Fannie Mae®

Fannie Mae Servicing Platform User Interface (UI) User Guide

Version 5.0

November 2026

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Introduction to the Fannie Mae Servicing Platform

General Overview

The Fannie Mae Servicing Platform is a centralized solution that supports servicers in reporting, reviewing, and managing loan-level servicing activity across multiple applications. The platform is designed to provide a consistent user experience, improve data quality and transparency, and support timely servicing processes through available submission channels and user interface (UI) workflows. This user guide provides instructions for accessing, navigating, and using the Servicing Platform.

This guide begins with instructions that apply across the Servicing Platform, followed by separate chapters for Escrow Reporting, Delinquency Reporting, and Loan Data Change. Refer to the applicable chapter for application-specific access requirements, roles, screens, and procedures. The guide will be updated as additional applications and capabilities are introduced.

Benefits

The Servicing Platform provides a shared foundation for accessing and managing servicing information across an expanding range of functions. Key platform-level benefits include:

- A centralized, scalable foundation for managing loan-level servicing activity across current and future capabilities.
- A consistent user experience and common reporting framework across servicing functions.
- Streamlined workflows and reduced manual reconciliation.
- Improved data quality, transparency, and timely access to servicing information.
- A single platform that can expand to support additional servicing applications and capabilities.

Browser requirements

For optimal performance, the preferred browser for the Servicing Platform is Google Chrome; however, Microsoft Edge is also acceptable.

System availability

The Servicing Platform is available Monday through Saturday, 24 hours a day. If the Servicing Platform is unavailable during these hours, a notification will be posted.

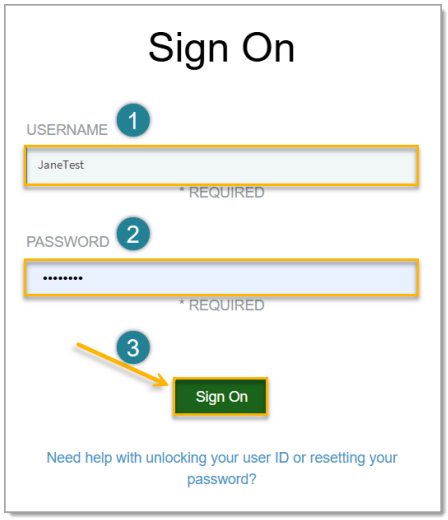
Access to the Servicing Platform

- For Escrow Reporting UI Production access in the Servicing Platform, your company's Technology Manager Corporate Administrator will provide access via Fannie Mae Technology Manager on your behalf. See the Escrow Reporting - Production access, readiness requirements, and roles section.
- For Delinquency Reporting UI testing environment access, see the Delinquency Reporting - Testing access section.
- For Loan Data Change Reporting UI testing environment access, see the Loan Data Change – Testing access section.

Log in to the Servicing Platform

All Servicing Platform applications are accessed through single sign-on.

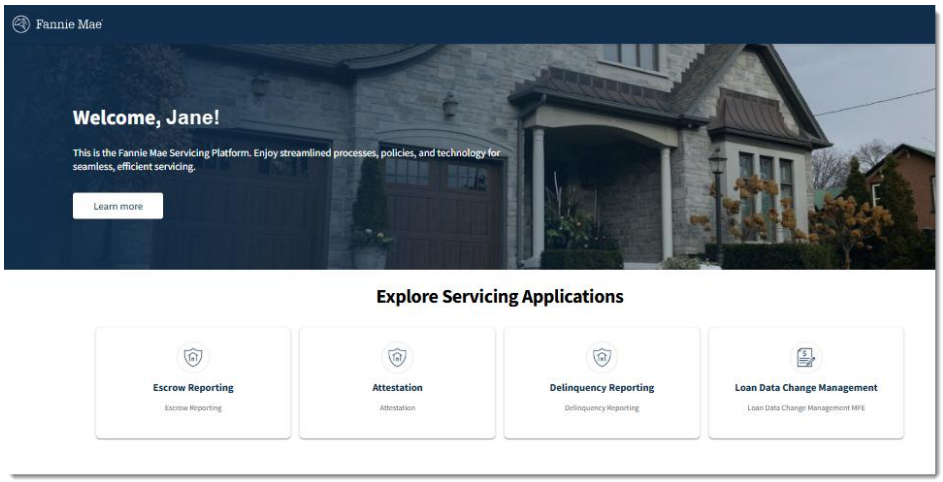
1. Enter the user ID provided by Fannie Mae.
2. Enter your password.
3. Click **Sign On.**



Open a capability

The Welcome page displays the reporting capabilities available to you, based on the roles you are provisioned for. To open a capability:

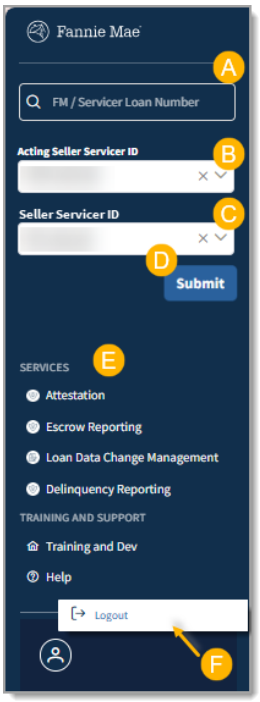
1. Locate the application tile for the reporting capability you want to use.
2. Select the applicable tile.
3. Confirm that the selected reporting page opens.



If the expected application tile does not appear, ask your Technology Manager Corporate Administrator to verify the required role in Technology Manager and then sign in again.

Servicing Platform navigation panel overview

Each application is accessible from the left-hand navigation panel. Your navigation panel may appear slightly different from the example below based on your provisioned roles. This panel will continue to evolve as new capabilities are released.



	Field	Definition
A	Fannie Mae or Servicer Loan Number	Enter the Fannie Mae Loan Number or Servicer Loan Number to access specific loan details.
B	Acting Seller Servicer ID	5-digit Servicer Number for the institution that is servicing the loan today.
C	Seller Servicer ID*	The unique **9-digit Seller Servicer number** assigned to the accountable servicing entity *Required field.
D	Submit	Click **Submit** after entering at least one filtering option PLUS the Seller Servicer ID.
E	Services options	Navigate between services by selecting from the Services menu.
F	User Profile	Shortcut to log out.

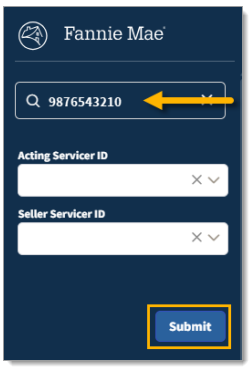
Loan search options

Choose one of the following search methods:

1. Enter a **Fannie Mae or Servicer Loan Number** to view the loan details.
2. Select a **Seller Servicer ID** to view loans associated with that ID.
3. To narrow the results by **Acting Seller Servicer ID**, first select the applicable **Seller Servicer ID** from the drop-down menu, and then select the **Acting Seller Servicer ID**.

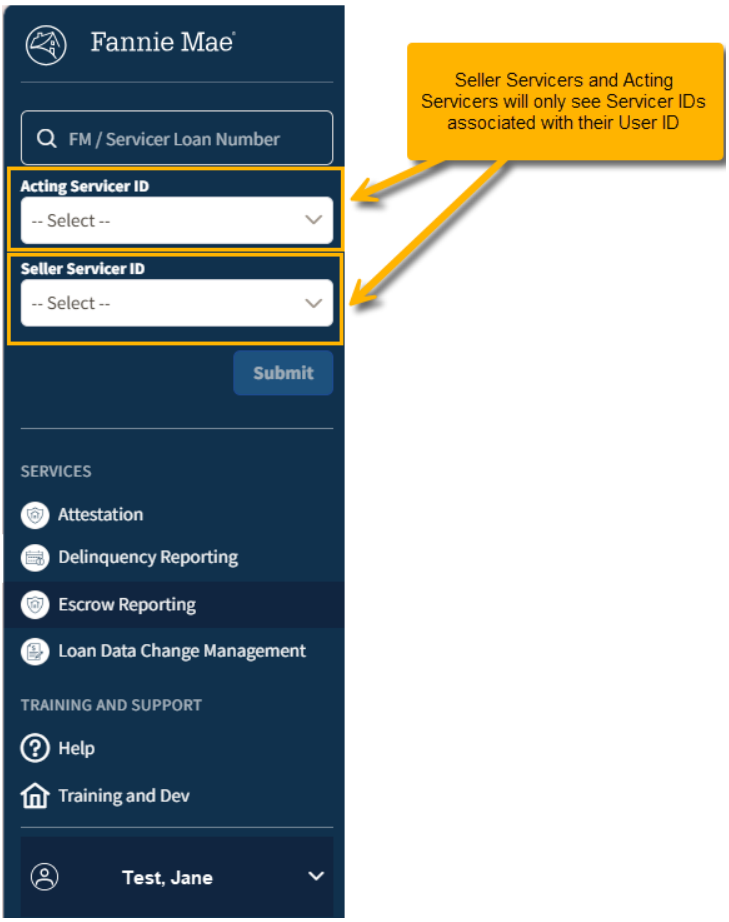
Search by Fannie Mae Loan Number or Servicer Loan Number

Enter the **Fannie Mae or Servicer Loan Number** in the search field, and then press **Enter** to view the loan details.



Search by Seller Servicer ID or Acting Seller Servicer ID

1. Select the **Seller Servicer ID** from the drop-down menu to view loans associated with that ID.
2. Narrow the results by **Acting Seller Servicer ID**, first select the applicable **Seller Servicer ID**, and then select the **Acting Seller Servicer ID**.
3. Click **Submit** to view the results.



Escrow Reporting

Overview

Fannie Mae is changing how servicers report and manage loan-level activity through a multi-year transformation initiative. The first phase in this transformation is the introduction of Escrow Reporting.

The Servicing Platform allows users to view current escrow balance and loan position history for each Escrow Category Type, enhancing transparency and operational efficiency. Escrow Reporting will provide comprehensive visibility into escrow balances held by servicers on behalf of borrowers, strengthening risk management and ensuring alignment between servicers' records and Fannie Mae.

Production access, readiness requirements and roles

Production readiness requirements

Before users can access Escrow Reporting in production, the servicer must meet the production readiness criteria below and complete the provisioning process:

1. Complete two consecutive months of Escrow Reporting UI CIT testing requirements.
2. Confirm Escrow Reporting testing completion in the Implementation Readiness Tracker.
3. Fannie Mae will validate completion of two successful Escrow Reporting UI CIT cycles.
4. After validation, Fannie Mae initiates Escrow Reporting provisioning in the Servicing Platform by Servicer Name.
5. Fannie Mae will notify the servicer that Escrow Reporting is available for provisioning in Technology Manager.
6. Have your Technology Manager Corporate Administrator assign the appropriate Escrow Reporting role or roles. See Technology Manager Roles for Escrow Reporting below.
7. After provisioning is complete, sign in to the Servicing Platform and confirm that the Escrow Reporting application tile appears on the Welcome page.

Production access process and roles

In Technology Manager, corporate admins will:

1. In Technology Manager, go to Manage Applications > Available Applications and select Fannie Mae Servicing Platform.
   - Accept the Terms and Conditions, if prompted.
   - Assign the appropriate data folders for use with the application.
   - For additional guidance, see Setup Available Applications
2. Grant user access to the Fannie Mae Servicing Platform and Escrow Reporting.
   - After the Fannie Mae Servicing Platform is available to your organization, assign the application, applicable data folder(s), and required Escrow Reporting roles to each user.
   - For detailed instructions, see Grant User Access to an Application.

   Important: Users must be granted access to the Fannie Mae Servicing Platform before the Escrow Reporting roles can be assigned.

Roles	Access provided
▪ **LMS_Portal_View**	Provides access to the Fannie Mae Servicing Platform Landing Page.
AND ONE OF THE FOLLOWING	
▪ **LMS_Escrow_View**	Provides access to the Fannie Mae Servicing Platform and Escrow screens in **read-only** mode.
OR	
▪ **LMS_Escrow_Update**	Provides access to the Fannie Mae Servicing Platform Landing Page and Escrow screens in **read-write** mode.

If you experience any issues with production access or if you do not know who your corporate admin is, contact the **Technology Support Center** (see below) or for self-service, review.

Instructions resources:

- Technology Manager Job Aids
- Setup Available Applications
- Create New User
- Grant User Access to an Application
- Who Are My Corporate Administrators

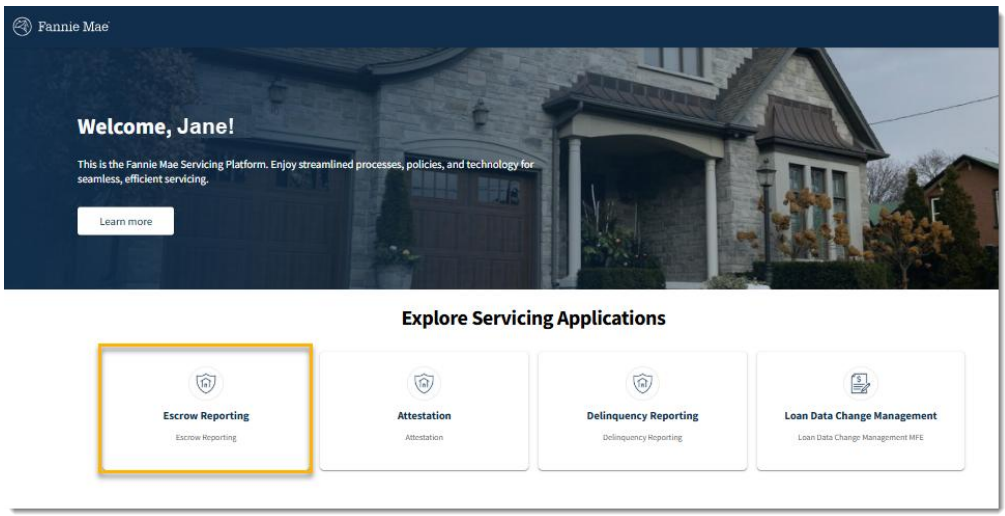
Support:

- Technology Manager webpage
- Technology Support Center
- Technology Support Center phone:
  1- 800-232-6643 (Option 1, then Option 1 again)

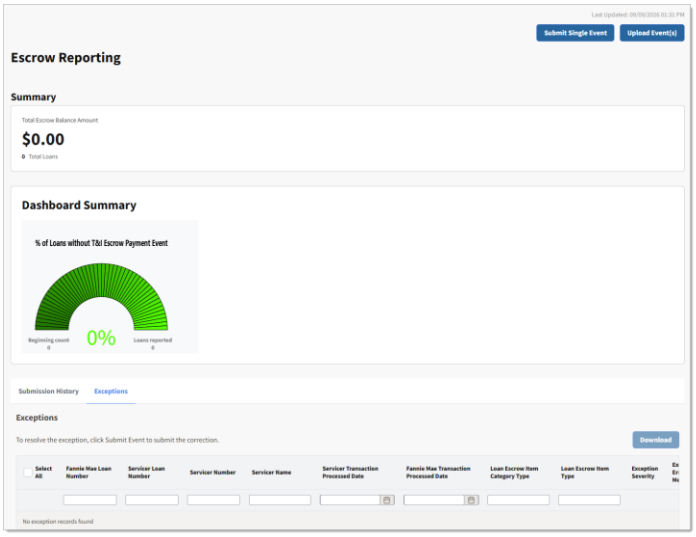
Open Escrow Reporting

Log into the Servicing Platform, as shown above, follow the steps below to open the Escrow Reporting application.

