining active days
63750			Pending	DELTA1	WELLS		Service	Expense Denied	07/29/2019	08/05/2019	-31

NOTE: Users can also search for inquiries using the following:

- **Search Filters** - These filters allow users to narrow the search of current or previous inquiries based on selected criteria.

Fannie Mae

Welcome IRTACPT VPIWells

Customer Inquiry

inquiry repository users

Dashboard

Inquiry Type Inquiry Category Status

Search

inquiry id	batch id	fma loan number	Status	vendor	vendor id	submitted by user	inquiry type	category	created date	last activity date	remaining active days
63750			Pending	DELTA1	WELLS		Service	Expense Denied	07/29/2019	08/05/2019	-30
63746			Completed	DELTA1	WELLS		Service	Expense Denied	07/29/2019	08/05/2019	-30



- **Search Inquiries in queue** – An additional search function that returns results from the user's queue based on selected criteria.

Fannie Mae® Welcome IRTACT VP/Wells

Customer Inquiry ▾

inquiry repository users

Inquiry ID: 1234567891 search

REC ID: Loan Number

Dashboard

Inquiry Type

- * Deficiency Collections
- * Disaster Property Inspection
- * Home-Saver Advance
- * MDC Firm
- * Non-Servicer
- * Promissory Note
- * Red Flag Referrals
- * Reverse HUD Claims/Disputes

Inquiry Category

- AAA Clarification
- Approval Limit Abuse
- Bidding/Change Order Abuse
- BPO Request
- CA Wildfires
- CDT Escalation - Priority
- Conflict of Interest
- Cost Disputal/Escalation

Status

- Completed
- Draft
- Final Pending
- Final Review
- Final Review In Progress
- In Progress
- Internal Hold
- None

Search

inquiry id	batch id	frma loan number	Status	vendor	vendor id	submitted by user	inquiry type	category	created date	last activity date	remaining active days
63750			Pending	DELTA1	WELLS		Servicer	Expense Denied	07/29/2019	08/05/2019	-30
63746			Completed	DELTA1	WELLS		Servicer	Expense Denied	07/29/2019	08/05/2019	-30

View the IRT Submitter User Manual

1. Click the  icon.

Fannie Mae® Welcome IRTACT VP/Wells

Customer Inquiry ▾

inquiry repository users

Inquiry ID: 1234567891 search

REC ID: Loan Number

Dashboard

Inquiry Type

- * Deficiency Collections
- * Disaster Property Inspection
- * Home-Saver Advance
- * MDC Firm
- * Non-Servicer
- * Promissory Note
- * Red Flag Referrals
- * Reverse HUD Claims/Disputes

Inquiry Category

- AAA Clarification
- Approval Limit Abuse
- Bidding/Change Order Abuse
- BPO Request
- CA Wildfires
- CDT Escalation - Priority
- Conflict of Interest
- Cost Disputal/Escalation

Status

- Completed
- Draft
- Final Pending
- Final Review
- Final Review In Progress
- In Progress
- Internal Hold
- None

Search

2. Click on the **Resources** tab and then click on the **IRT – Submitter User Manual** link to open the manual.

Help

resources terms aaa matrix

Resources

IRT User Manual

Repository Tab

1. Click on the **Repository** tab.

Fannie Mae® Welcome IRTACT VP/Wells

Customer Inquiry ▾

inquiry repository users

Inquiry ID: search

Repository

Select Search Criteria(Optional)

Received Date: to Inquiry Type: -Select- Status: -Select-

Closed Date: to Inquiry Category: -Select-

Last Activity Date: to Vendor Type: -Select-

Reset Filter Export to Excel

BKI Category

- Attorney Fees
- Court Costs
- Deductible
- Default Services Fees
- Evidon Costs
- Filing Costs

Root Cause Detail

- O - Question - Policy guide/status
- O - System Issue
- P - Expense - not paid to tolerance
- P - Ignored - guidelines/communication
- P - Ignored - notes/comments
- S - Claim - data submission

Assigned User

Search:

inquiry id	batch id	frma loan number	claim id	status	vendor	vendor id	submitted by user	inquiry type	category	vendor type	bki category	received date	closed date	last activity date	remaining active days
------------	----------	------------------	----------	--------	--------	-----------	-------------------	--------------	----------	-------------	--------------	---------------	-------------	--------------------	-----------------------

2. Enter or select search criteria in any of the following fields and click **Filter**.



- Received Date (from and to)
- Closed Date (from and to)
- Last Activity Date
- Inquiry Type

NOTE: Refer to [Appendix A: Inquiry Types](#).

