Fannie Mae

Mortgage Insurance Claims Portal

Messages Enhancement - SERVICER JOB AID

Version 1.0

September 2023

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Overview

Effective September 29, 2023, Fannie Mae will introduce messaging functionality to the Mortgage Insurance Claims Platform (MICP). This new functionality is designed to replace the existing Communication function. This will be accomplished in a phased approach where loans with existing communication exchanges will reflect both the Messages and Communications options. Users will be able to respond to existing Communications but will not be able to create new communications on those loans. Loans without existing communication exchanges will only reflect the Messages option. The Communications option will be phased out in an upcoming release. This document will only address the new Messages feature.

Message Status Icon Legend

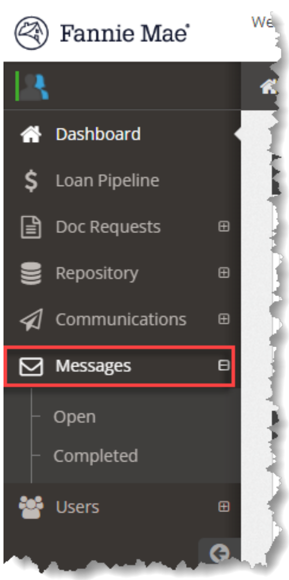
Icon	Definition
	New Fannie Mae Initial Message
	New servicer Initial Message
	New MICO Initial Message
	Fannie Mae Note added
	Servicer Note added
	MICO Note added
	Fannie Mae Responding Message
	MICO Responding Message
	Servicer Responding Message
	Complete

Message Access

There are a few ways to access messages in MICP: from the main menu, the dashboard widget, and the loan pipeline tabs.

Messages via Main Menu

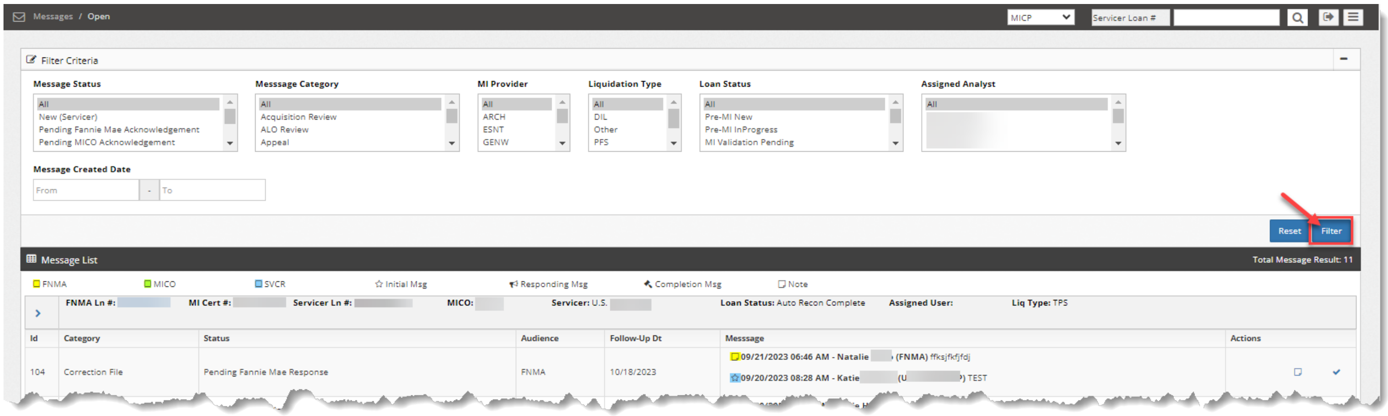
The Messages option can be found in the menu on the left side of the screen. Click the **+** to open the options.



Open Messages

Open Messages contains the list of loan correspondence that has NOT yet been resolved and marked as “Completed.” Set the filter options to **All** and **Filter** to display the first 500 unresolved messages. To drill down to a specific population, make selections from the filter options.