Select **Escrow Reporting** from the application tiles on the Welcome page to navigate to the Escrow Reporting page.

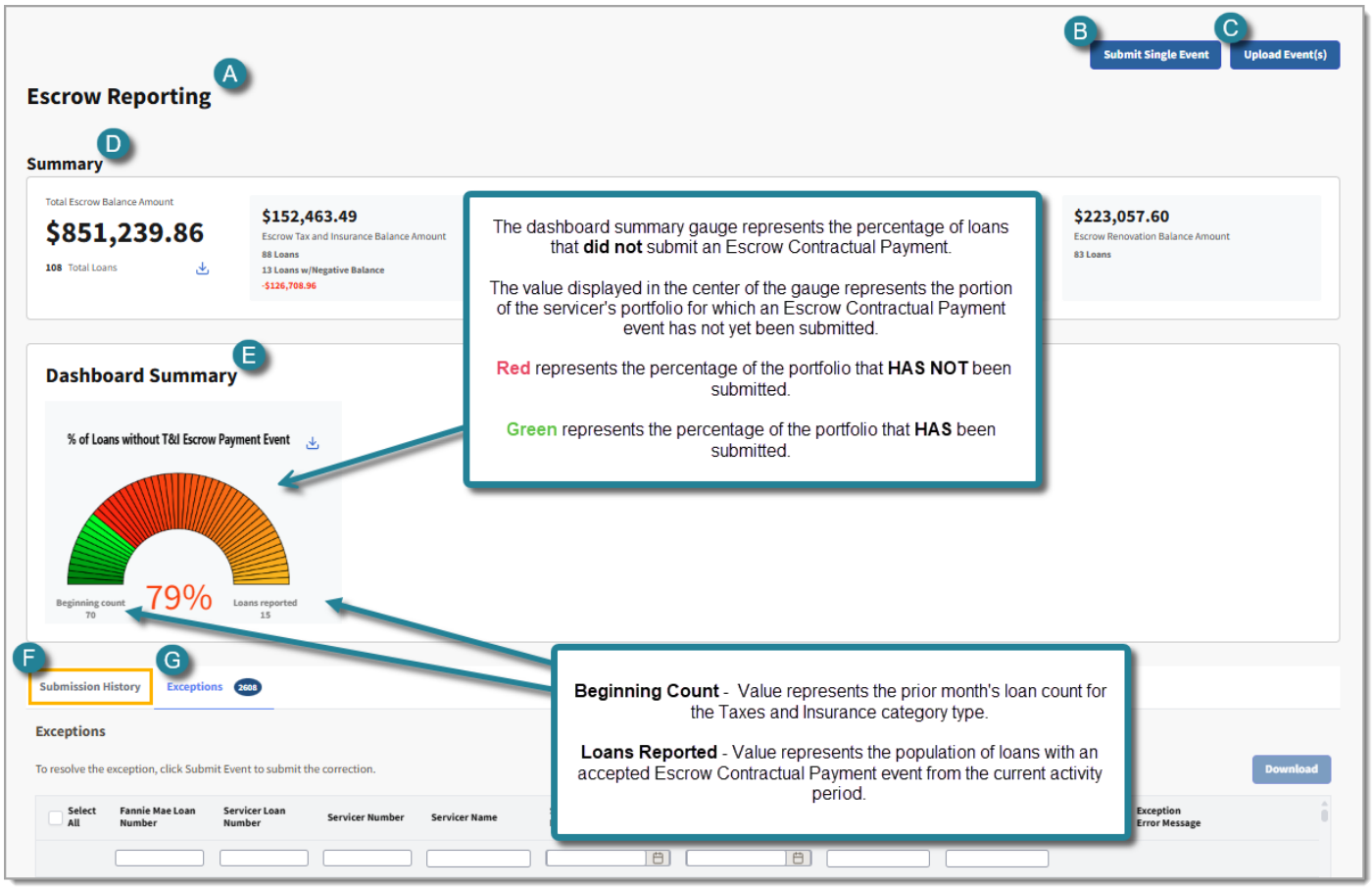


When accessing the Servicing Platform for the first time, all fields on the Escrow Reporting screen will be blank, as shown below. As setup events are successfully processed, the **Summary** will populate with the applicable counts and balance amounts.



Navigation

	Field Name	Description
A	Escrow Reporting	Servicing capability used to report escrow activity via the Fannie Mae Servicing Platform.
B	Submit Single Event	Allows users to submit a single escrow event.
C	Upload Event(s)	Allows users to bulk upload multiple escrow events in a .csv format using a downloadable template.
D	Summary	Displays the **total escrow balance** and **unique loan count**, broken down by **escrow item category**.
E	Dashboard Summary	Displays the percentage of loans that **did not** report an **Escrow Contractual Payment** ***Note:*** *During the first month of Escrow Reporting, the gauge will display 100% in red, indicating that no Escrow Contractual Payment events have been reported.* At the start of each subsequent month, the gauge resets to red at 100%. As events are processed, it transitions to green, the percentage value decreases, and the loan counts populate.
F	Submission History	Shows the status of all submitted events by submission source.
G	Exceptions	Displays a detailed list of messages for each event that was not accepted.



Summary panel

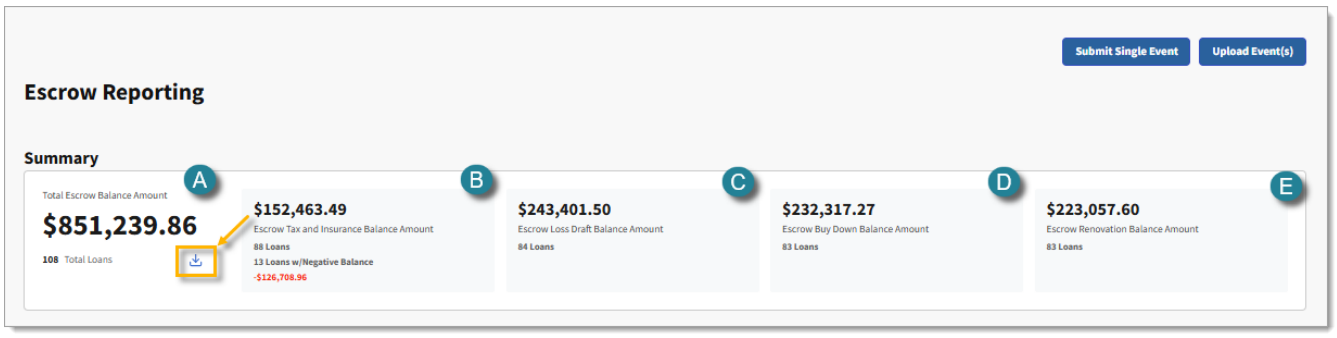
The **Escrow Balance Summary** provides the latest summary of balances and loan counts across all four escrow category types.

The Dashboard Summary displays balances and loan counts for:

A. Total Escrow Balance Amount
B. Escrow Tax and Insurance Balance Amount
C. Escrow Loss Draft Balance Amount
D. Escrow Buy Down Balance Amount
E. Escrow Renovation Balance Amount

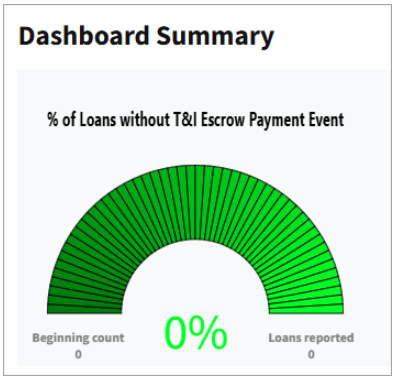
Refer to the Loan Management: Servicing Events and Data Requirements for definitions of these escrow category types.

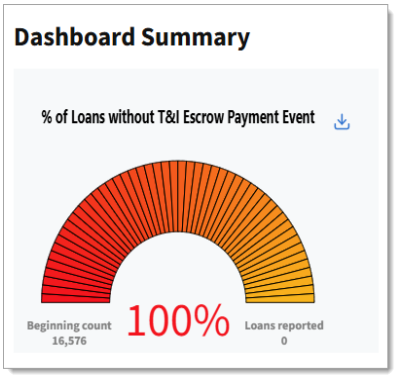
Click the Download icon to download the escrow summary balances for all escrow category types.



Dashboard summary

The Dashboard Summary gauge reflects the percentage of the servicer's escrowed loans for which a T&I escrow contractual payment has **not** been submitted. During the first month of Escrow Reporting, the gauge will display 0% in green. At the beginning of each subsequent month, the gauge will display 100% in red. As Escrow Contractual Payment events are successfully processed, the gauge will gradually transition to green, the percentage of loans with missing escrow contractual payments will decrease, and the Beginning Loan Count and Loans Reported fields will update accordingly.





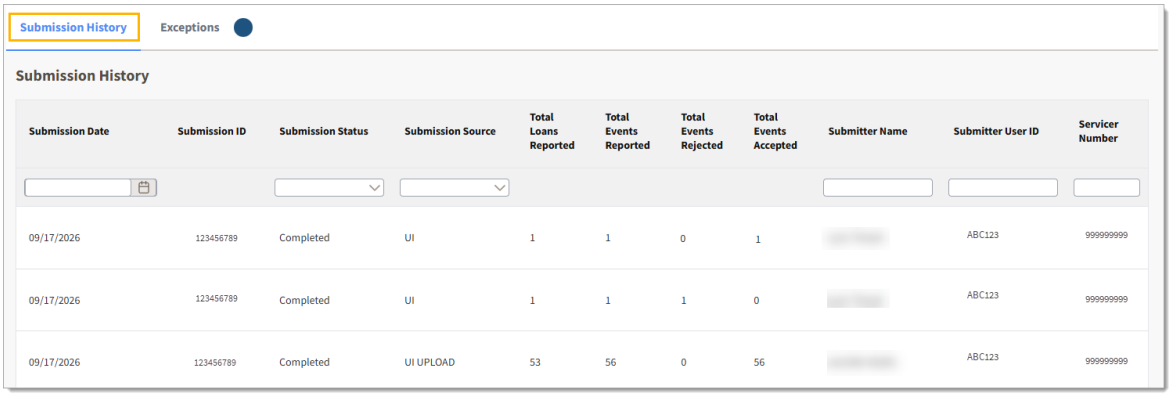


Submission History tab

The **Submission History** tab shows the status of all submitted escrow events via Business-to-Business (B2B), Application Programming Interface (API), and User Interface (UI) reporting channels.

1. Select the **Submission History** tab.
2. Review the results to ensure that all submitted loans/events are displayed.

During peak processing periods, event processing may take longer than usual. As a result, the submission status may temporarily display as **Processing** before updating to **Completed**. A **Processing** status indicates that the submission has been received, is queued, and will be processed in the order it was received.



Exceptions tab

The Exceptions tab shows the loans with rejected events.

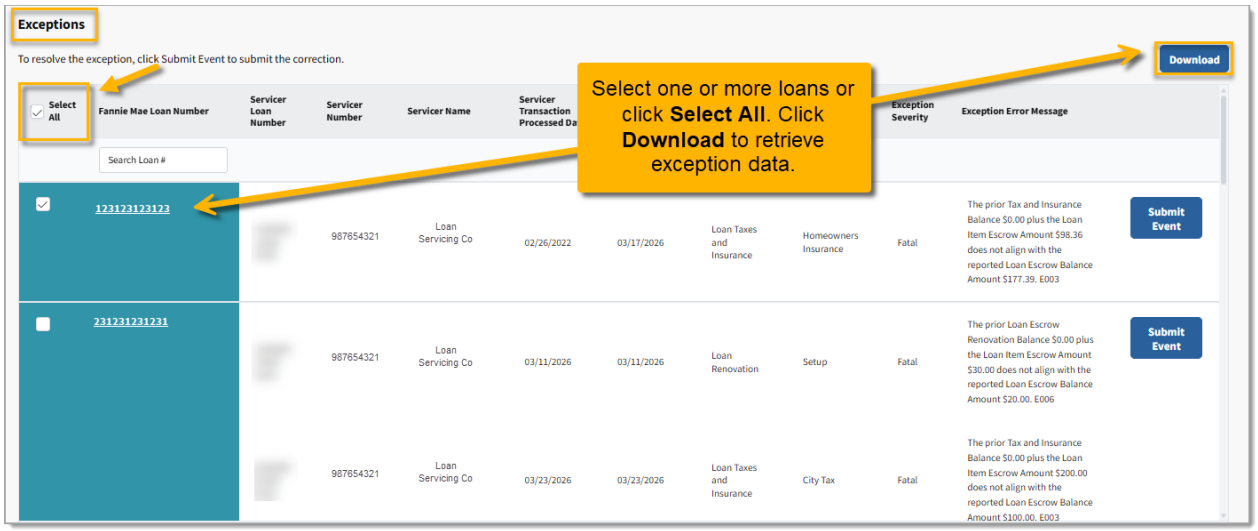
To resolve exceptions:

1. Select the loan with the exception.
2. Click **Submit Event**.
3. Enter the required data and submit a new event to resolve the exception.

To download exceptions:

1. **Select All** to download all loans or select individual loan numbers.
2. The download includes information displayed in the UI, including additional data attributes.

> ***Note:*** *The display defaults to the oldest exceptions first.*



Refer to the Servicing Changes Reference Guide for the list of Escrow Business Rules.

