

MBS Quick Reference Guide: User Interface Upgrades

Background

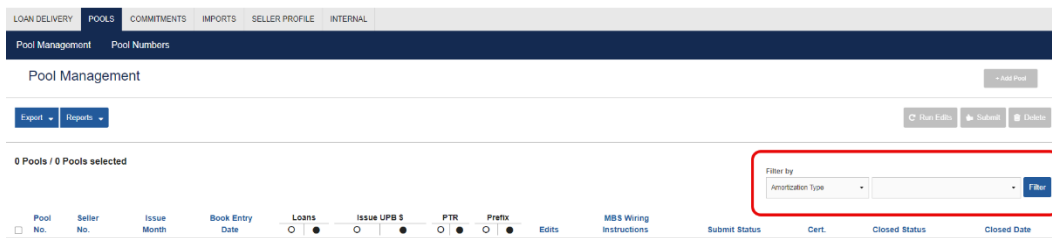
Fannie Mae is introducing User Interface (UI) upgrades in Loan Delivery. These changes will enhance two functions in the Loan Delivery UI: Pool Management Screen filter capabilities and Pool Issue Date selection. Below we have outlined the changes users will see.

Note: There will be no required action to convert to the upgrades UI, we will make the change on our end.

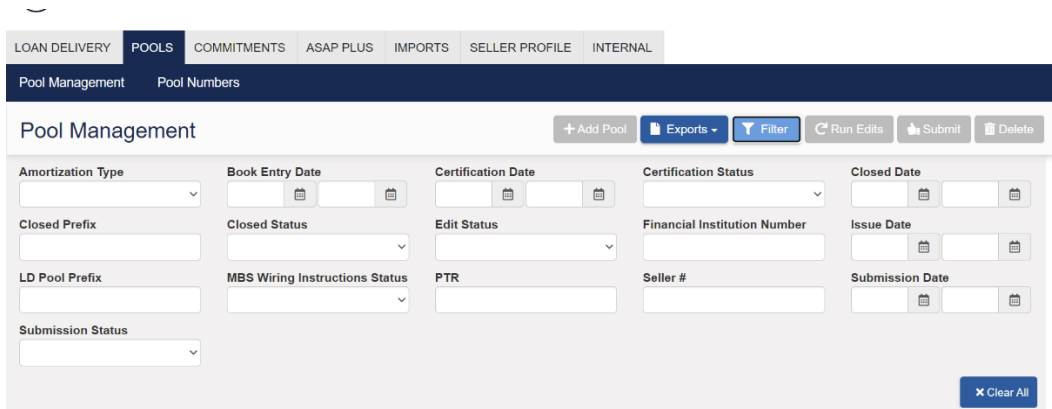
New filter capabilities

The filter options have been upgraded from a drop down and select menu to a more intuitive filter providing users the ability to view all applicable filters at once to be able to filter results more efficiently. Note: This filter functionality is currently available for Whole Loans.

Current:



New:





Pool Issue date

The UI update will make all calendars uniform within Loan Delivery. The Pool Issue Date field on the Pool Details screen will change with this update. Users must select a valid pool issue date; the UI will no longer populate a valid date automatically.

Current:

The screenshot shows a form field labeled "Pool Issue Date" with the value "08/01/2024". A date picker is open, showing the year "2024" and the months "Jan", "Feb", "Mar", "Apr", "May", "Jun", "Jul", "Aug", "Sep", "Oct", "Nov", and "Dec". The month "Aug" is highlighted in blue.

New:

The screenshot shows a form field labeled "Pool Issue Date" with the value "08/04/2024". A date picker is open, showing the month "August" and the year "2024". The date picker displays a calendar grid with the days of the week "Sun", "Mon", "Tue", "Wed", "Thu", "Fri", and "Sat". The date "4" is selected, and the date "8" is highlighted in blue.

In this example, the user selected a Pool Issue date of 08/04/2024, however this is not a valid Pool Issue Date. If an invalid Pool Issue Date is selected, a fatal edit will fire:

Fatal Edit 1737– Pool Issue Date must be on the first day of the month. [SID: 674]

To resolve edit 1737, update the Pool Issue Date to the first day of the month and rerun eligibility.