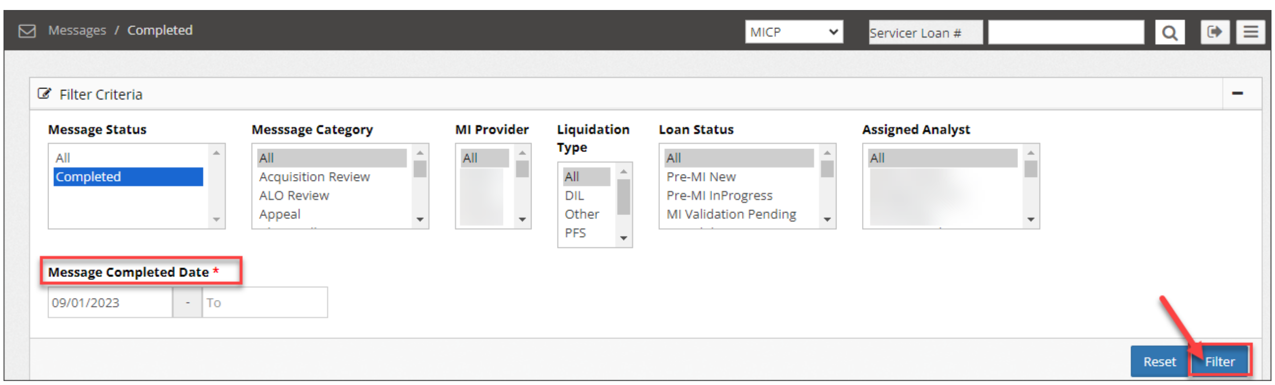
If the entire message exceeds the Message field, click the message to expand the field and view the entire message.



Completed Messages

Completed Messages contains the list of loans that have message exchanges that have been resolved and marked **Completed**. To view a specific population of completed Message exchanges, utilize the filters at the top of the page.

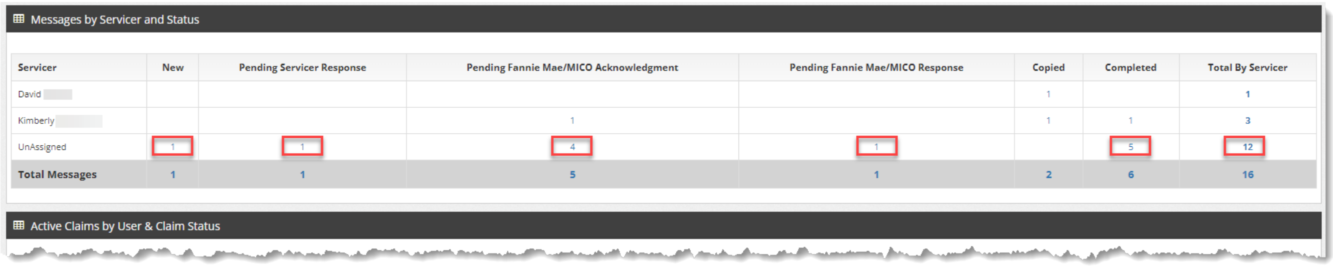
Reminder: Due to the large number of **Completed Messages**, a starting date range is required in order to filter to a managable population.



Messages via Dashboard Widget

The MICP dashboard now hosts a **Messages by Servicer and Status** display.

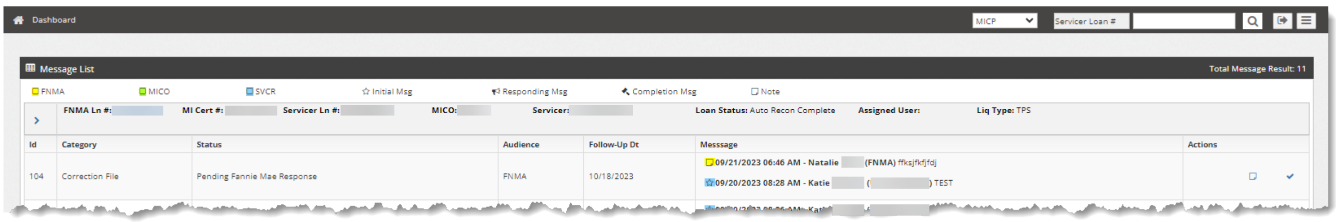
This display parses messages into various statuses. Each blue number is a hyperlink that will direct the user to the population of messages associated with each status.