Submit a setup event

Escrow setup and transaction reporting examples

Prior to submitting the initial setup event and subsequent event reporting, take a few minutes to review the following resources for additional support and examples which are available on the servicing platform product page:

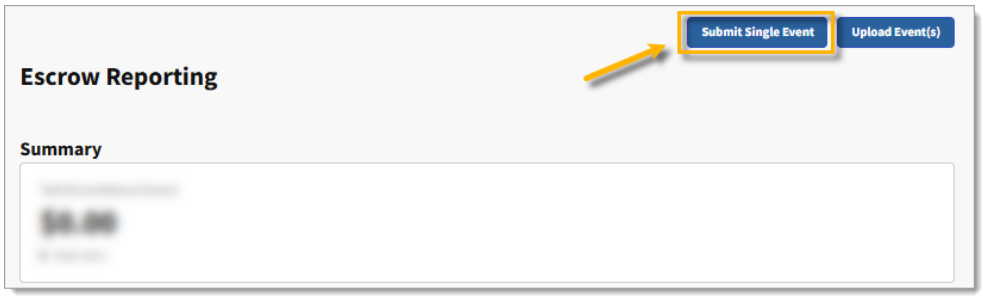
- Servicing Changes Reference Guide
- Escrow Reporting UI Upload Template and CSV Export Quick Reference Guide

Single setup event

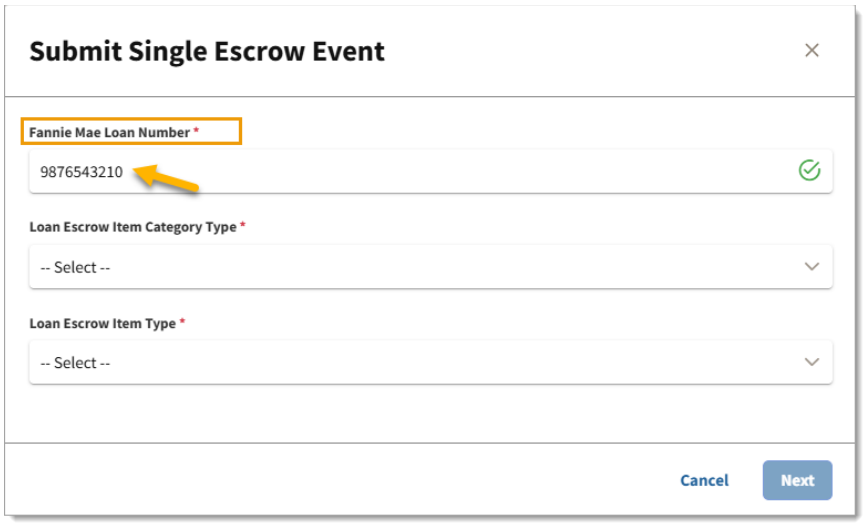
For seasoned or newly acquired loans, establish initial escrow balances with a setup event, then submit subsequent escrow activity through event-based reporting.

To submit a setup event in the Escrow Reporting application, follow the steps below:

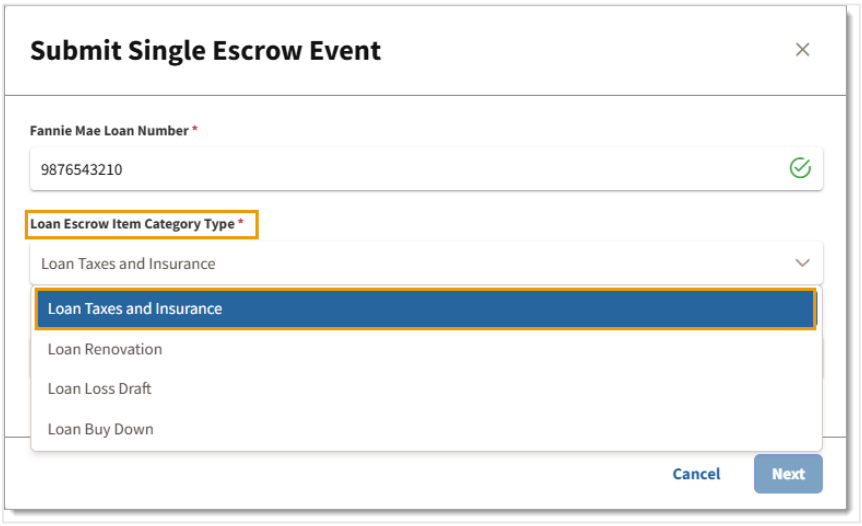
1. Select **Submit Single Event**.



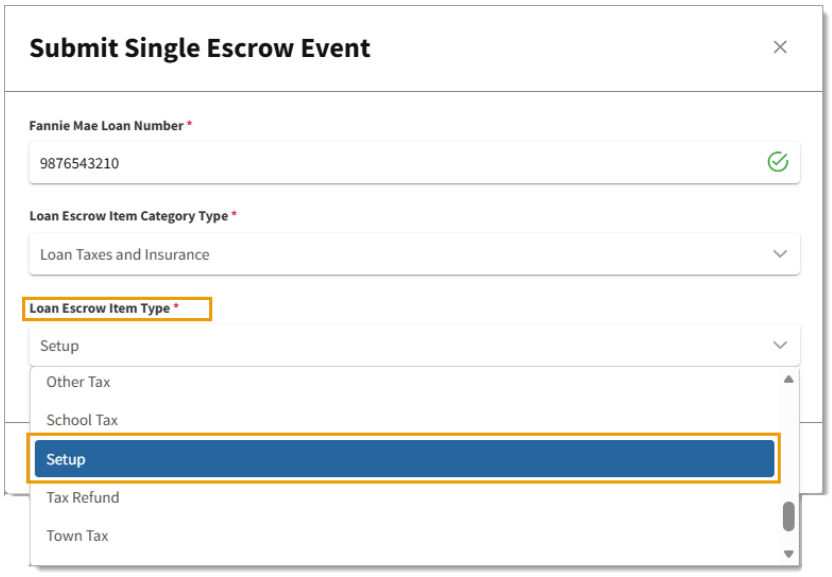
2. Enter the **Fannie Mae loan number**.



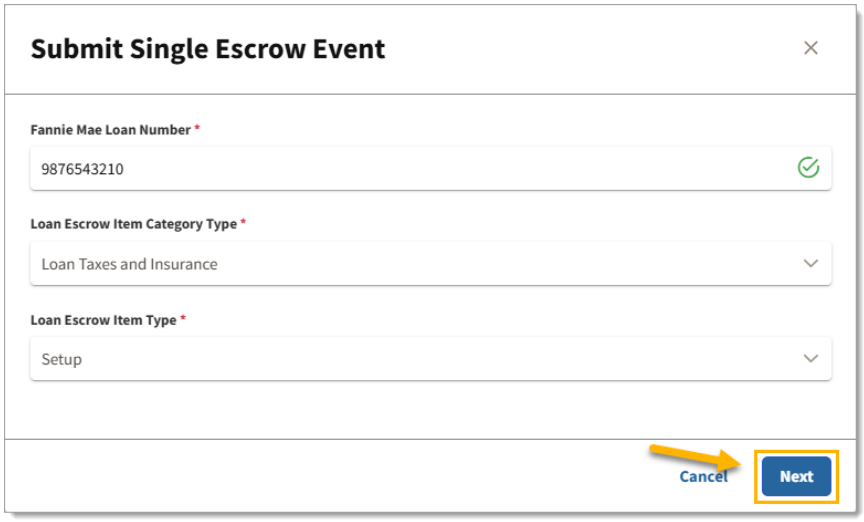
3. Select the applicable **Loan Escrow Item Category Type**.



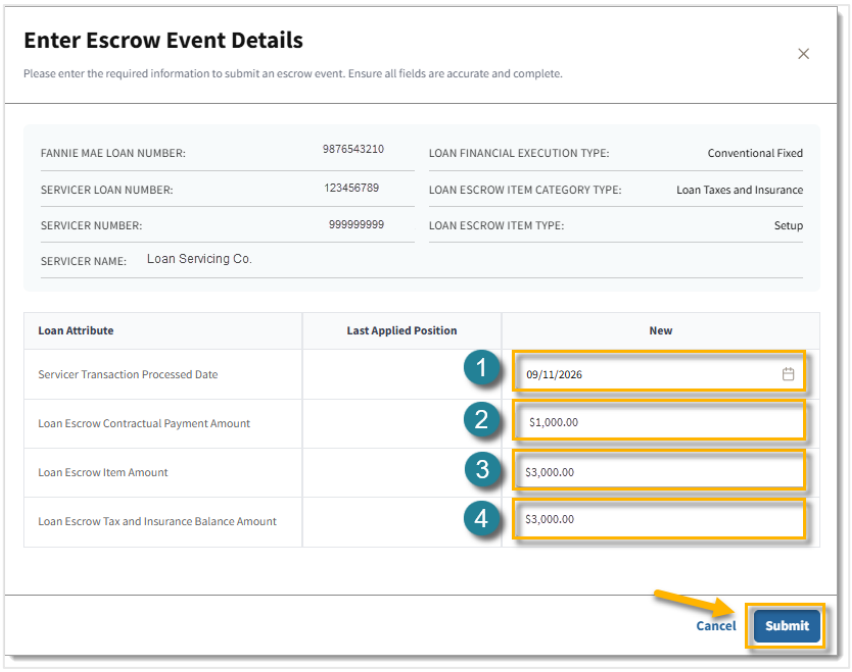
4. Select **Setup** as the **Loan Escrow Item Type**.



5. Select **Next**.

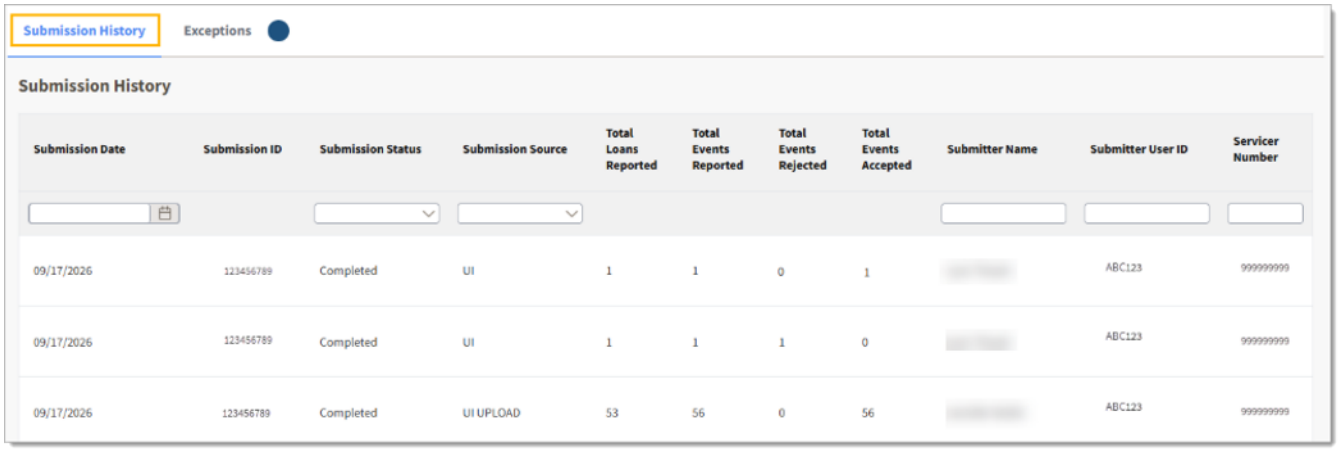


6. Complete the Escrow Event Details fields in order. Completing the fields out of order will trigger an error. Click **Submit** to proceed.



7. Click the **Refresh** icon in the top left corner of the browser toolbar to update Submission History to view the submission status.

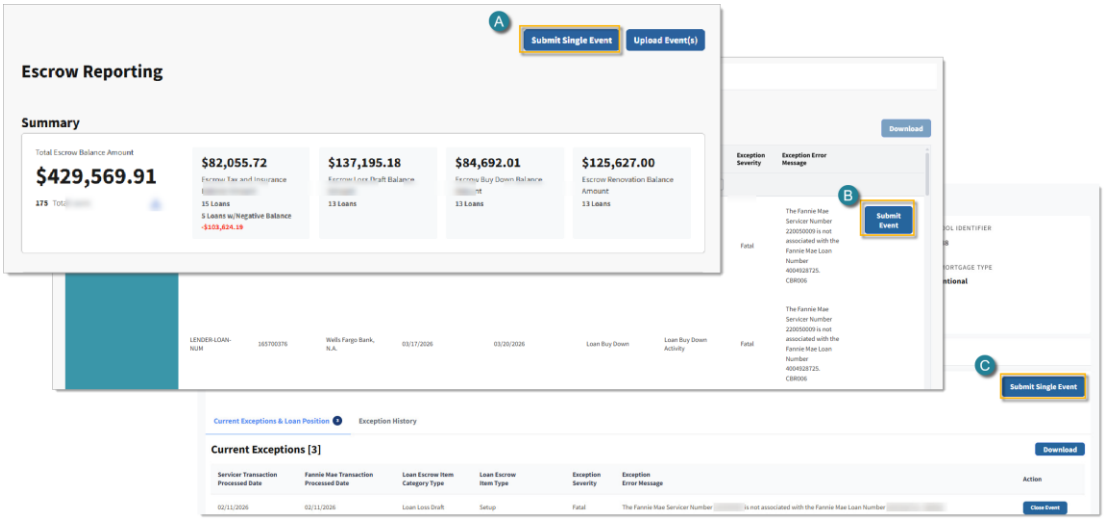




Report escrow events

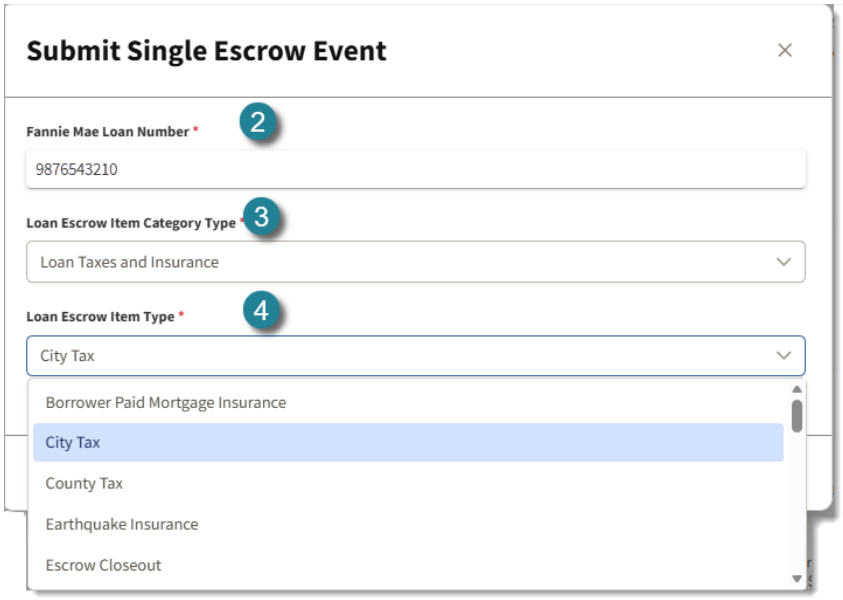
Users can submit a new escrow event or resolve a rejected event using the **Submit Single Event** option. This prompt can be found in three locations.

A. Top -right corner of the Escrow Reporting page
B. Exceptions tab, next to the related error messages
C. Loan Detail page, in the top-right corner



Submit Single Event

1. Click **Submit Single Event** using any of the three options shown above.
2. Enter the **Fannie Mae Loan Number.**
3. Select a **Loan Escrow Item Category Type** from the drop-down menu.
4. Select a **Loan Escrow Item Type** from the drop-down menu.