- Inquiry Category

NOTE: Refer to [Appendix B: Inquiry Categories](#).

- Vendor Type
- Status

NOTE: Refer to [Appendix C: Inquiry Statuses](#).

- BKI Category
- Root Cause Detail
- Assigned User

Repository

Select Search Criteria(Optional)

Received Date: 06/01/2017 to 08/05/2017 Inquiry Type: -Select- Status: -Select- BKI Category: Attorney Fees, Court Costs, Deductible, Default Services Fees, Eviction Costs, Filing Costs Root Cause Detail: O - Question - Policy guide/status, O - System Issue, P - Expense - not paid to tolerance, P - Ignored - guidelines/communication, P - Ignored - photos/comments, S - Claim - late submission Assigned User: [blurred]

Reset Filter Export to Excel

The search results display.

Reset Filter Export to Excel

inquiry id	batch id	fnma loan number	claim id	status	vendor	vendor id	submitted by user	inquiry type	category	vendor type	bki category	created date	closed date	last activity date	remaining active days
28921			P110000156034	Closed	DELTA1	WELLS		Servicer	PFM - Prod Framework Mgmt	SERVICER		07/21/2017	09/26/2017	09/26/2017	
28796			CLM00027648	Closed	DELTA1	WELLS		Servicer	PFM - Prod Framework Mgmt	SERVICER		07/19/2017	09/26/2017	09/26/2017	

NOTE: Refer to the [Exporting Inquiries to Excel](#) section for steps on how to export a list of inquiries.

Exporting Inquiries to Excel

Perform the following steps to export inquiries of the selected search criteria:

- Click **Export to Excel**.

Repository

Select Search Criteria(Optional)

Received Date: to Inquiry Type: -Select- Status: -Select- BKI Category: Attorney Fees, Court Costs, Deductible, Default Services Fees, Eviction Costs, Filing Costs Root Cause Detail: O - Question - Policy guide/status, O - System Issue, P - Expense - not paid to tolerance, P - Ignored - guidelines/communication, P - Ignored - photos/comments, S - Claim - late submission Assigned User: [blurred]

Reset Filter Export to Excel

- The following pop-up message displays. Click **Open**, **Save** or **Cancel**, as applicable.



Do you want to open or save IRT-Repository-2017-01-31.xlsx (3.72 KB) from fanniemaeuat.decisionreadysolutions.com?

Open

Save

Cancel

×

NOTE: An Excel spreadsheet opens in .CSV format and displays the results.

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do																	
PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing																	
A1 Inquiry ID																	
Inquiry ID	Batch ID	FNMA Loan Number	Claim ID	Status	Vendor	Vendor ID	Submitted By User	Inquiry Type	Category	Vendor Type	Root Cause	Root Cause Detail	BKI Category	Received Date	Closed Date	Last Worked By	Last Activity Date
26758			54610546	Closed	SAFEGUARD TR138705X			Non-Servicer	Expense Pe FIELD SERVICES Submitted Inc					6/1/2017 3:36:41	6/12/2017 12:05:00		6/12/2017 12:05:00
26759			54604293	Closed	SAFEGUARD TR138705X			Non-Servicer	Expense Pe FIELD SERVICES Submitted Inc					6/1/2017 3:40:57	6/12/2017 12:05:00		6/12/2017 12:05:00

Submit an Inquiry

The vendor inquiry workstation allows users to submit a [single](#) or [batch](#) set of inquiries.