Messages by Servicer and Status

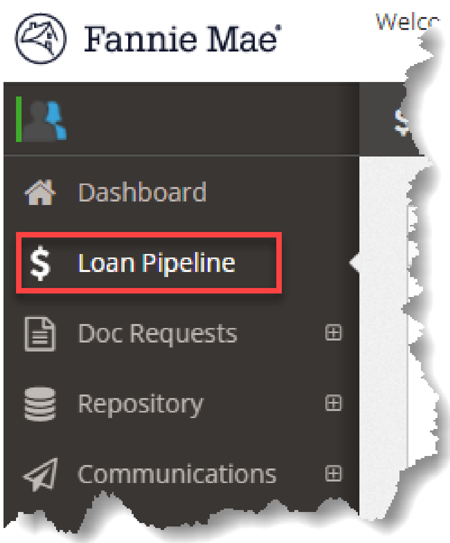
Servicer	New	Pending Servicer Response	Pending Fannie Mae/MICO Acknowledgment	Pending Fannie Mae/MICO Response	Copied	Completed	Total By Servicer
David					1		1
Kimberly			1		1	1	3
UnAssigned	1	1	4	1		5	12
Total Messages	1	1	5	1	2	6	16

Active Claims by User & Claim Status

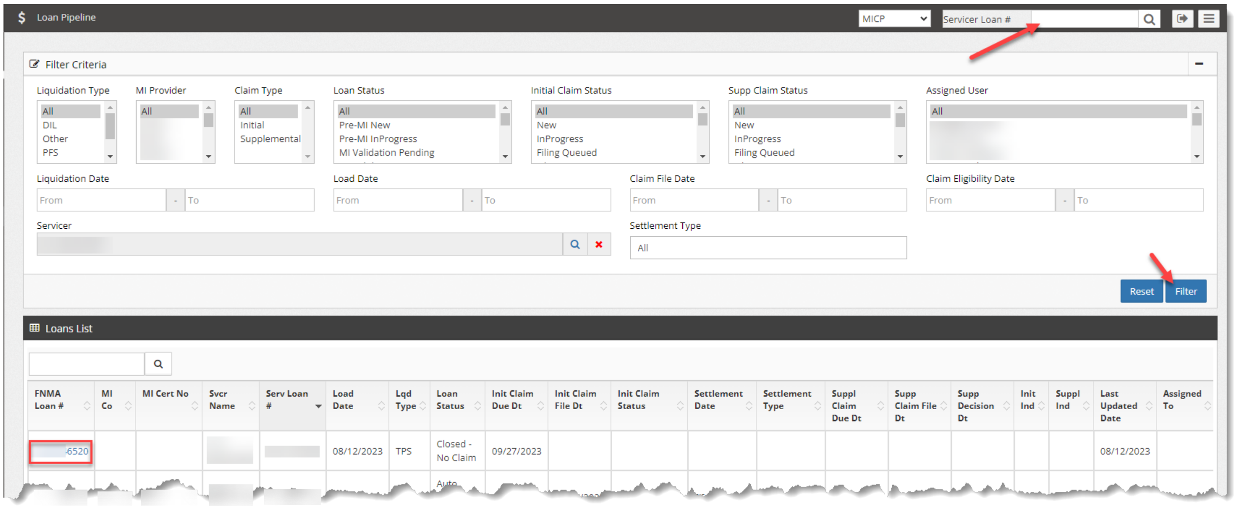


Message via Loan Pipeline

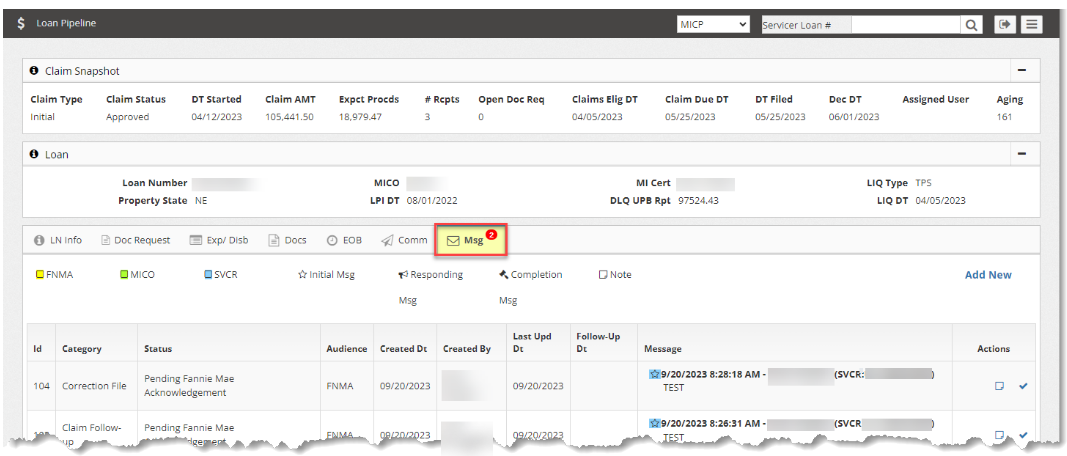
1. Select **Loan Pipeline** from the Main Menu



2. Use filter criteria to drill down to a specific loan or population of loans. Click the blue FNMA Loan # hyperlink to open the loan.



3. Click the **Msg** tab. The new message count will be displayed in the corner of the tab.



Action Items