5. Click **Next** to proceed

OR

6. Click **Cancel** to close the pop-up window.

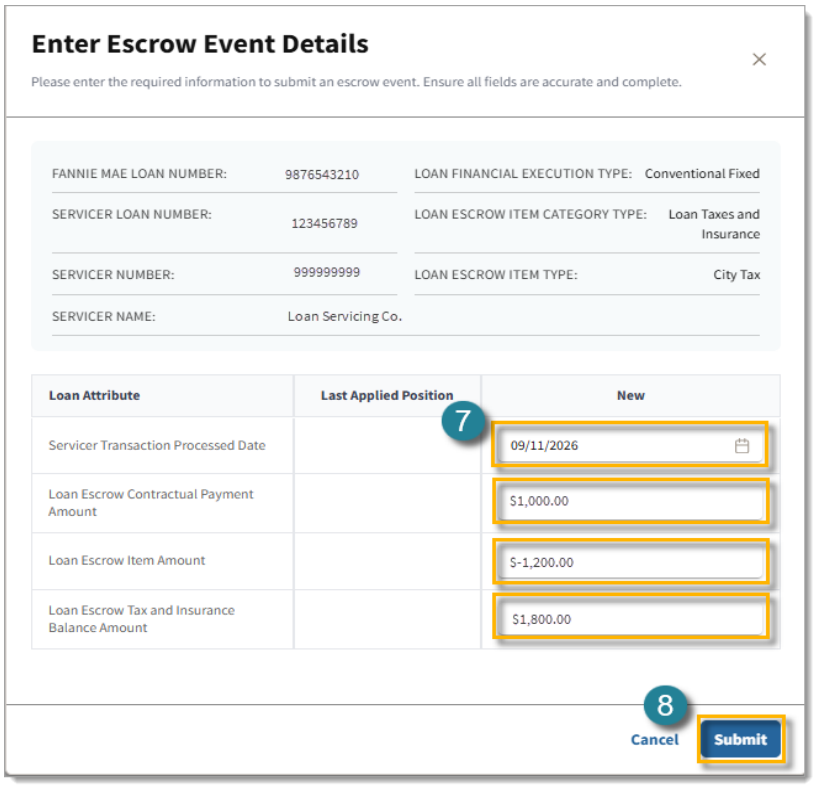


The **Enter Escrow Event Details** screen will open. Required fields will display based on the **Event Category** and **Item Type** selected in the previous pop-up window.

7. Complete all the required fields.

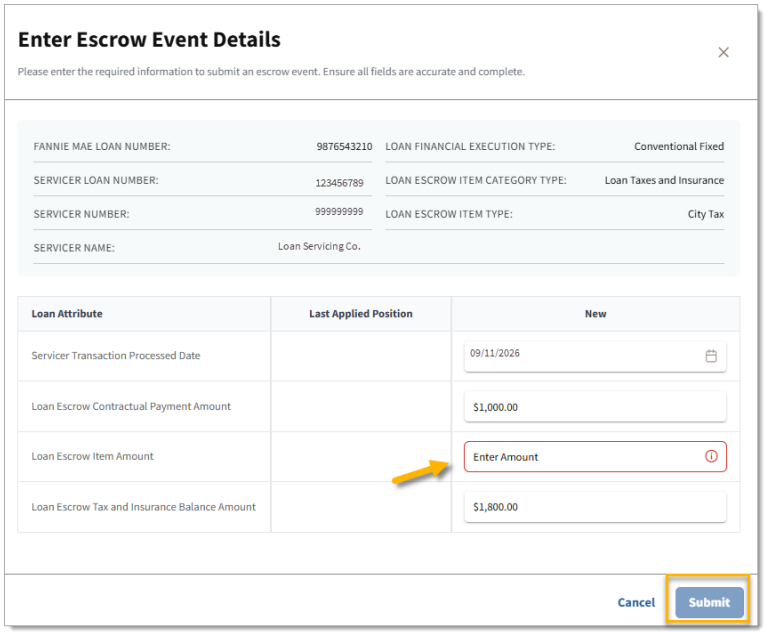
Note: *The Disbursements from the escrow accounts are negative ($-1,200).*

8. Click **Submit** to proceed or click **Cancel** to close the pop-up window.



Note: *Loan Escrow Balance Amount must be a numeric value. Zero and positive values are allowed for all escrow event categories. Negative balances are allowed only for the following event categories: Loan Taxes and Insurance, Loan Loss Draft and Loan Buy Down.*

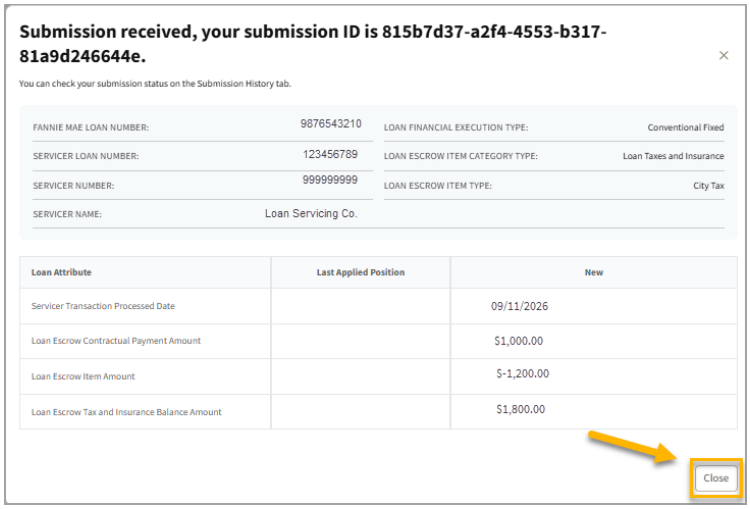
If any required fields are left blank, the system will display an error highlighting the fields that require attention, along with a brief explanation of the issue.



9. When all errors have been corrected, click **Submit** to proceed, or click **Cancel** to close the submission without saving.

   The servicing platform will display a submission confirmation with a Submission ID.

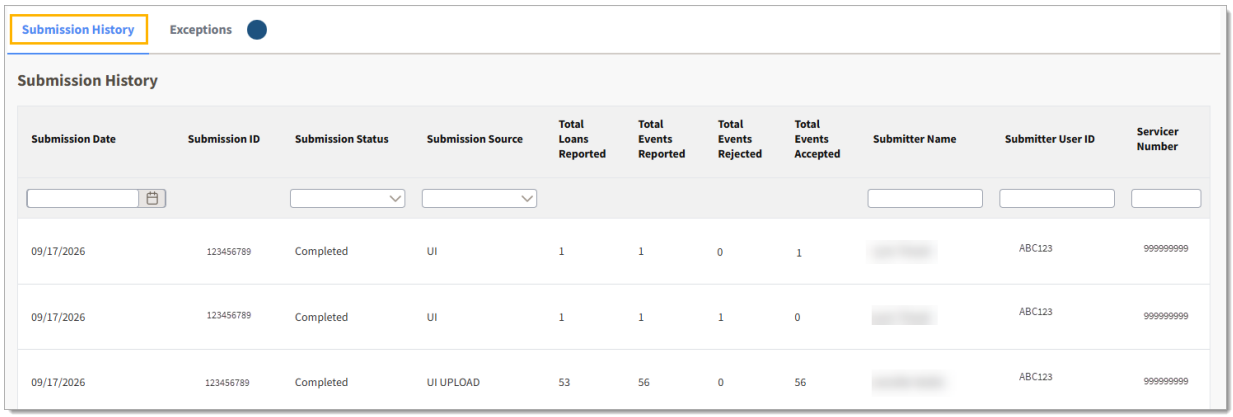
10. Click **Close**.



11. Click the **Refresh** icon in the browser toolbar to view the Submission status.

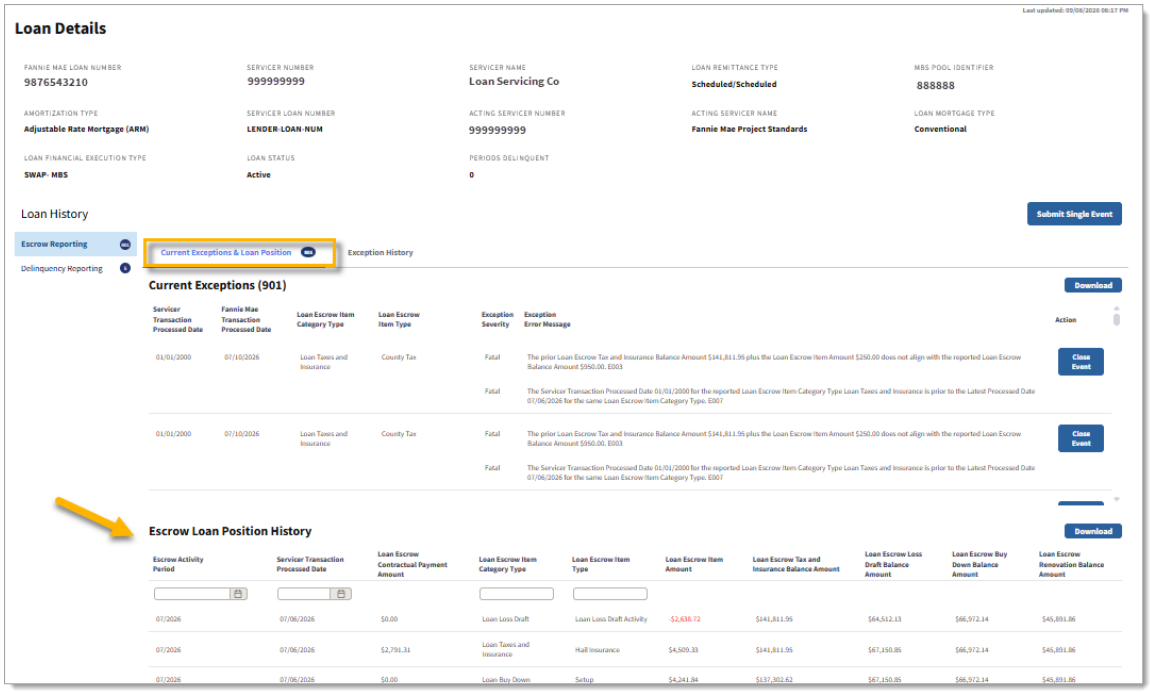


The status of the submitted event will be displayed in the **Submission History** tab.



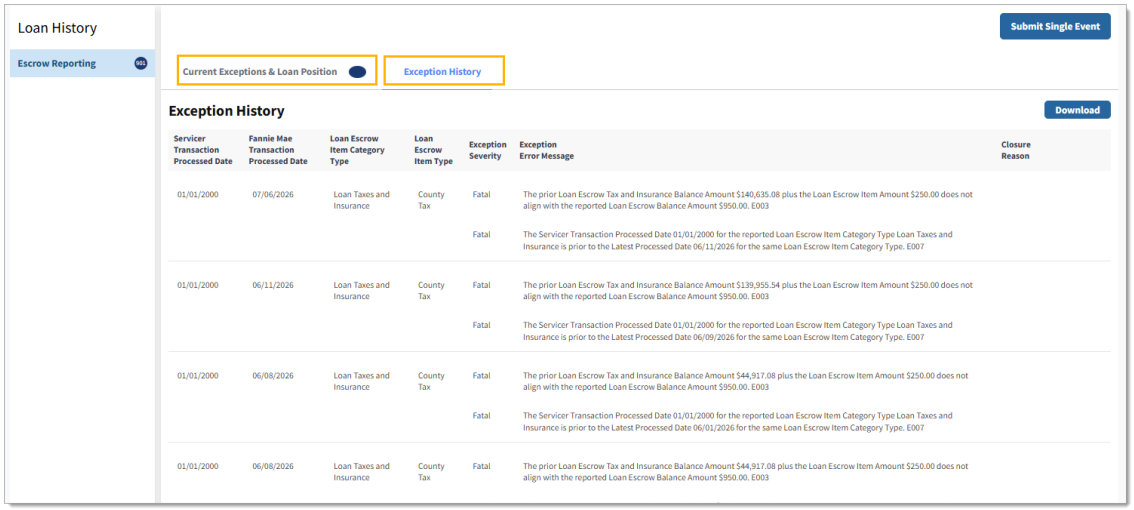
If the event is accepted, the updated escrow balances will be reflected in the **Escrow Loan Position History**.

1. Click the **Current Exceptions & Loan Position** tab. All current exceptions for the loan will be displayed.
2. Scroll down to **Escrow Loan Position History** to view the Escrow Loan History and the latest escrow balance.



If the event is rejected, rejection details will be displayed in the **Exception** tab on the **Summary** page **OR** in the **Current Exceptions & Loan Position** tab on the **Loan Details** page.

- Click **Current Exceptions & Loan Position OR**
- If an event is rejected and the exception is subsequently cleared or manually closed, the exception details will be available in the **Exception History** Tab.



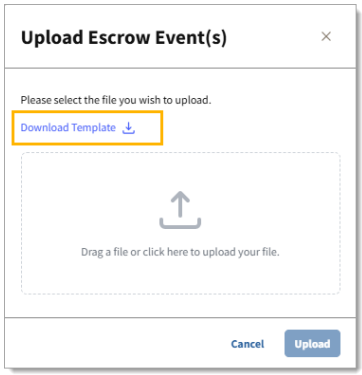
Upload Event(s)

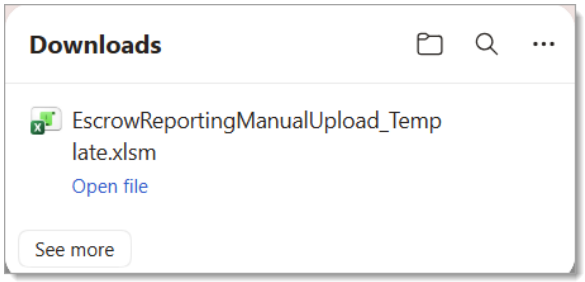
1. Click **Upload Event(s)** to access the bulk upload feature.



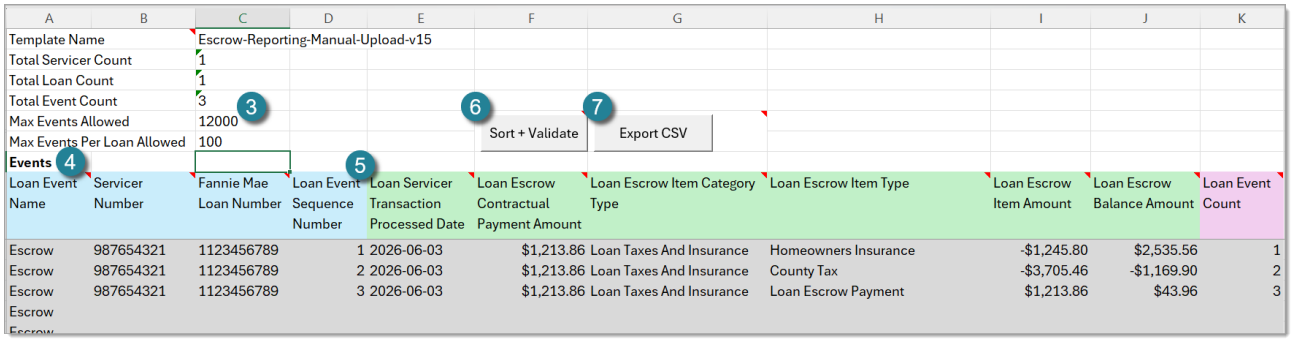
2. Click **Download Template** to retrieve the escrow event template. A pop-up box will notify the user that the template was sent to the Downloads folder.