Single Inquiry Submission

Perform the following steps to submit a single inquiry:

- Click on the **Inquiry** tab and select **Create New Inquiry** from the drop-down menu.

inquiry repository users

create new inquiry

create inquiry batch

- Enter all applicable information related to the inquiry, including the required fields denoted with an asterisk (*). The **Create New Inquiry** screen varies based on the **Inquiry Type** associated with the user's profile.

NOTE: Refer to [Appendix A: Inquiry Types](#) and [Appendix B: Inquiry Categories](#).



Create New Inquiry

Inquiry Details

* Inquiry Type: -Select- * Vendor Type: -Select-
SSID: Vendor ID:

Inquiry Details

* Inquiry Category: -Select-
* FNMA Loan Number: REG ID: Claim ID: Claim Submitted Date: Claim Amount: Claim Paid Date: Related Inquiries (list one more inquiry ID's separated by commas):

* Inquiry Description:

Supporting Documents (provide as applicable)

Document Name	Upload Date	Size	Action
No documents uploaded			

Document **Description** **Select File** **Browse...**

Document **Description** **Select File** **Browse...**

Document **Description** **Select File** **Browse...**

Document **Description** **Select File** **Browse...**

Document **Description** **Select File** **Browse...**

Document **Description** **Select File** **Browse...**

Line Items Details (provide as applicable)

571 Line Item	Requested Amount	Amount Paid	Comments	Response

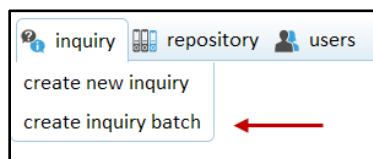
Save Submit

Batch Inquiry Submission

Perform the steps in this section to submit a batch inquiry. Inquiries uploaded in a batch are addressed as individual inquiries after being uploaded in the tool. Each batch may only contain one **Inquiry Category** per upload. Multiple batches may be necessary if submitting inquiries that require more than one **Inquiry Category**.

NOTE: For example, if there are 100 inquiries and 50 of them are Expense Curtailed and 50 are Expense Denied, the user submits two batches, one for each **Inquiry Category**.

1. Click on the **Inquiry** tab and select **Create Inquiry Batch**.



The **Create Inquiry Batch** screen displays.

Create Inquiry Batch

A batch of inquiries can be submitted using the attached template.

[Download template](#)

All fields noted as required (*) must be included.

The template upload must be in CSV format.

Inquiries submitted via the batch process will receive individual response upon review by Fannie Mae.

* Inquiry Type: -Select-
Vendor Type: -Select-
* Inquiry Category: -Select-
* Upload file with inquiries: Browse...
Upload Batch File

2. Click on the **Download Template** link.



Create Inquiry Batch

A batch of inquiries can be submitted using the attached template.

[Download template](#)

All fields noted as required (*) must be included.
The template upload must be in CSV format.
Inquiries submitted via the batch process will receive individual response upon review by Fannie Mae.

* Inquiry Type

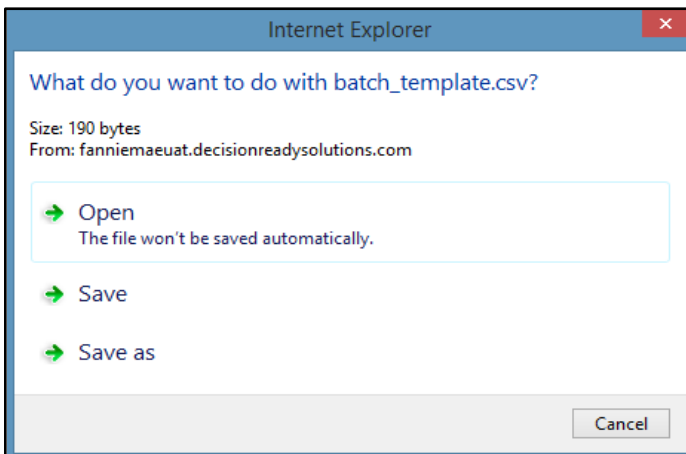
Vendor Type

* Inquiry Category

* Upload file with inquiries

An Internet Explorer pop-up window displays.

3. Click **Open** or **Save**.



The spreadsheet opens in Microsoft Excel.

4. Enter all required information and any additional information that supports the claim.
5. Save the file in .csv format.