The Actions column, found within the Messages section and on the Msg tab contains icons which are defined in the Action Item Legend below. These icons are hyperlinks to tasks that will move a message status forward or resolve it and close out the correspondence thread. Steps to complete these tasks are outlined below.

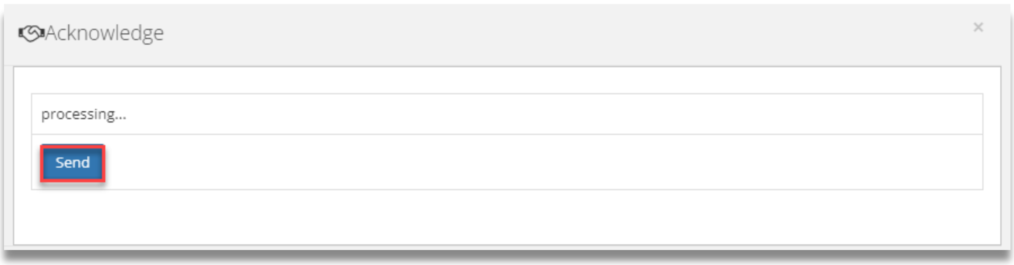
Action Item Legend

Icon	Definition
	Acknowledge
	Set follow-up date
	Reply and send
	Add a note
	Complete

Acknowledge

Use the Action icon to acknowledge the receipt of a message.

1. Click the **Acknowledge** icon in the Actions column.
2. Click **Send**.

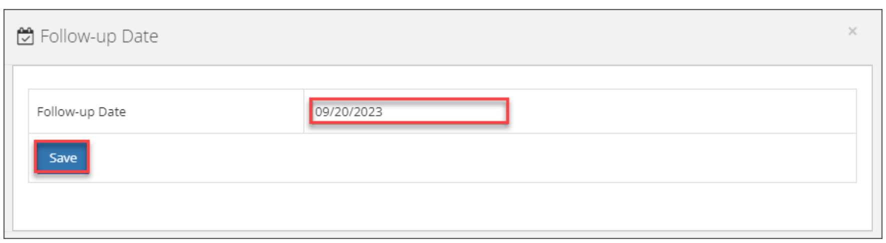


This action will update the status to **Processing** in the recipient's queue.