> ***Note:*** *Template requires Visual Basis for Applications (VBA) macros to function and is supported only in Microsoft Excel for Windows or macOS. If you are having any challenges with the template, see the "Getting Started with the Template" section of the Escrow Reporting UI Upload Template and CSV Export Quick Reference Guide to enable the macros.*





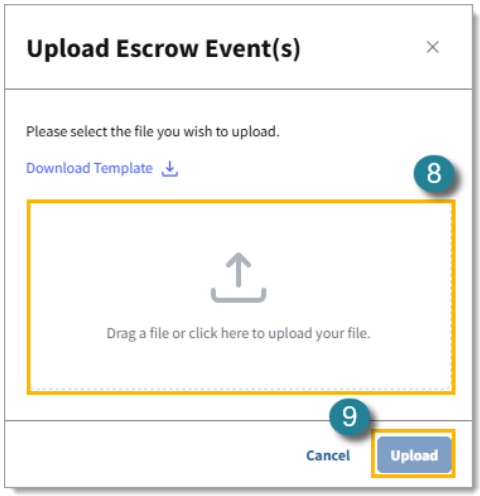
3. Populate the template with all required event information. The template will allow the user to submit up to 12,000 events at a time.
4. Select the **Loan Event Name**, **Loan Escrow Item Category Type**, and **Loan Escrow Item Type** from the available drop-down selections.
5. Each event must contain a sequence number that defines the processing order of transactions within a loan (lowest to highest). Ensure the sequence numbers are unique (but not necessarily consecutive) for each loan in the file and delete all empty rows prior to running the validation process.
6. Click **Sort + Validate** to validate the file and resolve any errors.
7. Click **Export CSV** to convert the template to a .csv format. (File size cannot exceed 5MB.)



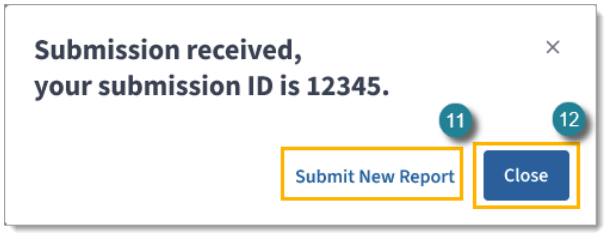
8. Click the upload area to select a file or drag and drop the .csv file into the upload area.

Note: *The file must use the lowercase .csv extension.*

9. Click **Upload**.



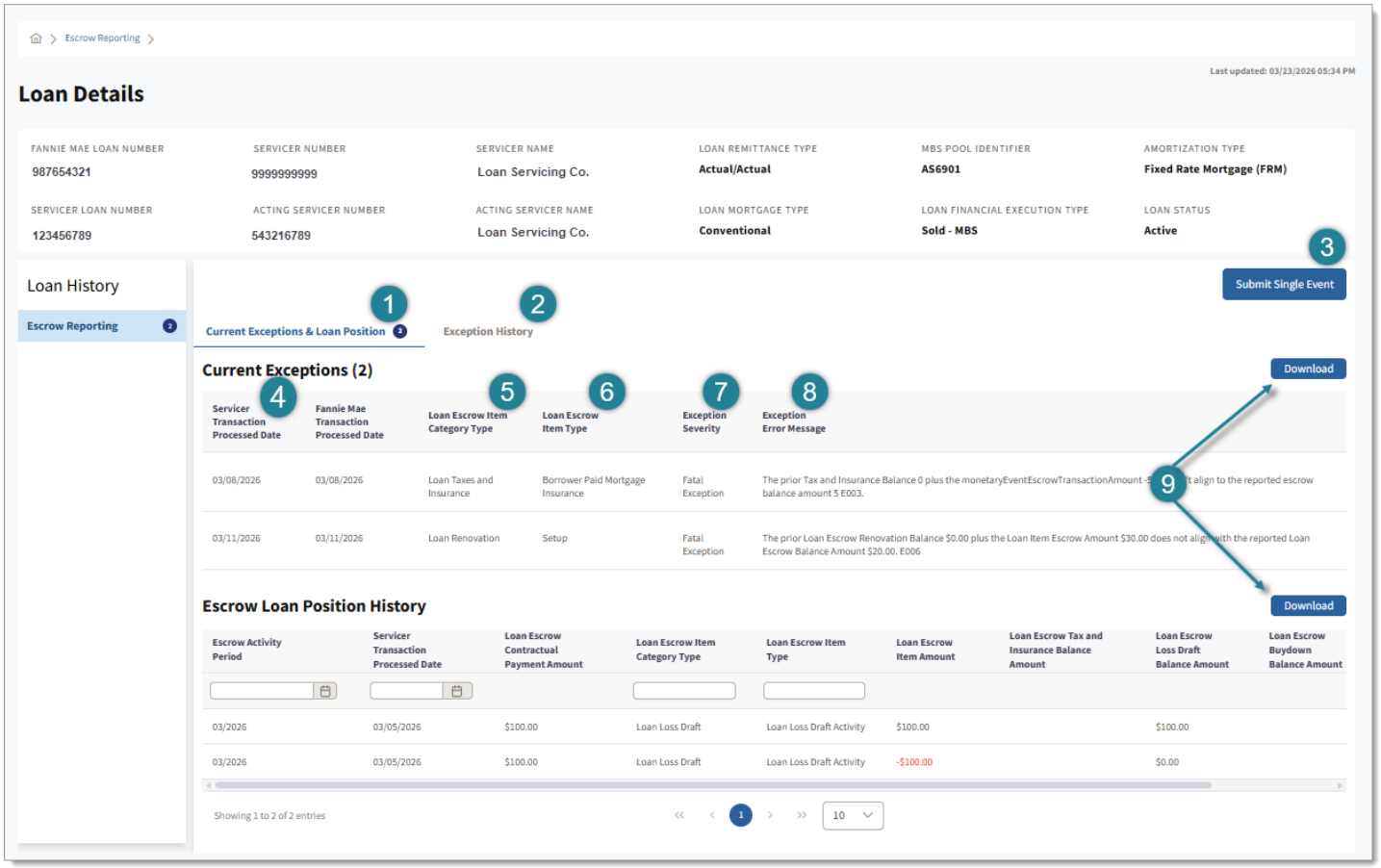
10. The servicing platform will provide confirmation with a Submission ID.
11. Click **Submit New Report** to continue with an additional upload, **OR**
12. Click **Close** to close the pop-up.



Loan Details overview

Navigation

	Field name	Description
1	Current Exceptions & Loan Position	Current exception displays open Escrow Exceptions, and Loan Position History displays all Accepted Events across all escrow categories and item types.
2	Exception History	Historical record of all resolved escrow exceptions for the loan.
3	Submit Single Event	Opens the workflow to submit a new escrow event for the selected loan.
4	Servicer Transaction Processed Date	The date when a servicing transaction was recorded on the mortgage loan.
5	Loan Escrow Item Category Type	Type of escrow activity reported (for example, Taxes and Insurance, Buydown, Loss Draft, Renovation).
6	Loan Escrow Item Type	Identifies specific escrow item type within the selected event category.
7	Exception Severity	Indicates the severity of the exception.
8	Exception Error Message	Displays the reason the escrow event was rejected.
9	Download	Downloads are available for Current Exception(s), Escrow Loan Position History, and Exception History.



Current Exceptions & Loan Position History

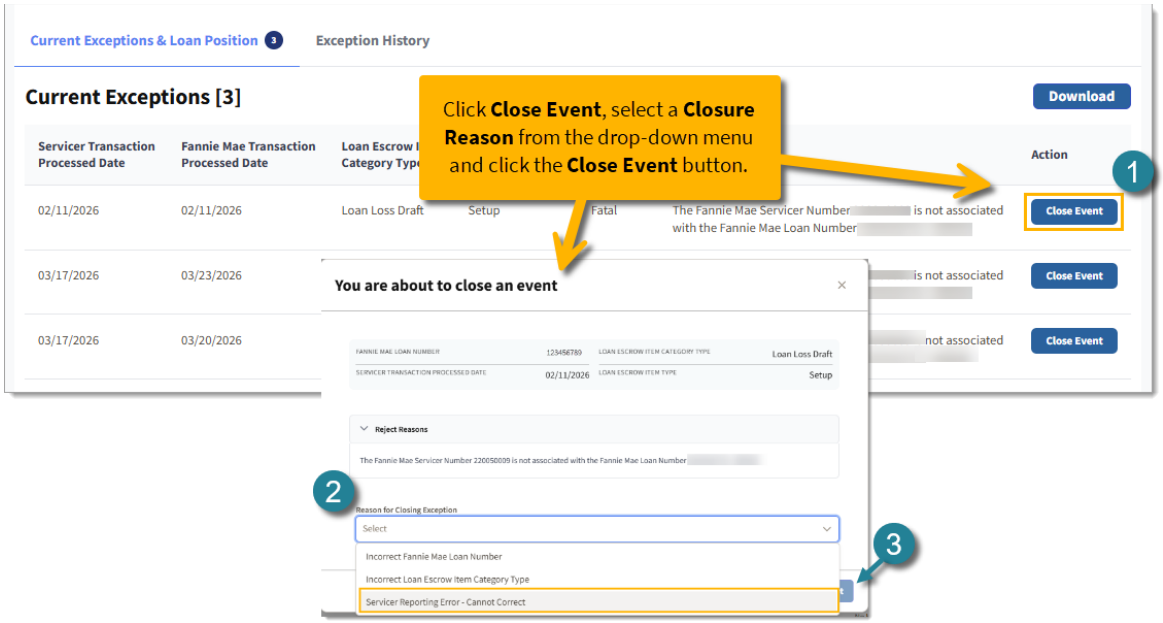
The Current Exceptions & Loan Position tab contains two sections. The first section displays rejected escrow events. The second section, Escrow Loan Position History displays accepted escrow events and reflects the latest accepted escrow balances across all escrow categories and item types.

To resolve exceptions:

1. Click **Submit Event**.
2. Enter the required data and submit a new event to resolve the exception.

To manually close an event:

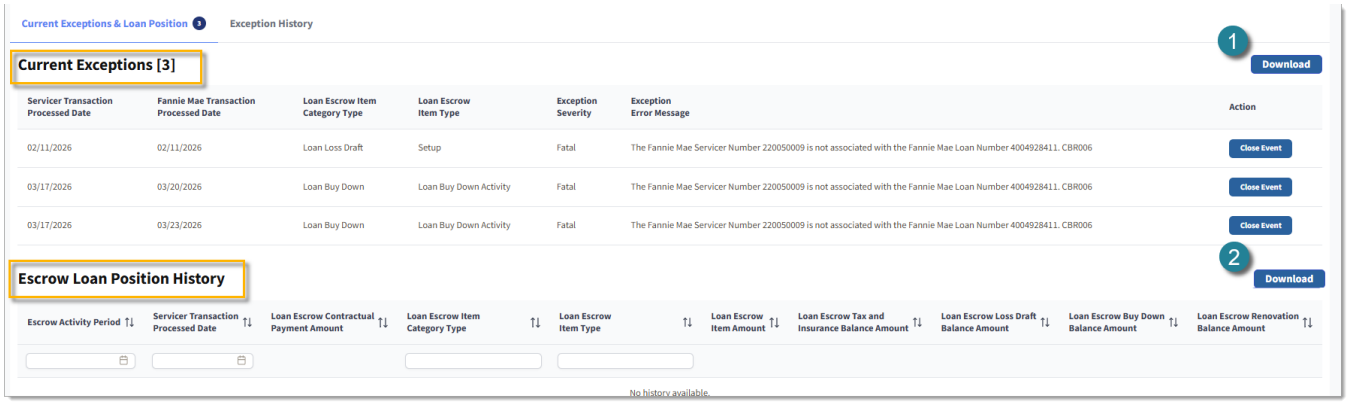
1. Click **Close Event** on the right side of the page for the selected exception
2. Select the **Closure Reason** from the drop-down menu
3. Click **Close Event**



To download **Current Exceptions & Loan Position**:

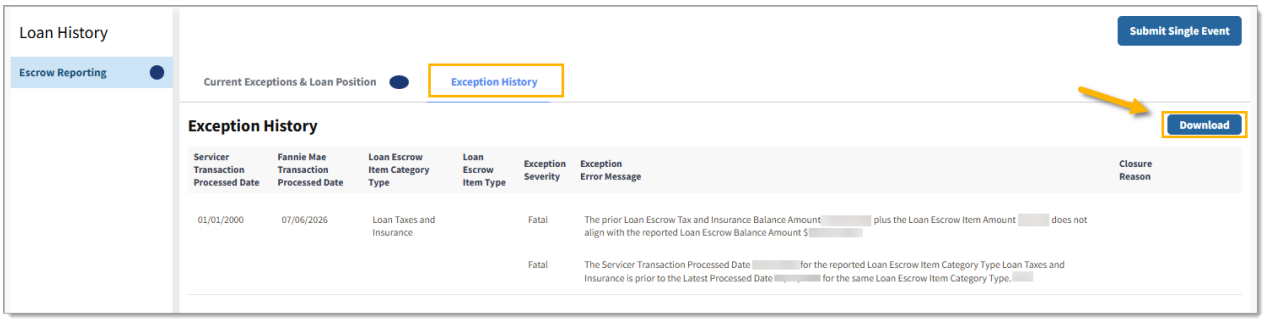
1. Select **Download** to download Current Exceptions
2. Select **Download** to download Loan Position History

> ***Note:*** *The download includes information displayed in the UI, including additional data attributes.*



Exception History

Exception History displays exceptions that were resolved. Click **Download** to download Exception History and additional attributes.



Attestation

Fannie Mae requires servicers to complete a monthly UI attestation for each 9-digit servicer number. The attestation verifies the accuracy and completeness of the reported ending escrow balance, loan count, and aggregate escrow contractual payment amount.

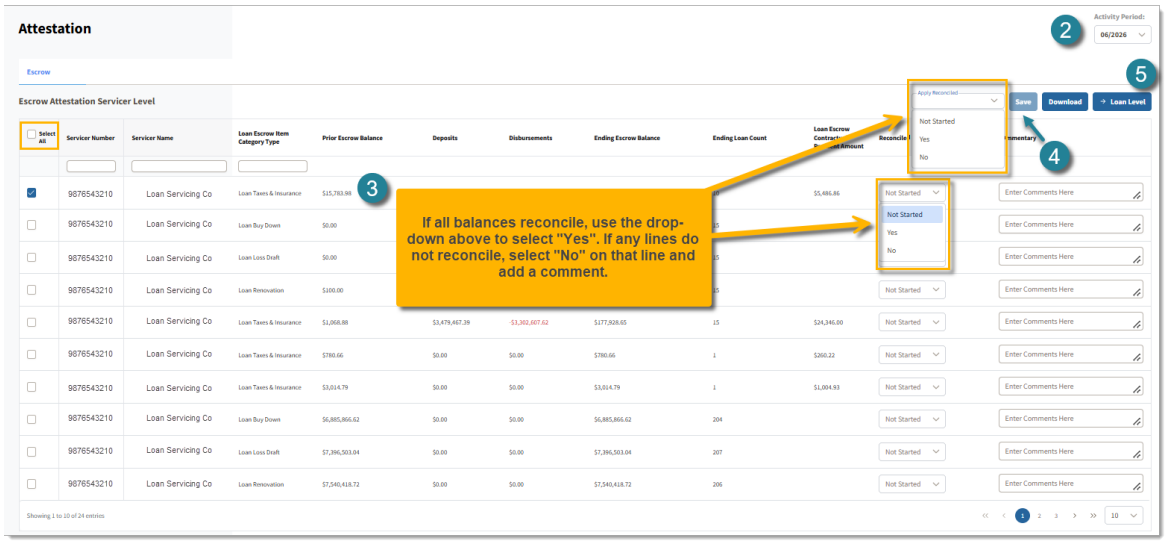
Click **Select All** to process events in bulk.

