



Mortgage Insurance Claims Portal

Messages Enhancement - SERVICER JOB AID

Version 1.0

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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

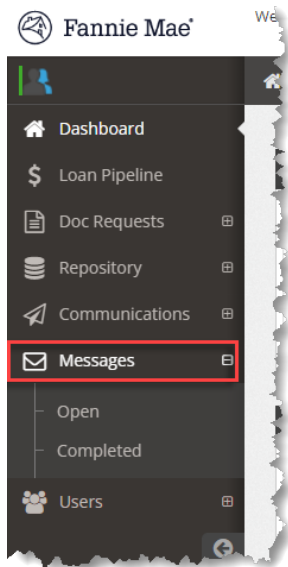
Icon	Definition
	New Fannie Mae Initial Message
	New servicer Initial Message
	New MICO Initial Message
	Fannie Mae Note added
	Servicer Note added
	MICO Note added
	Fannie Mae Responding Message
	MICO Responding Message
	Servicer Responding Message
	Complete

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.

Messages / Open

Filter Criteria

Message Status: All
 Message Category: All
 MI Provider: All
 Liquidation Type: All
 Loan Status: All
 Assigned Analyst: All

Message Created Date: From - To

Reset Filter

Message List

FNMA Ln #: MI Cert #: Servicer Ln #: MICO: Servicer: U.S. Loan Status: Auto Recon Complete Assigned User: Liq Type: TFS

ID	Category	Status	Audience	Follow-Up Dt	Message	Actions
104	Correction File	Pending Fannie Mae Response	FNMA	10/18/2023	09/21/2023 06:46 AM - Natalie (FNMA) fksj/fjfd 09/20/2023 08:28 AM - Katie (U) TEST	

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 manageable population.

Messages / Completed

Filter Criteria

Message Status: Completed
 Message Category: All
 MI Provider: All
 Liquidation Type: All
 Loan Status: All
 Assigned Analyst: All

Message Completed Date: 09/01/2023 - To

Reset Filter



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.

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

Dashboard

MICP | Servicer Loan #

Message List

FNMA MICO SVCR

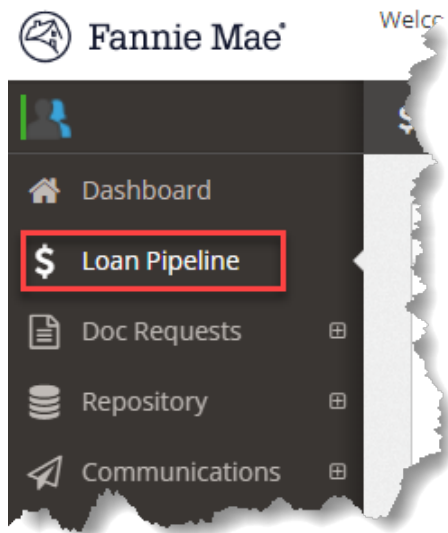
Initial Msg | Responding Msg | Completion Msg | Note

FNMA Ln #: MI Cert #: Servicer Ln #: MICO: Servicer: Loan Status: Auto Recon Complete Assigned User: Liq Type: TPS

ID	Category	Status	Audience	Follow-Up Dt	Message	Actions
104	Correction File	Pending Fannie Mae Response	FNMA	10/18/2023	<p>09/21/2023 06:46 AM - Natalie (FNMA) fksjfdjfdj</p> <p>09/20/2023 08:28 AM - Katie () TEST</p>	<input type="checkbox"/> <input checked="" type="checkbox"/>

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.

The screenshot shows the 'Loan Pipeline' interface. At the top right, there is a search bar with 'MICP' and 'Servicer Loan #' entered. Below this is a 'Filter Criteria' section with various dropdown menus for 'Liquidation Type', 'MI Provider', 'Claim Type', 'Loan Status', 'Initial Claim Status', 'Supp Claim Status', and 'Assigned User'. There are also date range fields for 'Liquidation Date', 'Load Date', 'Claim File Date', and 'Claim Eligibility Date'. At the bottom right of the filter section, there are 'Reset' and 'Filter' buttons. Below the filter section is a 'Loans List' table with columns for 'FNMA Loan #', 'MI Co', 'MI Cert No', 'Svr Name', 'Serv Loan #', 'Load Date', 'Lqd Type', 'Loan Status', 'Init Claim Due Dt', 'Init Claim File Dt', 'Init Claim Status', 'Settlement Date', 'Settlement Type', 'Suppl Claim Due Dt', 'Suppl Claim File Dt', 'Suppl Decision Dt', 'Init Ind', 'Suppl Ind', 'Last Updated Date', and 'Assigned To'. The first row in the table has a red box around the 'FNMA Loan #' value '16520'.

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

The screenshot shows the 'Loan Pipeline' interface with the 'Msg' tab selected. At the top, there is a 'Claim Snapshot' section with various metrics. Below that is a 'Loan' section with details like 'Loan Number', 'MICO', 'MI Cert', and 'LIQ Type'. The 'Msg' tab is highlighted with a red box and a '2' message count. Below the 'Msg' tab is a table of messages with columns for 'Id', 'Category', 'Status', 'Audience', 'Created Dt', 'Created By', 'Last Upd Dt', 'Follow-Up Dt', 'Message', and 'Actions'. The first message has an 'Id' of 104 and a 'Category' of 'Correction File'.