Set a follow-up date.

Use the Action icon to add a follow-up date to a message.

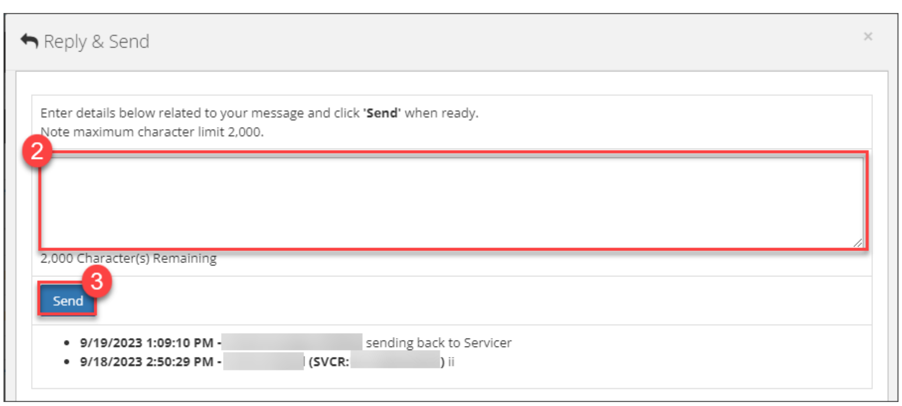
1. Click the Set follow-up date icon in the Action column.
2. Enter the follow-up date.
3. Click **Save**.



Reply and Send

Use the Action icon to respond to a message.

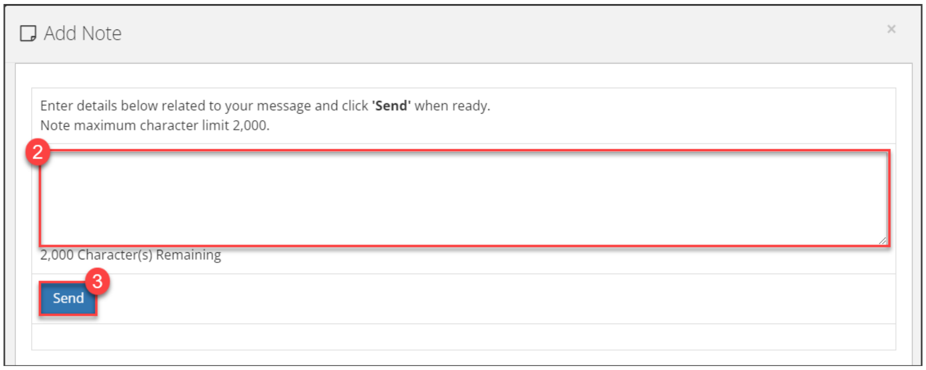
1. Click the **Reply and Send** icon in the **Action** column. The message thread will display in the **Reply and Send** box.
2. Enter comments. (2,000 character limit).
3. Click **Send**.



Add a Note

Use the Action icon to add a note to a message.

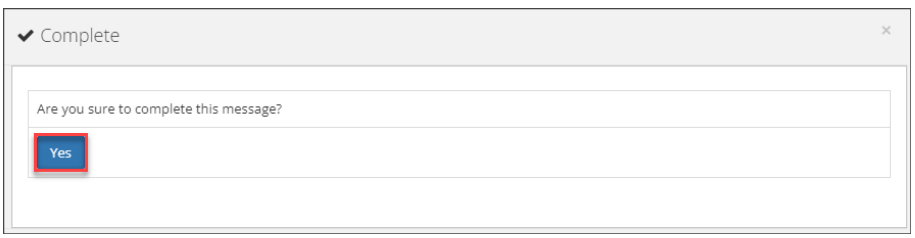
1. Click the **Note** icon in the **Action** column.
2. Enter comments. (2,000 character limit).
3. Click **Send**. The message will appear in the **Message** column at the top of the thread.