1. Select **Attestation** from the Services menu in the left-hand navigation panel.
2. The system automatically defaults to the available attestation **Activity Period**. Use the dropdown menu to view and download the prior attestation history.
3. Make an attestation selection.
   - If all balances, aggregate escrow contractual payment amount and loan counts reconcile with Fannie Mae records, the servicer must select **Yes** to attest.
   - If any balances or the **Aggregate Escrow Contractual Payment Amount** or loan counts do not reconcile, the servicer must select **No** and provide commentary with the loan number(s) for each unreconciled **Servicer Number**.

> ***Note:*** *The download includes information displayed in the UI, including additional data attributes.*

4. Click **Save**.
5. Switch between the **Loan Level** and **Servicer Level** views to review attestation information at the appropriate level of detail.
   - The **Loan Level** view provides a loan-level breakdown across all four escrow category types.
   - The **Servicer Level** view displays totals for all 9-digit servicer numbers. Users can **Select All** to download or select an individual 9-digit Servicer Number(s) at the **Loan Level** and **Servicer Level**.

The download includes information displayed in the UI, including additional data attributes.



The attestation window will be opened on business day 3 (BD 3) and will close at the end of business day 2 (BD2) of the following month.

Example: The March 2026 activity period **is open** from April 3 through May 4.

Delinquency Reporting

Overview

Delinquency Reporting replaces monthly status reporting with near-real-time, event-driven submissions through a centralized platform using API, B2B, and UI channels. Events are reported to Fannie Mae the day they occur, but no later than 3:00 a.m. Eastern Time the next business day. Standardized events and a multidimensional data model provide clearer visibility into outreach, loss mitigation, and collections. Expanded loan-status coverage aligned with Servicing Management Default Underwriter™ (SMDU), Default Reporting Application (DRA), and Property 360™ reduces duplicate reporting, flat-file reliance, and manual reconciliation while improving data validation and transparency.

Testing environment access

All acting servicers are encouraged to participate in testing. Servicers designated for required testing were notified by Fannie Mae by August 2026. To obtain access to the Fannie Mae Servicing Platform Delinquency Reporting UI test environment:

- Acting servicers must submit the Delinquency Reporting UI CIT Environment access request form; users with existing Escrow Reporting test IDs may reuse their credentials but are still required to submit the form.
- Fannie Mae will provision access and each testing participants their User ID and inform them when their access to the Delinquency Reporting testing environment has been granted.
- Once provisioned, you can access the test environment here.

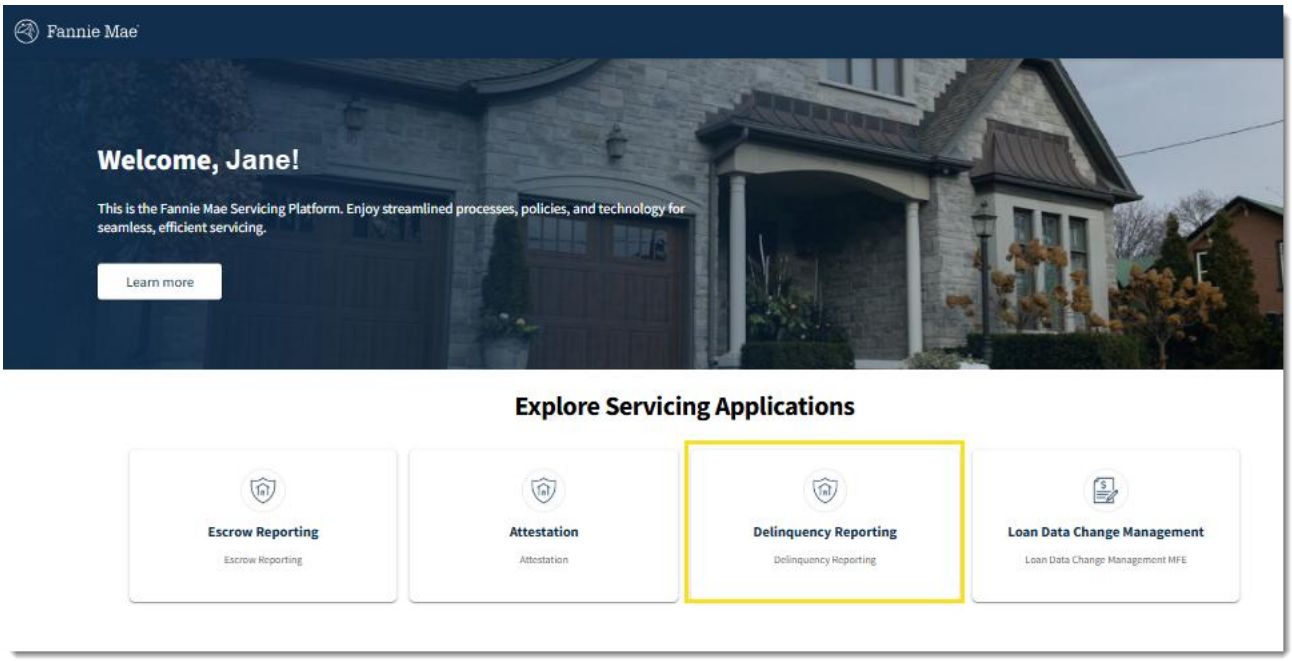
Access the production environment

Details will be provided closer to the March 2027 production go-live date.

Open Delinquency Reporting (Testing Environment)

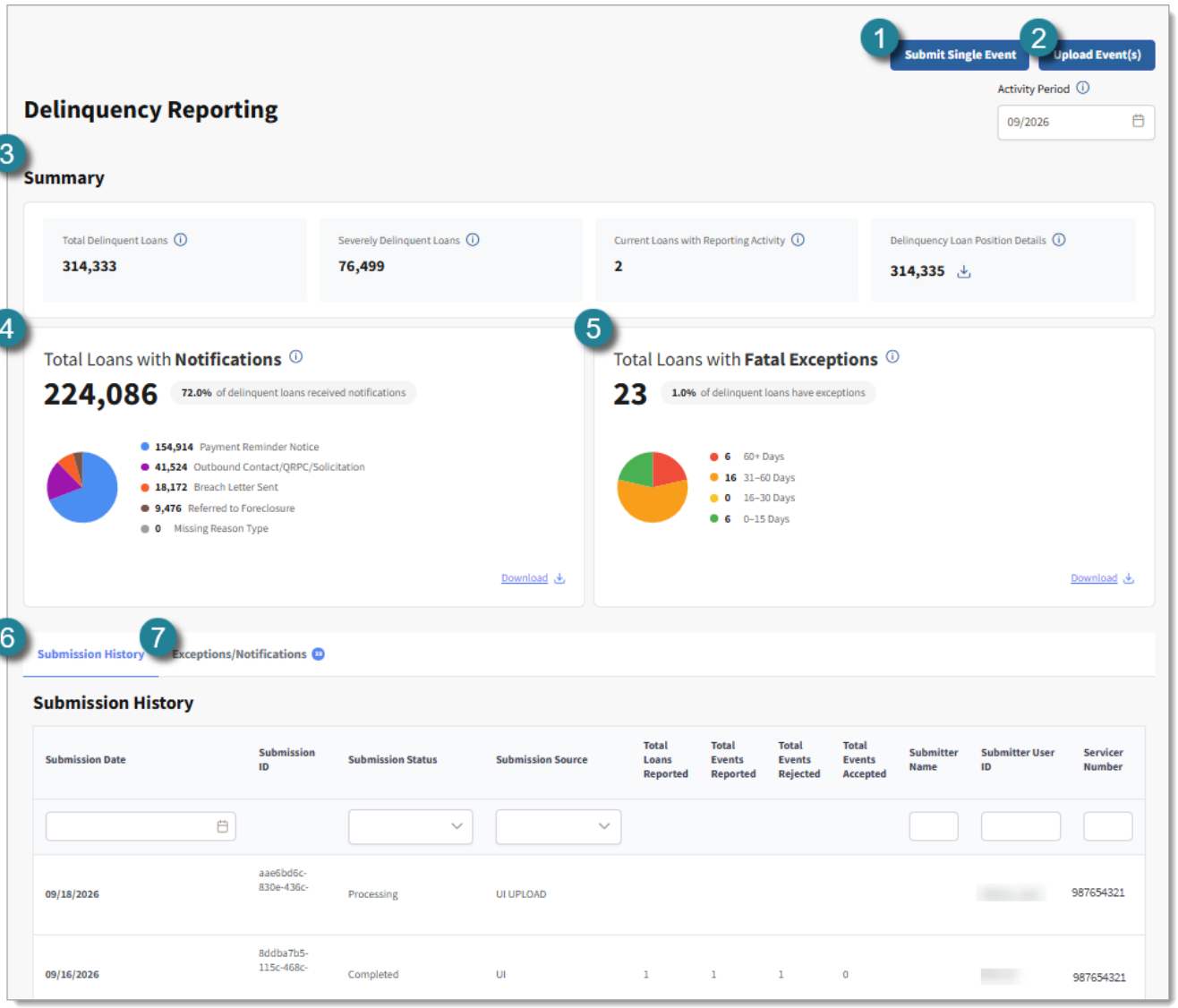
Log in to Servicing Platform Test Environment , and then follow the steps below to open the Delinquency application.

Select **Delinquency Reporting** from the application tiles on the Welcome page to navigate to the Delinquency Reporting page.



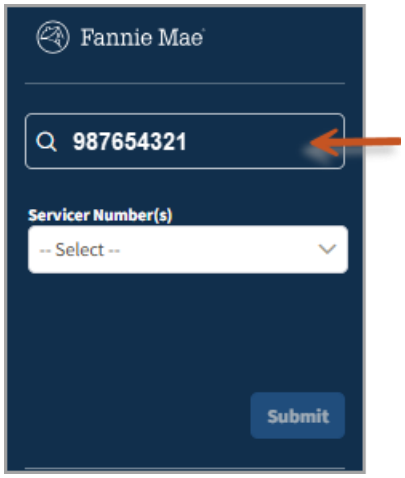
Navigation

	Field Name	Description
1	Submit Single Event	Submits one delinquency event for a single loan.
2	Upload Event(s)	Uploads multiple delinquency events in one file.
3	Summary	Summarizes total delinquent loans, delinquency activity, notifications, and fatal exceptions.
4	Total Loans with Notifications	Shows the number of loans with notifications requiring review.
5	Total Loans with Fatal Exceptions	Shows the number of loans with fatal exceptions requiring correction and resubmission.
6	Submission History	Shows submission status, source, and results.
7	Exceptions/Notifications	Provides loan-level exception and notification details.



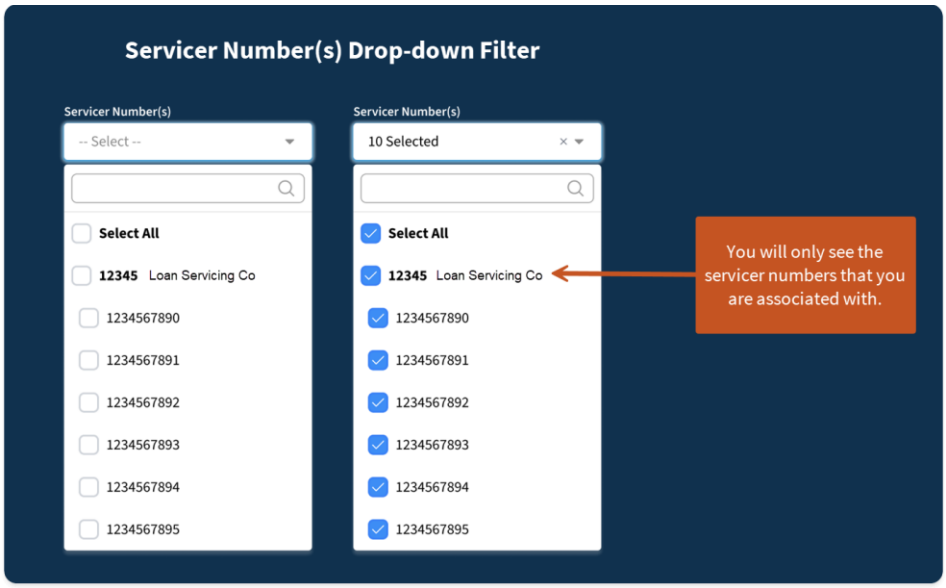
Fannie Mae Loan Search

Use the Search field to enter the 10-digit Fannie Mae or Servicer loan number to view loan details. Click **Submit** or press **Enter** to proceed.



Servicer Number(s)

Use the **Servicer Number(s)** drop-down to **Select All** 5-digit or 9-digit Servicer Numbers or select individual 5-digit or 9-digit Servicer Number(s).

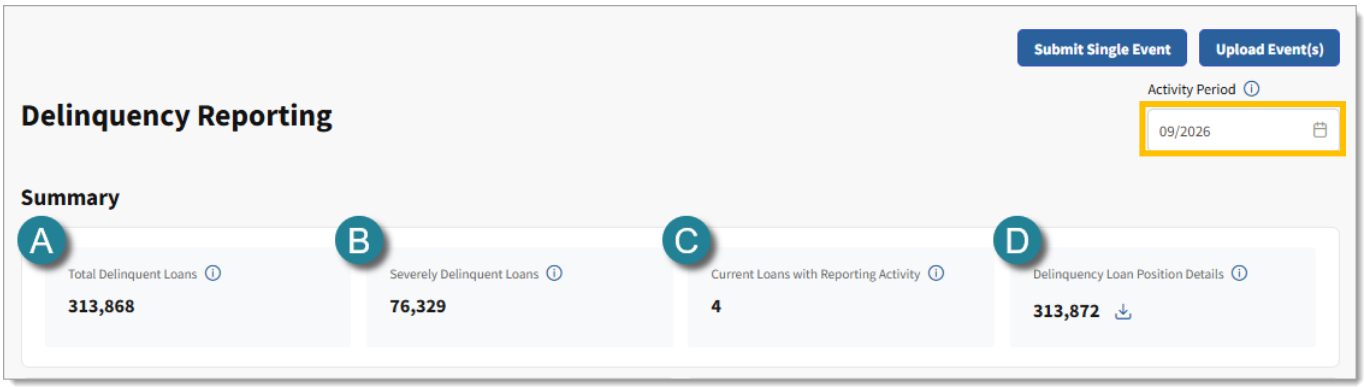


Summary Overview

The **Delinquency Reporting Summary** provides the latest summary of loan-count and loan-level information for selected "Activity Period".