1	SSID	Vendor ID	FNMA Loan Number (Required Field)	REO ID	Claim ID (Required Field)	Claim Submitted Date	Claim Amount	Claim Paid Date	Inquiry Description (Required Field)
2									
3									
4									
5									
6									

6. Click **Browse** and navigate to the file saved in the previous step.



Create Inquiry Batch

A batch of inquiries can be submitted using the attached template.

[Download template](#)

All fields noted as required (*) must be included.

The template upload must be in CSV format.

Inquiries submitted via the batch process will receive individual response upon review by Fannie Mae.

* Inquiry Type	Servicer	▼
Vendor Type	SERVICER	▼
* Inquiry Category	Expense Curtailed	▼
* Upload file with inquiries	C:\Users\b8urpc\Desktop\Test Batch.csv	Browse...

7. Click **Upload Batch File**.

Create Inquiry Batch

A batch of inquiries can be submitted using the attached template.

[Download template](#)

All fields noted as required (*) must be included.

The template upload must be in CSV format.

Inquiries submitted via the batch process will receive individual response upon review by Fannie Mae.

* Inquiry Type	Servicer	▼
Vendor Type	SERVICER	▼
* Inquiry Category	Expense Curtailed	▼
* Upload file with inquiries	C:\Users\b8urpc\Desktop\Test Batch.csv	Browse...

Upload Batch File ←

A pop-up message displays that includes the batch number and indicates if the upload was successful. Click on the **Inquiry** tab to view all inquiries.

Upload Batch File

Successfully Added 1 Inquires to Batch 52 ←

Receive and Respond to an Inquiry

The submitter receives a response from the Analyst and performs one of the following within seven business days:

- [Provide additional information to the Analyst](#)
- [Accept or reopen the inquiry](#)



Provide Additional Information to Analyst

If the Analyst requests additional information, the inquiry displays on the submitter's dashboard in a **Pending** status.

1. Click on the **Inquiry ID**.

Dashboard

Inquiry Type: **All** Non-Servicer
Inquiry Category: **All** Expense Curtailed Expense Denied Expense Pending System Issue Unclear Guidelines
Status: **All** Completed Draft Final Pending Final Review Final Review In Progress In Progress New Pending

Search

Search

inquiry id	batch id	fnma loan number	Status	vendor	inquiry type	category	created date	last activity date	remaining active days
307			Pending			Expense Curtailed	04/29/2015	05/18/2015	7

2. Review the External comment in the **Inquiry Comment History** to determine what the Analyst is requesting.
3. Enter the additional information requested by the Analyst in the **Vendor Comment** section.

NOTE: The current character limit is set at 1000.

571 Line Item	Requested Amount	Amount Paid	Comment	Response	Actions
No Claim Line Items!					
Line Items Details (provide as applicable) Add Additional Line					
571 Line Item	Requested Amount	Amount Paid	Comments	Response	
Vendor Comment					
Enter additional information requested.					
Save Comment					

4. Click **Save Comment**.

NOTE: The comment does not save if the user does not click **Save Comment** prior to sending the inquiry back to the Analyst.

571 Line Item	Requested Amount	Amount Paid	Comment	Response	Actions
No Claim Line Items!					
Line Items Details (provide as applicable) Add Additional Line					
571 Line Item	Requested Amount	Amount Paid	Comments	Response	
Vendor Comment					
Enter additional information requested.					
Save Comment					

5. Scroll to the **Supporting Documents** section and upload additional documentation, if applicable.

Supporting Documents (provide as applicable)

Document Name	Upload Date	Size	Action
Backup	07/29/2019	53 KB	Download

Document Description: [Select File](#) [Browse...](#) [Upload](#)

6. Click on one of the following to update the inquiry status:

- **Save** – Click this button to save the inquiry and keep it listed on the dashboard.
- **Submit** – Click this button to send the inquiry back to the Analyst.



- **Cancel** – Click this button to cancel the inquiry.

NOTE: No further action can be taken once **Cancel** is clicked.