Complete message exchange

Use the Action icon to add a note to a resolve a Message thread.

1. Click the **Complete** icon in the **Action** column.
2. Click **Yes** to the pop-up box question “Are you sure you want to complete this message?”

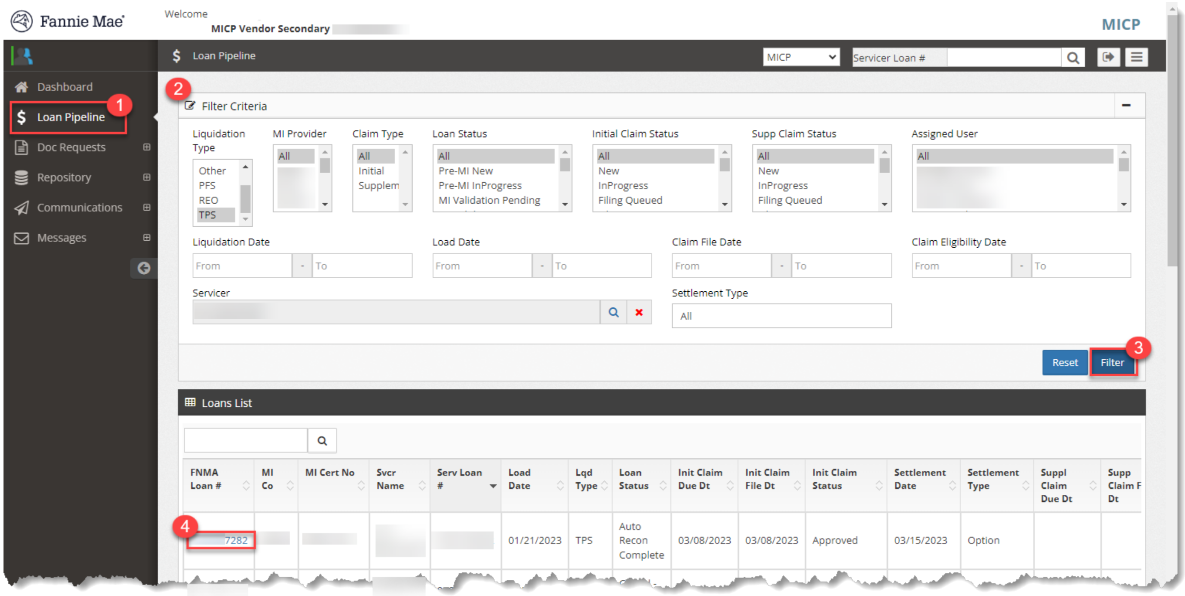


Create New Messages

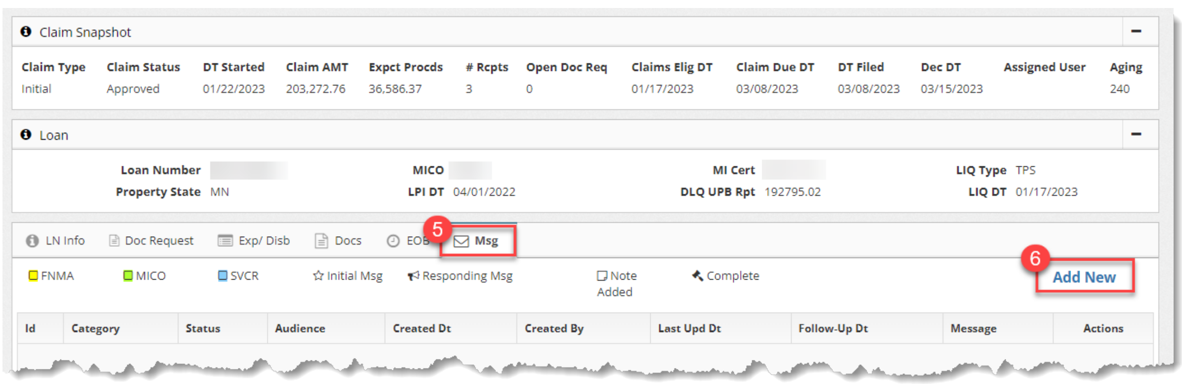
New messages can be created in MICP. Users can direct correspondence to the Mortgage Insurance Company (MICO) or Fannie Mae. Messages are visible to all parties and all parties can add clarifying notes to messages.