> ***Note:*** *The summary counts and loan-level information in the downloads will reflect the Activity Period selected. For prior Activity Periods, the information will be as of end of the period.*

	Field Name	Description
A	**Total Delinquent Loans**	Displays the number of unique loans currently reported as delinquent for the selected servicer number(s).
B	**Severely Delinquent Loans**	Displays the number of unique loans that have reached the severely delinquent threshold (3 or more periods delinquent) for the selected servicer number(s).
C	**Current Loans with Reporting Activity**	Displays the number of unique current loans with delinquency events or servicer actions reported during the selected activity period.
D	**Delinquency Loan Position Details**	Provides loan-level details for the delinquency position, including the reported status, events, reason types, servicer actions, and related activity.



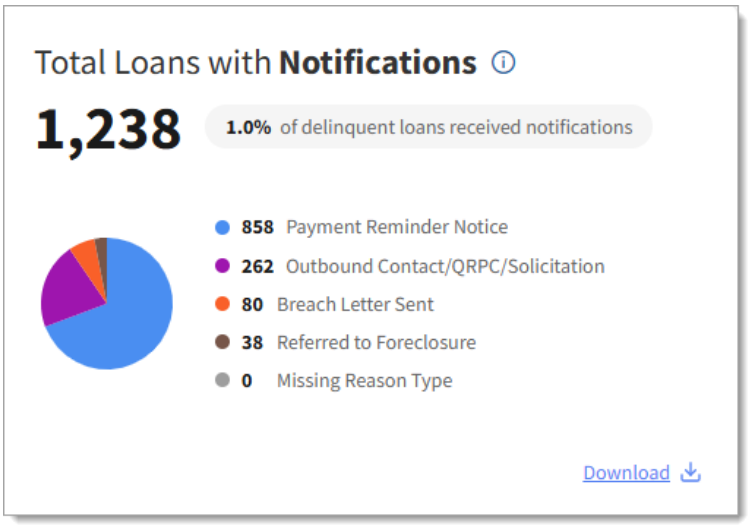
Refer to the Loan Management: Servicing Events and Data Requirements for the complete Delinquency Reporting data requirements.

Click the *Delinquency Loan Position Details* **Download** icon to download "Delinquency Snapshot" information for all the loans for the selected servicer number(s). Loan-level information includes the latest reported delinquency status, action, and reason and latest SMDU and DRA status for that loan.

Hover over the **Information** icon next to a summary category to display a brief description of the category and the criteria used to determine the corresponding loan count as well as how Fannie Mae determines how a loan is delinquent.

Total Loans with Notifications

The **Total Loans with Notifications** section displays both the total loan count with one or more Notifications for the selected servicer number(s), broken down by notification type. Notifications are informational only and indicate a potential delay in expected action or missed reporting within the expected timeframe.



To see loan-level information:

- Click the **Download** icon to download the list of loans with notifications, including the associated loan-level information (see below).

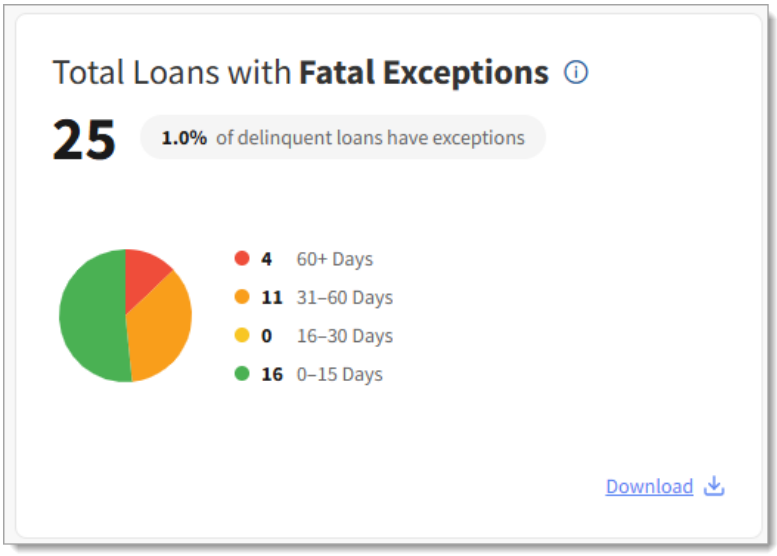
Master Servicer Name	Acting Servicer Number	Acting Servicer Name	Activity Period	Periods Delinquent	Fannie Mae Transaction Processed Date	Event Status	Exception Severity	Days Open	Notification Rule ID	Notification Message	Servicer Transaction Processed Date
Lender A	111111111	Lender B	202609	3	9/17/2026		Notification	14	DR010	The expected Servicer Action Type of Breach Letter Sent has not been received DR010	
Lender A	111111111	Lender B	202609	3	9/17/2026		Notification	14	DR010	The expected Servicer Action Type of Breach Letter Sent has not been received DR010	
Lender A	111111111	Lender B	202609	1	9/17/2026		Notification	14	DR008	The expected Servicer Action Type of Payment Reminder Notice has not been received DR008	
Lender A	111111111	Lender B	202609	5	9/17/2026		Notification	14	DR011	The expected Servicer Action Type of Referred to Foreclosure has not been received DR011	
Lender A	111111111	Lender B	202609	3	9/17/2026		Notification	14	DR010	The expected Servicer Action Type of Breach Letter Sent has not been received DR010	
Lender A	111111111	Lender B	202609	1	9/17/2026		Notification	14	DR008	The expected Servicer Action Type of Payment Reminder Notice has not been received DR008	
Lender A	111111111	Lender B	202609	1	9/17/2026		Notification	14	DR008	The expected Servicer Action Type of Payment Reminder Notice has not been received DR008	

- Click the **Exceptions/Notifications** tab and filter on “Notifications” for Exception Severity.

See the Servicing Changes Reference Guide Delinquency Reporting / Business Rules section for the full list of Notifications.

Total Loans with Fatal Exceptions

The **Total Loans with Fatal Exceptions** section displays the count of unique loans with one or more fatal exceptions for the selected servicer number(s), as well as the number of exceptions in each aging category. Fatal exceptions identify missing, invalid, or inconsistent delinquency data that prevent an event from being accepted and require correction and resubmission.



To see loan-level information:

- Click the **Download** icon to download the list of loans with fatal exceptions, including the associated loan-level information (see below).

FNM Loan Number	Servicer Loan Identifier	Master Servicer Number	Master Servicer Name	Acting Servicer Number	Acting Servicer Name	Activity Period	Periods Delinquent	Fannie Mae Transaction Processed Date	Event Status	Exception Severity	Days Open	Exception Rule ID	Exception Message	Servicer Transaction Processed Date
111111111	LENDER-LOAN-NUM	1111119999	Servicer A	2.2E+09	Servicer B	202609	1	9/22/2026	Rejected	Fatal	9	DR002	Property, Borrower Declined to Provide a Reason, Borrower Error, Casualty Loss]. Borrower Declined to Provide a Reason cannot be reported with any other Loan Delinquency Reason Types. DR002.	9/22/2026
111111111	LENDER-LOAN-NUM	1111119999	Servicer A	2.2E+09	Servicer B	202609	1	9/22/2026	Rejected	Fatal	9	DR004	These Loan Delinquency Status Types were provided: [Litigation, Military Indulgence, Pre-File Mediation/ Mediation]. Military Indulgence cannot be reported in the same event as Veterans Affairs-Refund, Partial Reinstatement, Drug Seizure, Contested or Litigated Foreclosure, Pre-File Mediation/ Mediation, Title Issue in Progress, Bankruptcy Chapter 7 - Asset Case, Probate, Chapter 12 Bankruptcy, Chapter 7 Bankruptcy, Chapter 11 Bankruptcy, Chapter 13 Bankruptcy, Chapter 13 Bankruptcy Plan - Post-Petition Period Utilize, Military Indulgence Completed, Bankruptcy - Property Surrendered. DR004.	9/22/2026

- Click the **Exceptions/Notifications** tab and filter on “Fatal” for Exception Severity.

See the Servicing Changes Reference Guide Delinquency Reporting / Business Rules section for the full list of Fatal Exceptions.

Submit Single Event

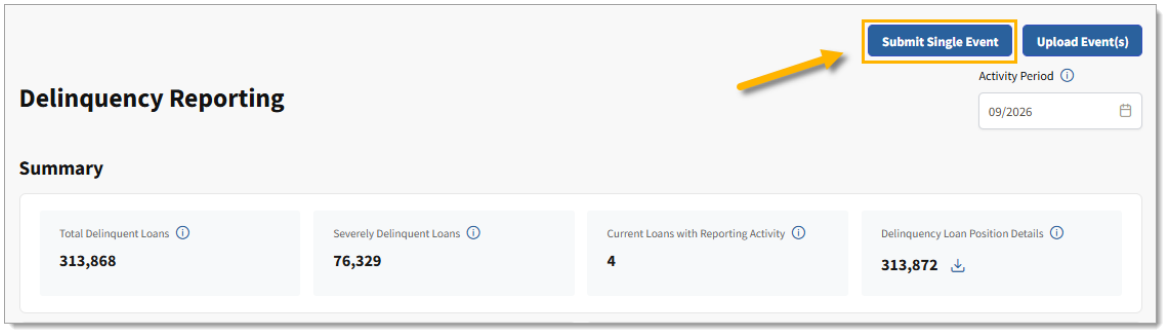
Use **Submit Single Event** to report a delinquency event for a single loan (or clear a fatal exception).

Important: You are not required to select all three delinquency reporting categories when submitting an event. Select only the category or categories applicable to the activity being reported.

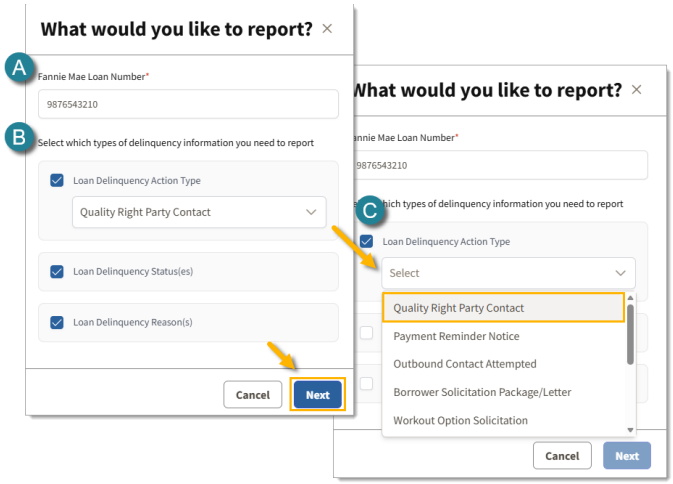
Depending on the activity being reported, you may submit events including but not limited to:

- One *Loan Delinquency Servicer Action Type*, ***OR***
- One *Loan Delinquency Status Type*, ***OR***
- One *Loan Delinquency Reason Type*, ***OR***
- One *Loan Delinquency Servicer Action Type* with up to five associated *Delinquency Status Types* and/or *Delinquency Reason Types*, ***OR***
- Up to five *Delinquency Status Types* and/or *Delinquency Reason Types* without a Loan Delinquency Servicer Action Type.

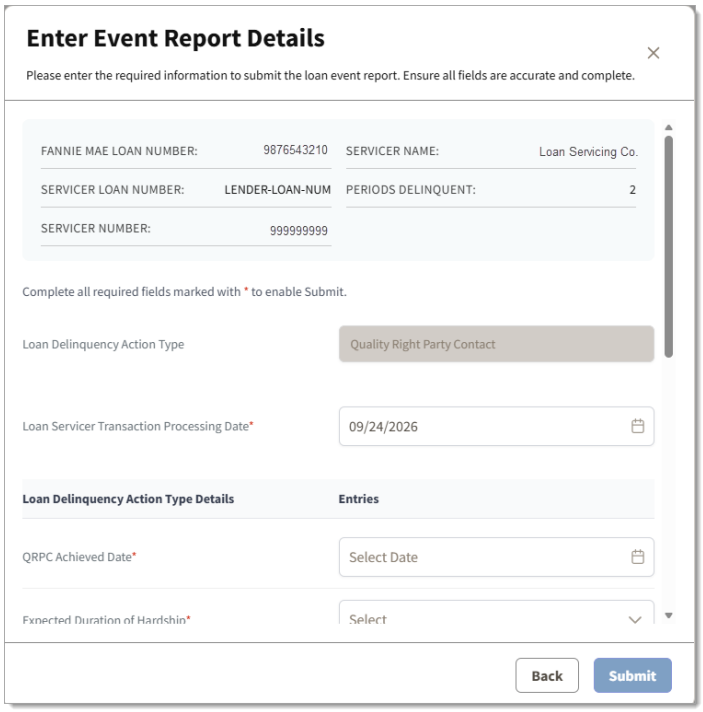
1. Click the **Submit Single Event** button.



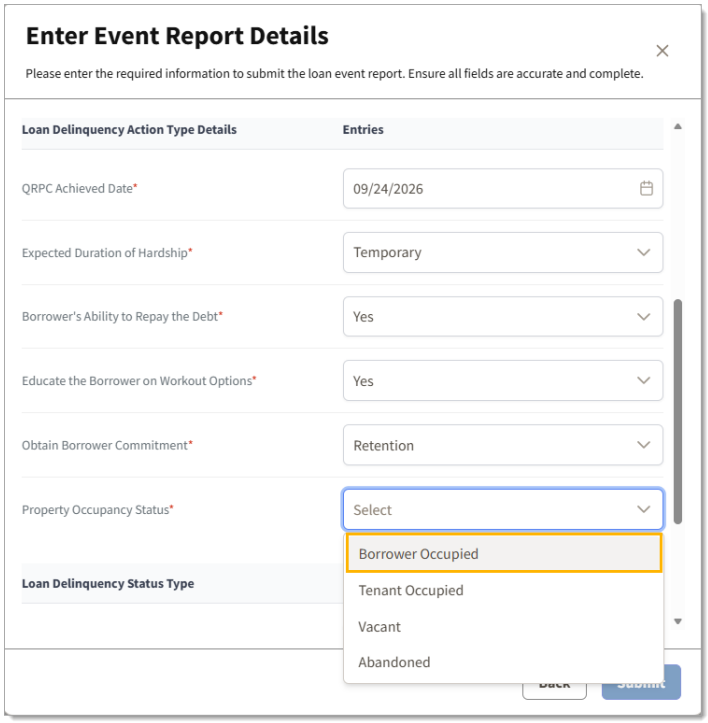
2. Fill in the required information in the "What would you like to report?" pop-up to submit the event.
   A. Enter the Fannie Mae Loan Number.
   B. Select the applicable delinquency reporting information category or categories:
      - Loan Delinquency Servicer Action Type
      - Loan Delinquency Status Type(s)
      - Loan Delinquency Reason Type(s)
   C. Select the applicable Loan Delinquency Action Type from the drop-down menu.
3. Click **Next.**



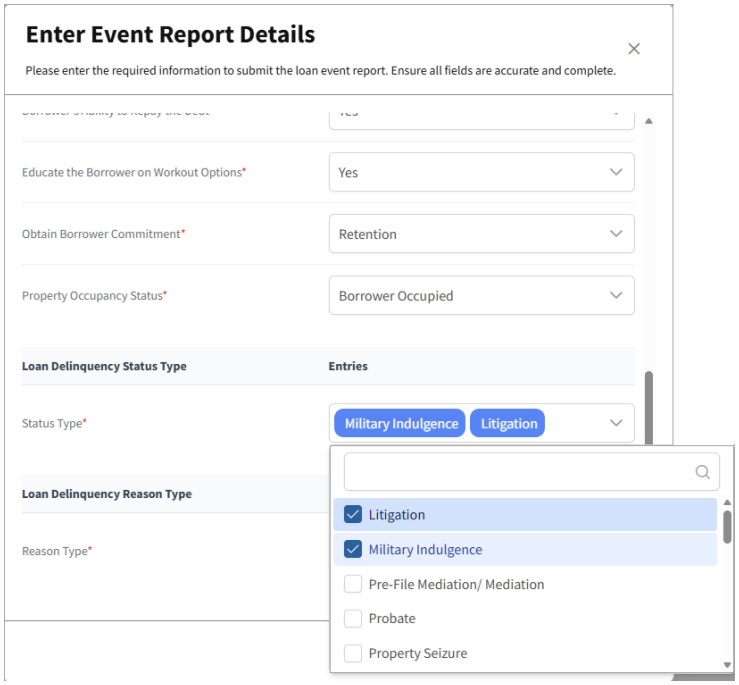
4. Use the calendar function to select the Loan Servicer Transaction Processing Date (when the activity occurred in the servicer's shop and was processed in the servicing system).