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

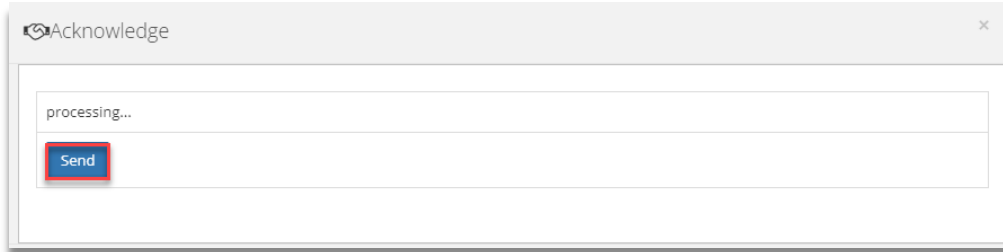
Icon	Definition
	Acknowledge
	Set follow-up date
	Reply and send
	Add a note
	Complete



Acknowledge


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

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

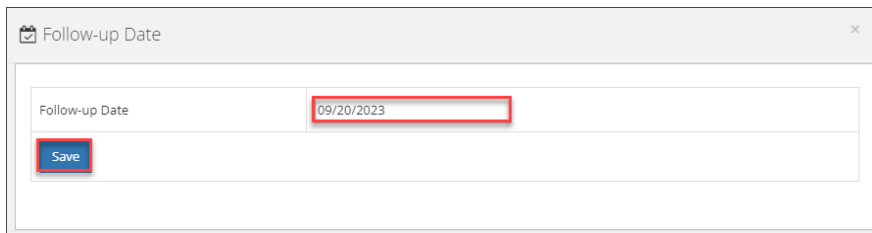


This action will update the status to **Processing** in the recipient's queue.


Set a follow-up date.

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

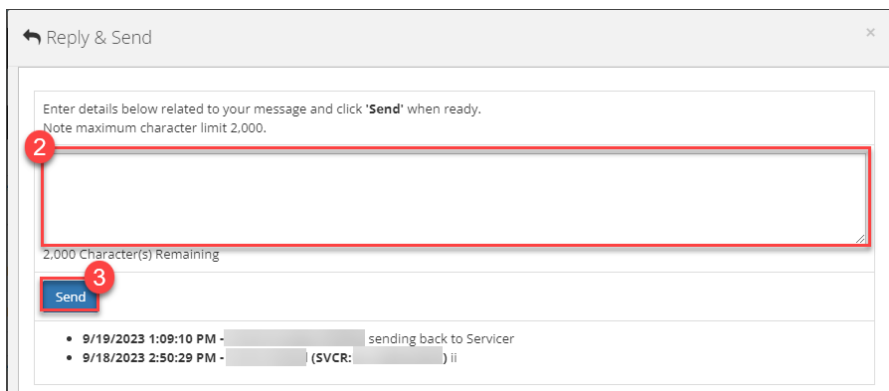
1. Click the Set follow-up date icon in the Action column.
2. Enter the follow-up date.
3. Click **Save**.



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**.

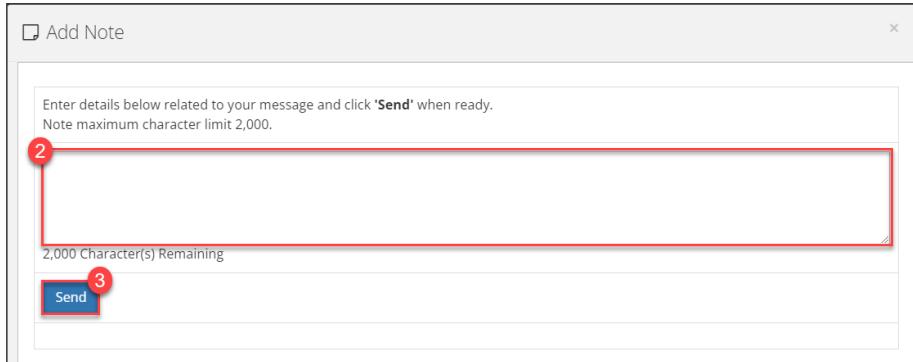





Add a Note

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.

The screenshot shows the 'Add New' form with the 'Intended Audience' set to 'Fannie Mae' and the 'Category' dropdown menu open. The dropdown menu lists several options: Recessions, Correction File, Missing 259 Receipt, Claim Follow-up (highlighted in blue), Acquisition Review, ALO Review, Appeal, and Reconciliation. A mouse cursor is pointing at the 'Claim Follow-up' option. The 'Send' button is visible at the bottom left of the form.

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

10. Click **Send**.

The screenshot shows the 'Add New' form with the 'Intended Audience' set to 'Fannie Mae' and the 'Category' set to 'Claim Follow-up'. The message text box is highlighted with a red border and a red circle containing the number '9'. The 'Send' button is also highlighted with a red border and a red circle containing the number '10'. The text box is empty, and the 'Send' button is located at the bottom left of the form.

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