Inquiry Comment History

Type	Date	User	Comment
External	8/5/2019 7:17:04 AM		Hello [redacted], Thank you for reaching out. I have verified through the attached tax bill, the county taxes in amount of \$145.17 are supported by service dates 4/1/2018-6/30/2018. A claim can be resubmitted for the county taxes in amount of \$145.17 with service dates 4/1/2018-6/30/2018. Please respond to this inquiry and advise when Wells Fargo re-submits the claim, so that I can personally ensure timely processing and close this issue. I appreciate you and our partnership, if you have any questions or need further clarification, please reach me at [redacted] or [redacted]@FannieMae.com.

Root Cause : Submitted Incorrectly

Root Cause Detail : S - Date, Service - not provided/incorrect

BKI Category : Taxes

Save

Submit

Cancel

Accept or Re-Open the Inquiry

Perform the following steps to accept or re-open a **Completed** inquiry:

1. Click on the **Inquiry ID**.

Dashboard

Inquiry Type: All, Non-Servicer
Inquiry Category: Expense Curtailed, Expense Denied, Expense Pending, System Issue, Unclear Guidelines
Status: All, Completed, Draft, Final Pending, Final Review, Final Review In Progress, In Progress, New, Pending

Search

inquiry id	batch id	fmma loan number	Status	vendor	inquiry type	category	created date	last activity date	remaining active days
307			Completed		Non-Servicer	Expense Curtailed	04/29/2015	05/18/2015	7

2. Review the “Completed” inquiry.
3. Is any further action required?
 - **Yes** – Proceed to the next step.
 - **No** – Click **Accept** and then **Submit** to close the case.

Root Cause : Duplicate Request

Root Cause Detail : S - Expense - not reimbursable

BKI Category :

Accept

Re-Open

4. Click **Request Call**, as applicable, to enter a message and request a call back. The phone number pre-populates based on what is entered in the user profile, but it can be updated, if needed. Click **Submit**

Line Items Details (provide as applicable)

571 Line Item	Requested Amount	Amount Paid	Comments	Response

Request Call

Vendor Comment

Save Comment



Request Call

Request Call info (IRTACPT VSecWells)

Phone Number: 214-242-1234 100

Phone Comment

Please call me to discuss.

Submit

5. Enter comments for the Analyst, if needed, and then click **Save Comment**. Do not click **Re-Open** until all comments are entered.

Line Items Details (provide as applicable)

571 Line Item	Requested Amount	Amount Paid	Comments	Response

Request Call

Vendor Comment

Save Comment

Inquiry Comment History

Type	Date	User	Comment
External	8/1/2019 11:53:16 AM	IRTACPT Analyst	Thank you for providing the supporting documentation. We will use the documents to complete our OC review if the documentation was submitted within the document request deadline date and/or extension approval date.

Root Cause : PFM - 1 or More Expenses Not Supported by Docs (PFM Only)

Root Cause Detail :

BKI Category :

Accept Re-Open

6. Click **Re-Open** to send the inquiry back to the Analyst.

Root Cause : Duplicate Request

Root Cause Detail : S - Expense - not reimbursable

BKI Category :

Accept Re-Open

7. Click **Submit** to decision the **Pending** inquiry.

Save Submit Cancel

View Inquiry Activity

Click on the **Inquiry Activity** tab, located to the right of the **Inquiry Detail** tab, to view an audit trail of inquiry case assignments and statuses by **Username**, **User Role**, **Date of Change**, and the **Description of Change Made**.

inquiry detail inquiry activity

Inquiry Activity

Username	User Role	Date of Change	Description of Change Made
	IRT Admin	09/27/2018 03:48:18	Re-Opened In Progress to Closed
	IRT Lead	05/07/2018 06:10:43	Re-Opened to Re-Opened In Progress
	IRT Vendor Secondary	07/12/2017 05:43:16	Completed to Re-Opened
	IRT Analyst	07/06/2017 01:38:42	In Progress to Completed
	IRT Analyst	07/06/2017 10:11:39	New to In Progress
	IRT Vendor Secondary	06/30/2017 11:29:52	New



Review the Root Cause

Submitters may view the **Root Cause** on the **Inquiry Details** screen after the inquiry has been decisioned. The **Root Cause** field displays the reason the inquiry was originally submitted based on Fannie Mae’s assessment.

