



Implementation Readiness Tracker

Job Aid

Version 1.3 – August 26, 2026



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Implementation Readiness Tracker

At-a-Glance

The **Implementation Readiness Tracker** is used to report your organization's readiness for applicable servicing changes and help Fannie Mae monitor overall implementation progress.

What You Need to Know

- **Verify your profile** at each login, including company and Technology Service Provider information.
- **Servicers are responsible for reporting their own readiness, even when using a Technology Service Provider.**
- **If no servicer development is required**, answer readiness questions based on your organization's ability to report directly through the user interface.
- **Keep readiness status current** for each assigned phase: Not Started, On Track, Off Track, or Completed. **Off Track requires commentary.**
- **Complete required milestones and questions** before confirming a phase as complete. **Once Completion is confirmed, the phase is locked and no further updates can be made.**
- **Monitor target dates and phase flags.** At-Risk and Past-Due flags indicate that attention or action may be needed.

Remember

Report regularly, keep information current, and address issues early to support implementation readiness.

Need help or need to update a Reporting POC? Contact the [Future of Servicing](#) mailbox.

Overview

The Implementation Readiness Tracker is a centralized tool for servicers and Technology Service Providers to report readiness for servicing changes outlined in [Lender Letter LL-2026-05](#). Steps for completing the Tracker screens are listed in the left side panel of each page. This Job Aid will provide additional guidance. [Troubleshooting tips](#) can be found at the end of this document. Other resources (e.g., Readiness Checklists for servicers and Technology Service Providers) are available on the [Servicing Platform webpage](#).

Get Started

If your company has already listed you as a Reporting Point of Contact (POC), then you've been registered and granted access. When you receive the email titled "You are registered for the tracker," log in with your work email address. Organizations may assign different users to different releases, such as Escrow Reporting, Delinquency Reporting, and Loan Data Change. Contact [Future of Servicing](#)

- Register additional Reporting POCs, or
- Update release assignments.

NOTE: Only those servicers and TSPs that have been identified by Fannie Mae are required to report their status.

Log In

1. Open the [Implementation Readiness Tracker](#) link and click **Let's Begin**.
2. Follow the instructions on the left side of the screen to log in.

Profile Page

The Profile Page is divided into three sections: Contact and Company information, Technology Service Provider Information (for servicers only) and Servicing Changes Release(s).

1. At each login, verify that contact and company information is correct. If updates are needed, contact Fannie Mae via the [Future of Servicing](#).
2. Select a Technology Service Provider and click **Save Changes**.
3. In the Servicing Changes Release box, assigned releases are listed on the left. Click **Continue to Status Reporting**.

Follow the instructions on the left-hand side of the screen for additional guidance.

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Implementation Readiness Tracker

Profile Page

This page shows your contact and company information and allows you to manage the Servicing Changes Releases (e.g., Escrow Reporting) associated with your profile for reporting your organization's readiness status.

How Releases Work:
To help you understand how releases and reporting will function across your organization, here are a few key points:

- Readiness reporting is tracked at the company level.**
 - All updates roll up to a shared organizational status.
- Multiple Company Reporting Contacts may work on the same release.**
 - Any company reporting POCs assigned to a release can submit updates.
- The most recent submission overwrites earlier entries.**
 - If several people update the same release, only the latest status is saved.
- You may report readiness status for multiple releases.**

Need help?
Please contact future_of_servicing@fanniemae.com

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Contact Information

First Name	Last Name	Email
Susan	Test	susan_test@gmail.com

Company Information

Company Name	Type	Servicer Number
TESTING COMPANY	Servicer	123456987

Company Reporting POC(s)

2

Technology Service Provider Information

This information is being collected to identify reporting platforms and to track overall readiness of our industry partners.

Select your Technology Service Provider from the drop-down list and click Save Changes.

- If the provider is not listed, select **Other** and enter name.

Technology Service Provider *

--Select--

SAVE CHANGES

3

SERVICING CHANGES RELEASES

Releases currently assigned to your profile.

Releases

- Escrow Reporting
- Delinquency Reporting

CONTINUE TO STATUS REPORTING

Status Reporting

The Status Reporting page is used to submit status updates for each readiness phase of your assigned releases. Below is a summary of the page's key elements and next steps. Follow the steps in the left-hand panel to complete the status updates.