1. Click **Loan Pipeline** from the menu on the left.
2. Use the filters to locate a specific loan or a certain population of loans.
3. Click **Filter**.

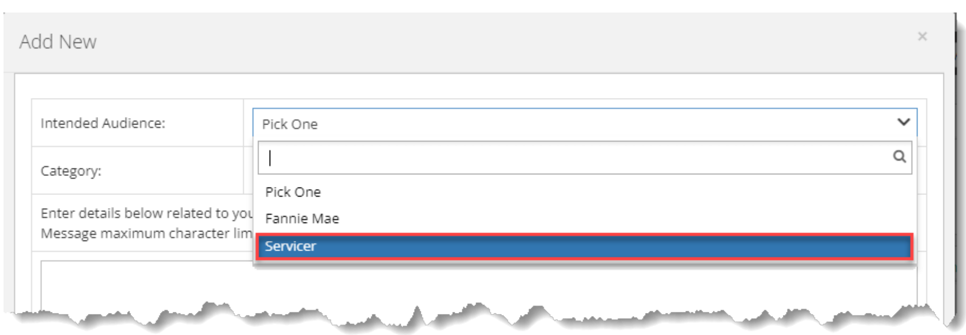
4. Click the blue **FNMA Loan #** to select a loan from the results.



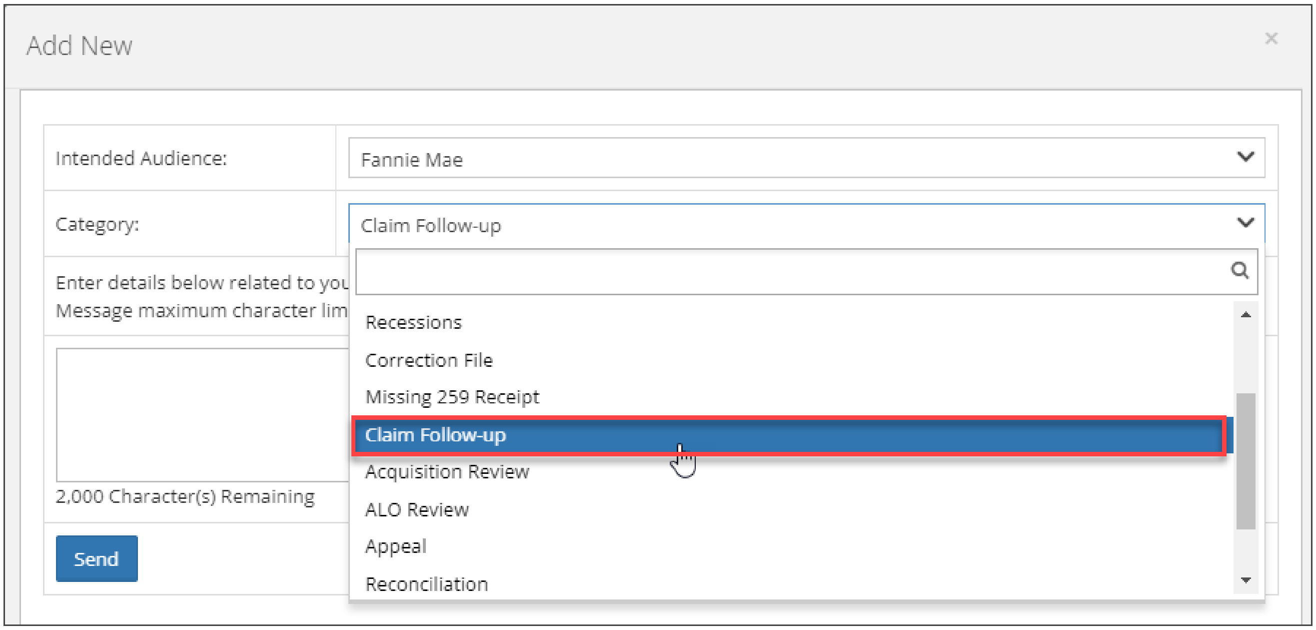
5. Click the **Msg** tab. Existing messages will display below.
6. Click the **Add New** link to create a new message.