Inquiry Comment History			
Type	Date	User	Comment
External	2/20/2018 8:16:23 AM	Fannie Mae Analyst	Hello Daniel, Your expense submission has been cancelled/rejected per your request. Thank you.
Root Cause: Submitted Incorrectly 			

In addition to the **Inquiry Details Screen**, users can view the **Root Cause** data within the Excel spreadsheet generated from the **Repository Screen**.

NOTE: Refer to the [Exporting Inquiries to Excel](#) section for steps on how to export a list of inquiries.



Appendices

Appendix A: Inquiry Types

The following inquiry types indicate the internal group that is receiving the inquiry based on their vendor/servicer profile:

Category	Description
Deficiency Collections	The collection pursuit of strategic defaulters for deficiency balances after foreclosure
Disaster Property Inspections	Used for managing property inspections related to disasters
HomeSaver Advance	The collection pursuit of borrowers who signed a HomeSaver Advance Note as part of a workout solution to avoid foreclosure
MDC Firm	This is for inquiries related to excess fees and costs
Non-Servicer	These inquiries are primarily for REO vendors
Promissory Note	The collection pursuit of borrowers who signed a Promissory Note as part of a workout solution during liquidation (DIL/SS) of the property
Reverse HUD Claims Packaging	Reverse mortgage inquiries for REO vendors
Reverse Non-Servicer	Reverse mortgage inquiries for REO vendors
Reverse Servicer	Reverse mortgage inquiries
Servicer	Inquiries that are servicer related

Appendix B: Inquiry Categories

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

Category	Description
AAA Clarification (MDC Firm Use Only)	This option is requesting additional information or clarification on the AAA Matrix.
BPO Request (Deficiency Collections Use Only)	The request for PDF copies of BPO/appraisals.
CA Wildfires	Disaster inspection specific to wildfires in California.
CDT Escalation	Internal escalation submitted by the Customer Delivery Teams (CDTs).
CDT Escalation - Priority	Internal escalation submitted by the CDTs and reviewed by a manager.
Cost Rebuttal/Escalation (MDC Firm Use Only)	The cost was denied, curtailed, or the user is requesting an additional Fannie Mae review.
Data Request (Promissory Note/Deficiency Collections/Home-Saver Advance Use Only)	General request for data only/adhoc.
Deboarding Issue (Home-Saver Advance Use Only)	Items related specifically to the mass closing of accounts within the H.S.A portfolio



Document Executions (Assignments) (Deficiency Collections Use Only)	The request from a vendor to have a document executed by Fannie Mae and/or Servicer.
Document Request (Reverse HUD Claims Packaging Use Only)	Request for any additional documents relative to the claim, excluding eviction chronology and marketable title letter.
Eviction Chronology (Reverse HUD Claims Packaging Use Only)	Detailed timeline of events that took place during the eviction process from the eviction firm.
Excess Fee	This category should be used only for inquiries specific to the excess attorney fees process.
Expense Curtailed	The claim was not paid in its entirety. Only part of the claim was paid.
Expense Denied	The entire claim was denied.
Expense Pending	The claim has been submitted, but not yet been paid, rejected/denied or curtailed.
Fee Rebuttal/Escalation (MDC Firm Use Only)	The fee was denied, curtailed, or the user is requesting an additional Fannie Mae review.
General Inquiry (MDC Firm Use Only)	This option is for general IPA inquiries.
General Inquiry (Promissory Note/Deficiency Collections/Home-Saver Advance Use Only)	General inquiry (not specific to just data)
HUD Claim Return (Reverse HUD Claims Packaging Use Only)	Use if a claim is returned or rejected.
Incomplete Boarding Data (Deficiency Collections Use Only)	Issues and/or requests related specifically to the Vendor Assign List report that is generated by Fannie Mae and sent to collection vendor.
IPA Access/Issue (MDC Firm Use Only)	The system used to submit IPA requests is not working properly or a user is having trouble accessing the system.
IRS Form 1099C (Deficiency Collections/Home-Saver Advance Use Only)	Reporting and/or issues related specifically to IRS form 1099c.
Legal (Promissory Note/Deficiency Collections Use Only)	Legal defense issues and/or approval to seek legal pursuit against borrower(s).
Manual Claim Request (Internal Use Only)	This is for claim reimbursement expense that cannot be processed via traditional claim processing channels (request requires business pre-approval).
Marketable Title Incorrect/Issue (Reverse HUD Claims Packaging Use Only)	To be used if it is determined that dates relative to the marketable dates submitted are incorrect.
MI Data (Promissory Note/Deficiency Collections Use Only)	Issues concerning promissory notes/deficiency collections, and MI companies.