Field	Description
1	Left Panel
2	Return to Profile
3	Servicing Changes Release
4	Readiness Phase Target Timeline & Phases
5	Company Information
6	Milestones
7	Status Details
8	Questions

Status	Definition
--------	------------

Not Started	Phase Milestones have not been started.
On Track	Phase Milestones have been started are on track to be completed by the Targeted Completion Date .
Off Track	Phase milestones will not be finished by the Targeted Completion Date . Commentary is required.
Completed	All milestones for this phase are completed and are confirmed on behalf of your organization.

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Implementation Readiness Tracker

1

Status Reporting

Instructions:

1. Review **Milestones** of what is expected to be completed in the phase.
2. Complete required fields (*) in **Status Details**, including **Actual Start Date** and **Status**.
3. Answer all **Questions** (if applicable to the phase).
4. *Commentary required if Status = Off Track. Required (*) to Confirm Completion of Milestones.*
5. Complete the **Mandatory Mid-Point Status Check-In** (if required for this phase).
6. When all phase milestones are complete, select **Completed** status to Confirm Completion of Phase Milestones. Click **Confirm Completion**.

Notes:

- Once you **Confirm Completion**, the status will be locked for that phase.
- If the Phase Status flag shows **At Risk** or **Past Due**, add commentary before submitting.

Resources

- Readiness Checklists
- Job Aid

Need help?
Please contact
future_of_servicing@fanniemae.com

2

RETURN TO PROFILE

3

Servicing Changes Release

Escrow

4

Readiness Phases Target Timeline

Phase 1 – Engagement

Target Start Date: 3/2/2026

Target Mid-Point Check-in Date: N/A

Target Completion Date: 3/30/2026

Phase 2 – Training

Target Start Date: 4/1/2026

Target Mid-Point Check-in Date: N/A

Target Completion Date: 4/30/2026

Phase 3 – Analysis

Target Start Date: 5/1/2026

Target Mid-Point Check-in Date: 5/15/2026

Target Completion Date: 6/30/2026

5

Company Information

Company Name

Type

Servicer Number

Loan Servicer

Servicer

987654321

6

Milestones

Last Modified By: Jane Test Last Modified On: : 2/20/2026 5:03 PM EST

7

Status Details

Actual Start Date

02/02/2026

Status

On Track

Commentary

0/4000

8

Questions

UNDO CHANGES

SAVE CHANGES

Mandatory Mid-Point Status Check-in (Required for Escrow Reporting Only)

Industry partners must complete a Mandatory Mid-Point Status Check-in. If required, check in by the mid-point check-in date. If the check-in is not completed by the deadline, an **At-Risk** flag will display for that phase.

1. Verify an **Actual Start Date** is selected.
2. Ensure that a status of **On Track** or **Off Track** is selected.
3. Click the **Mandatory Mid-Point Status Check-in** button and **Save Changes**
4. Click **Yes** to confirm check-in.

Last Modified By: Jane Test Last Modified On: : 2/17/2026 7:29 PM EST

Status Details

Actual Start Date 1
02/15/2026

MANDATORY MID-POINT STATUS CHECK-IN 3

To complete Mandatory Mid-Point Status Check-In, select **On Track** or **Off Track** to confirm progress towards completing phase milestones by the Target Completion Date then click Save Changes.

Status 2
On Track

Commentary

0/4

> ? Questions

Confirm Registration!

You are about to submit a new registration for, FNM and have updated your release assignment. Once confirmed, a readiness tracker will be created for your organization to report the status on. Do you wish to continue?

4

NO YES

Questions

Some phases have questions that are required to be answered **PRIOR** to performing the **Confirm Completion** step. If there are no questions in a phase, and all milestones have been met, proceed with [Confirm Completion](#) process.

▼ ? Questions

All questions must be answered before Confirming Completion

What is your Customer Integration Testing (CIT) approach?

Testing with both Fannie Mae and Technology Service Provider

--Select--

Testing directly with Fannie Mae

Testing via Technology Service Provider

Testing with both Fannie Mae and Technology Service Provider

B2B Gateway

What approach will you use to submit Loan Escrow events to Fannie Mae?