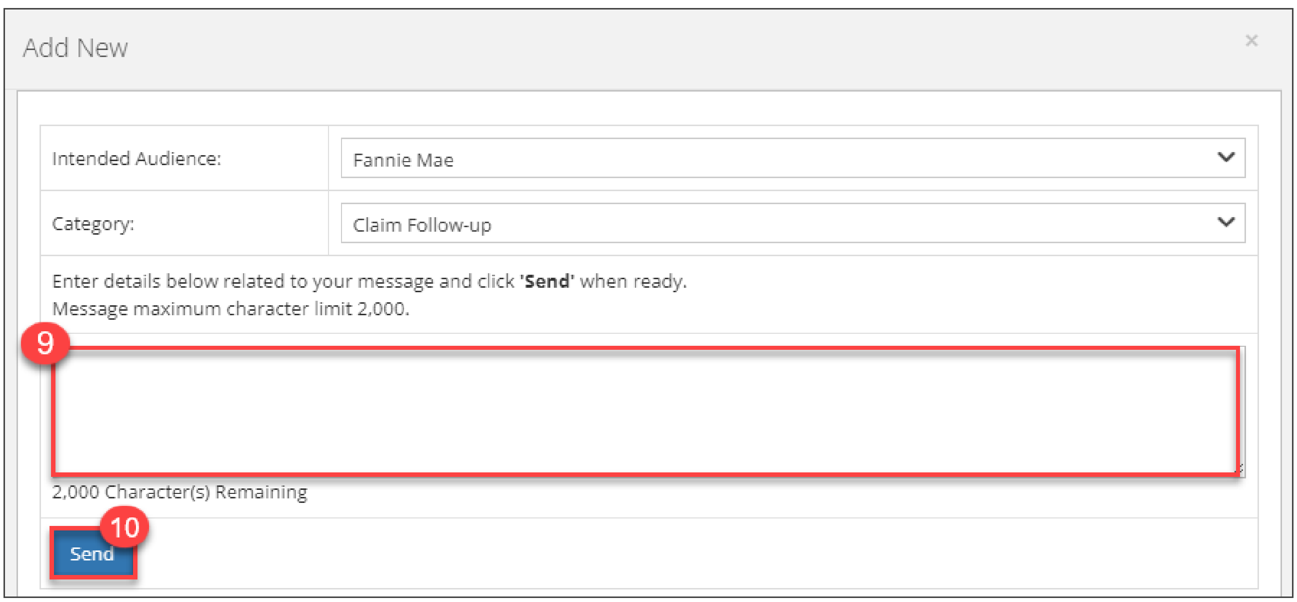
7. Select the **Intended Audience** from the drop-down.



8. Select the **Category** from the drop-down.



9. Enter the message text in the text box. The text box is limited to 2,000 characters.
10. Click **Send**.



11. Click **Close** to exit any text box without sending the message.