Missing Initial/Missing Supplemental (Reverse HUD Claims Packaging Use Only)	To be used if there is a claim that is due, but it has not yet been received.
Note Request Validation (Promissory Note Use Only)	Missing Promissory note/research requested.
NPI Request (SSN) (Promissory Note/Deficiency Collections/Home-Saver Advance Use Only)	Missing SSN/requesting non-public information for collection purposes.
Other (Reverse HUD Claims Packaging Use Only)	Use when inquiries are not covered by other inquiry categories.
PFM – Prod Framework Mgmt.	Used as directed for claims submitted through the PFM Claim Type only.
PFM – QC Document Request	Used as directed for claims submitted through the PFM Claim Type only.
QAR Request/Follow-up (Deficiency Collections Use Only)	Any correspondence that is specifically related to the QC process known as QAR, Quality Assurance Review.
Referral Request (Deficiency Collections Use Only)	The request from collection vendor to refer an account for collection pursuit. Reason for the request is necessary.
Reporting (Promissory Note Use Only)	Items related to remittance or collection activity reporting as well as missing prom notes report.
Servicer Contacts/Data/Document Requests (Deficiency Collections Use Only)	The request for information from servicer(s) where Fannie Mae's involvement is required.
Settlement Approval (Promissory Note/Deficiency Collections/Home-Saver Advance Use Only)	The request for a settlement which is below collection vendor's threshold.
Settlement Campaign Approval (Promissory Note/Deficiency Collections/Home-Saver Advance Use Only) Use Only)	Approval for collection campaigns that cover a large bandwidth of accounts at reduced settlement amounts.
System Issue	The system used to submit claims is causing claims to be rejected/denied.
Unclear Guidelines	The current expense reimbursement submission guidelines or supporting job aids are not clear on how to submit claims.
Red Flag Referrals (Internal Use Only)	Use to escalate red flag related items.
Reporting (Deficiency Collections Use Only)	Items related to remittance, DVD, Vendor Assign List, or other misc. reports generated by collection vendor or Fannie Mae.
Reporting (Home-Saver Advance Use Only)	Items related to remittance, collection activity, Dashboards, or other misc. reports generated by collection vendor or Fannie Mae.



Appendix C: Inquiry Statuses

Status	Definition
Draft	Submitter can save work in progress before they submit the inquiry.
New	System assigned, but not yet reviewed.
In Progress	Fannie Mae review started.
Pending	IRT submission returned to submitter for additional information.
Cancelled	IRT submission returned to submitter, but additional information was not received within 7 days.
Completed	Fannie Mae review completed and sent to submitter for review.
Re-Opened	The submitter Re-Opened the Completed inquiry.
Re-Opened In Progress	Fannie Mae review of the Re-Opened inquiry is in progress.
Re-Opened Pending	The inquiry was sent to the submitter, pending additional information.
Final Review	The submitter Re-Opened the Completed inquiry for a second time. This will be the last opportunity for a rebuttal.
Final Review In Progress	Fannie Mae final review of the Re-Opened inquiry is in progress.
Final Pending	The inquiry was sent to the submitter, pending additional information. This will be in a Final Review stage.
Research New	The inquiry was assigned to the Research Analyst, not yet reviewed.
Research In Progress	Research review started.
Research Pending	IRT submission returned to submitter by the research team for additional information.
Closed	48-hour hold of the Completed inquiry expires or Submitter accepts response from the Research Analyst.