Application Programming Interface (API)

The API specifications

Yes

▼ ? Questions

No Questions Available

The selected phase does not have any associated questions.

Confirm Completion

- When all phase milestones are completed and all questions are answered, follow the instructions on the left panel to revise status to **Completed**. After a phase is marked complete, it is **locked** and no further updates can be made.
- Click **Confirm Completion**. The Phase Flag will turn green. **If you fail to click on Confirm Completion, the phase will not be considered complete.**

NOTE: If a phase is not completed by the Target Completion Date, a notification email will be sent to the reporting POCs advising that action is required.

[RETURN TO PROFILE](#)

Servicing Changes Release

Escrow Event Reporting (LC)

Readiness Phases Target Timeline

Phase 1 – Engagement

Target Start Date: 2/5/2026

Target Mid-Point Check-In Date: 2/9/2026

Target Completion Date: 4/15/2026

Phase 2 – Training

Target Start Date: 12/17/2025

Target Mid-Point Check-In Date: N/A

Target Completion Date: 5/30/2026

Phase 3 – Analysis

Target Start Date: 10/1/2025

Target Mid-Point Check-In Date: 4/15/2026

Target Completion Date: 7/30/2026

> Company Information

> Milestones

Last Modified By: Jane Test Last Modified On: : 2/20/2026 1:47 PM EST

Status Details

Actual Start Date *

02/05/2026

Actual Completion Date *

02/20/2026

Status

Completed

On behalf of JACK HENRY, I Jane Test, confirm completion of the milestones within Phase 1 – Engagement of release Escrow Event Reporting (LC).

Commentary

0/4000

> ? Questions

UNDO CHANGES

CONFIRM COMPLETION

Phase Flags

There are three Phase Flags. For guidance on resolving **At Risk** and **Past Due** flags, please review the table and Troubleshooting tips below to address each flag and ensure your organization remains on track.

Phase Flags	
	Completed: Phase (status) is Completed and you have confirmed completion of phase milestones.
	The At-Risk flag occurs when - - Your organization has indicated a status Off Track at any time during the phase. - The Mandatory Mid-Point Status Check-In was not completed by the Target Mid-Point Check-In Date. (Required for Escrow Reporting Only. To resolve this flag, update the status to On Track or complete the phase.
	The Past Due flag occurs when your organization has not confirmed a phase as Completed by the Target Completion Date. Complete the phase milestones, update the status to Completed and perform the Confirm Completion step to clear the flag.

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Help

What should I do if I experience technical difficulties?

Contact the [Future of Servicing](#) mailbox and include your contact and company information.

Trouble Shooting Tips

1. If you're having trouble logging in, please contact the **Future of Servicing team** for assistance. The issue may be related to using an outdated link.
2. To clear a **Past Due** or **At Risk** flag for a phase, make sure you have completed all required milestones and answered any required questions. Then, select **Complete** as the status and click **Confirm Completion** at the bottom of the **Status Reporting** page.
3. If you mark a task as complete by mistake, the status cannot be changed. Instead, add a comment in the next phase explaining that the task was completed in error.
4. If you receive a **Past Due email notification**, you do not need to contact the [Future of Servicing mailbox](#). Instead, follow the steps outlined in **Troubleshooting Tip #2** above.

Change Log

Version Number	Publication Date	Description of Change
1	2.20.2026	Initial publication of Job Aid
1.1	5.7.2026	1. Removed reference to mid-point check-in opening 7 days prior to the mid-point date.
		2. Added a note advising if a phase Target Completion Date is missing, an email will be sent to the reporting POCs.
1.2	6.5.2026	Updated link to the Implementation Readiness Tracker in the Job Aid Section. It now points to the correct environment.
1.3	8.26.2026	1. Deleted Escrow Milestones since all milestones will be housed separately.
		2. Updated the profile screenshot that shows releases are display only.
		3. Updated references to Mid-point check in – only required for certain phases within the escrow release.
		4. Checklists have been moved into a separate document.
		5. FAQs have been moved to the main FAQs on the Servicing Platform webpage .
		6. Added trouble shooting tips.