



Master Servicing Release Notes

Master Servicing Portfolio Manager 2.3 Release Notes

Effective **June 24, 2023**, the **Master Servicing Portfolio Manager 2.3 Release** will be implemented. Master Servicing Portfolio Manager is an application that offers servicers management oversight and self-service functionality related to performance, loan activities and portfolio management that will help drive efficiency and straight-through processing. Currently the application provides servicers access to Loan and Cash exceptions and allows both servicers and Fannie Mae visibility into Resolution Plans.

This release will implement a policy change announced in **LL-2023-05** to introduce new functionality to Master Servicing Portfolio Manager, to aid in enabling the future retirement of the Servicer's Reconciliation Facility (SURF) application.

The release will include the following:

Data Request

The Data Request capability in Master Servicing Portfolio Manager will include the following self-service data downloads that are currently available in SURF.

- PFP Book, PFP New Issue, ARM and Fixed downloads will be made available with three months of historical data.
- Enhanced, Enhanced MBS, Enhanced S/S Whole Loans downloads will provide the near real time data at the 9-digit level.
- Master Servicing Portfolio Manager will allow users to select multiple 9-digit servicer numbers at one time, reducing the effort of downloading multiple files.

Additional details on how to navigate through the Data Request capability can be found in the user guide under the help button on the Master Servicing Portfolio Manager home screen.

Additional Information

For more information about this release, please reach out to master_servicing@fanniemae.com.

Other helpful resources:

- Visit the [Master Servicing Portfolio Manager](#) page
- Read the [Master Servicing Portfolio Manager User Guide](#)