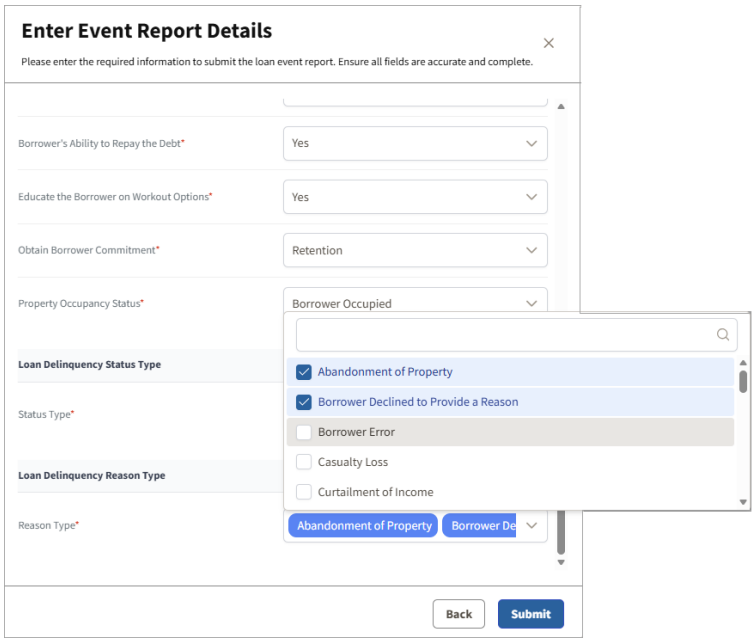
5. Fill in required corresponding data for the selected Loan Delinquency Servicer Action Type.



6. When applicable, select the Loan Delinquency Status Type (s) from the drop-down menu. You may report up to five statuses for each event.

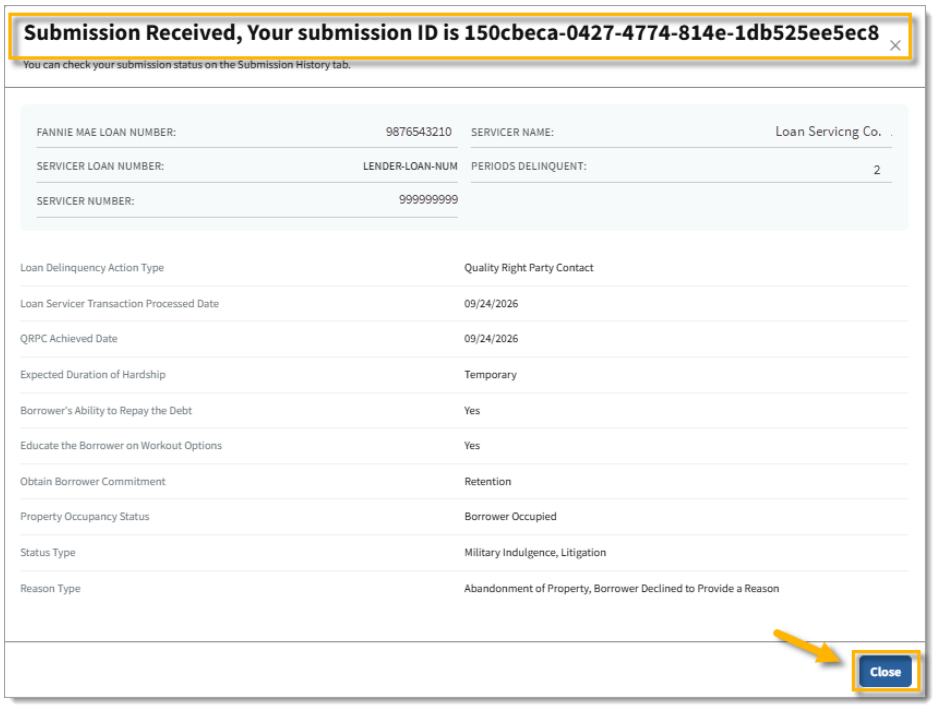


7. When applicable, select the Loan Delinquency Reason Type from the drop-down menu. You may report up to five reasons for each event.



8. When all required information for the event has been added, click the **Submit** button.

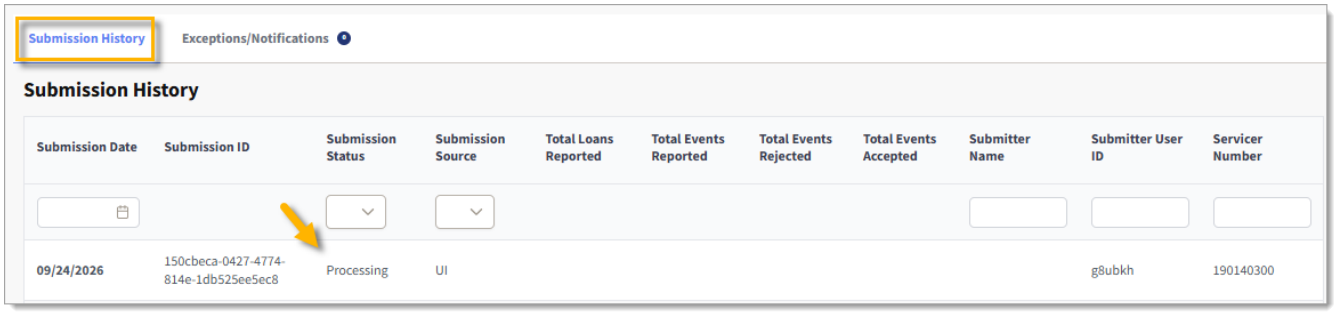
9. The system will confirm the submission was received and provide the submission ID. Click the **Close** button.



10. Click the **Refresh** icon in the browser toolbar to view the Submission status.



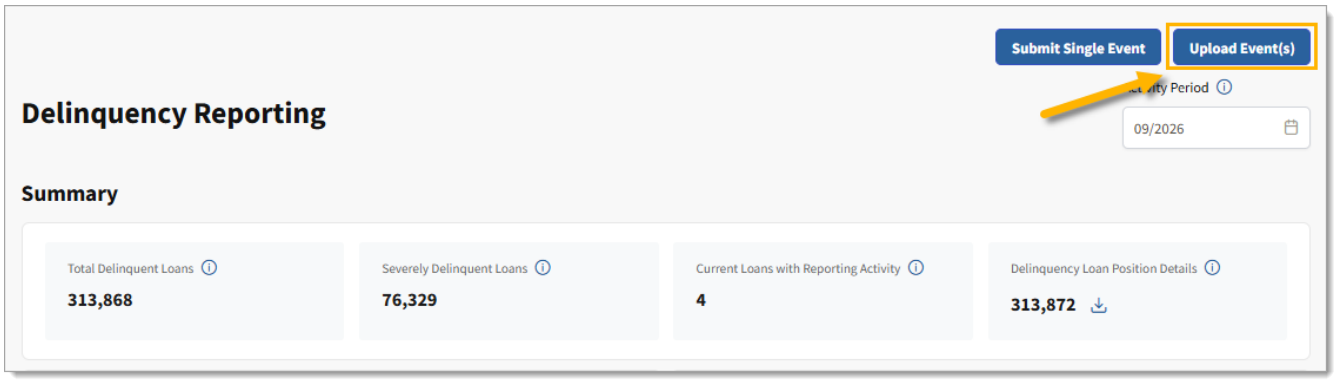
The status of the submitted event will be displayed in the **Submission History** tab, including if it was accepted or rejected.



Upload Event(s)

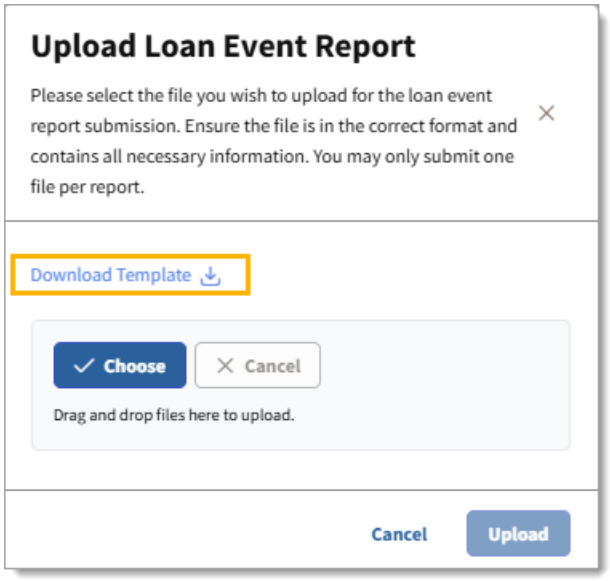
Use **Upload Event(s)** to submit one or more delinquency reporting events (or clear multiple exceptions) within a single file submission.

1. Click the **Upload Event(s)** button.



2. Click **Download Template** link.

> ***Note:*** *The template requires VBA macros to function and is supported only in Microsoft Excel for Windows or macOS. If you having any challenges with the template, see the "Getting Started with the Template" section of the Delinquency Reporting UI Upload Template and CSV Export Quick Reference Guide to enable the macros.*



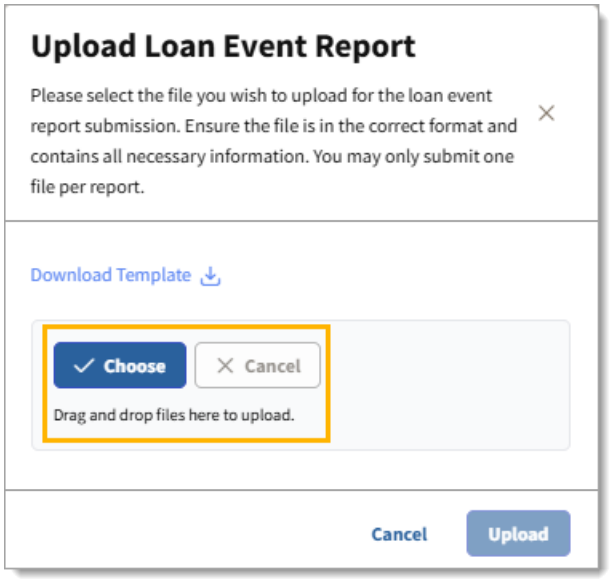
3. Populate the template with the required loan level data. The template will allow the user to submit up to 12,000 events at a time.
4. Each event must contain a sequence number that defines the processing order of transactions with a loan (lowest to highest). Ensure the sequence numbers are unique (but not necessarily consecutive) for each loan in the file and delete all empty rows prior to running the validation process.

5. The template has 38 data field columns, with the first five columns being required for each event and the remaining fields being applicable to the reason, action or status being reporting. Fill in the applicable data fields and Click **Sort + Validate** to validate the file and/or resolve any errors.

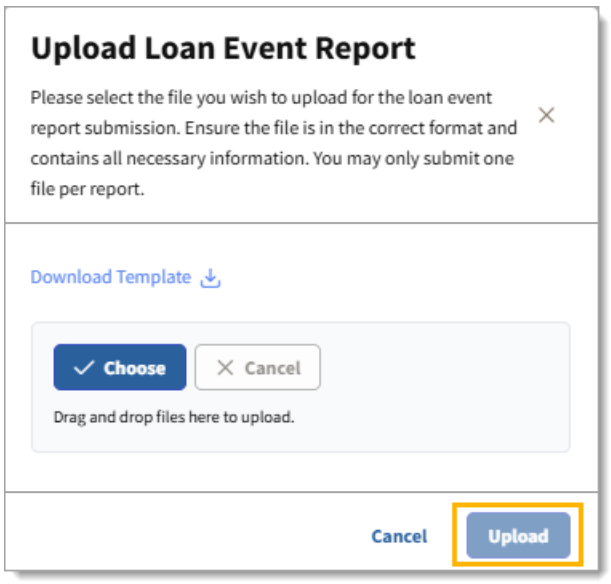
Template Name	Delinquency-Reporting-Event-Manual-Upload (v17)				Disclaimer: The file should be considered draft and is subject to change.				
Total Servicer Count	5				Max File Size: 5 MB				
Total Loan Count	7								
Total Event Count	10	Sort+Validation	Export CSV						
Max Events Allowed	12000								
Max Events Per Loan Allowed	100								
Events									
Loan Event Name	Servicer Number	Fannie Mae Loan Number	Loan Event Sequence Number	Loan Servicer Transaction Processed Date	Loan Delinquency Reason Type	Loan Delinquency Status Type	Loan Delinquency Servicer Action Type	Breach Letter Sent Date	Breach Letter Expiration Date
Delinquency	111111111	1234567890	1	2026-06-10	Borrower Error	Refinance			
Delinquency	111111111	1234567890	2	2026-06-10			Payment Reminder Notice		
Delinquency	111111111	2345678901	1	2026-06-11	Unemployment				
Delinquency	222222222	3456789012	1	2026-06-12	Fraud		Breach Letter Sent	2026-06-06	2026-06-06
Delinquency	222222222	4567890123	1	2026-06-13		Title Issue in Progress			
Delinquency	333333333	5678901234	1	2026-06-14			Referred to Foreclosure		
Delinquency	444444444	6789012345	1	2026-06-15		Chapter 11 Bankruptcy			

6. Click **Export CSV** to convert the template to a .csv format. (File size cannot exceed 5MB.)
7. Click the upload area that says **Drag a file or click here to upload** to attach your .csv file.

> ***Note:*** *The file must use the lowercase .csv extension.*



8. Click the Upload button.

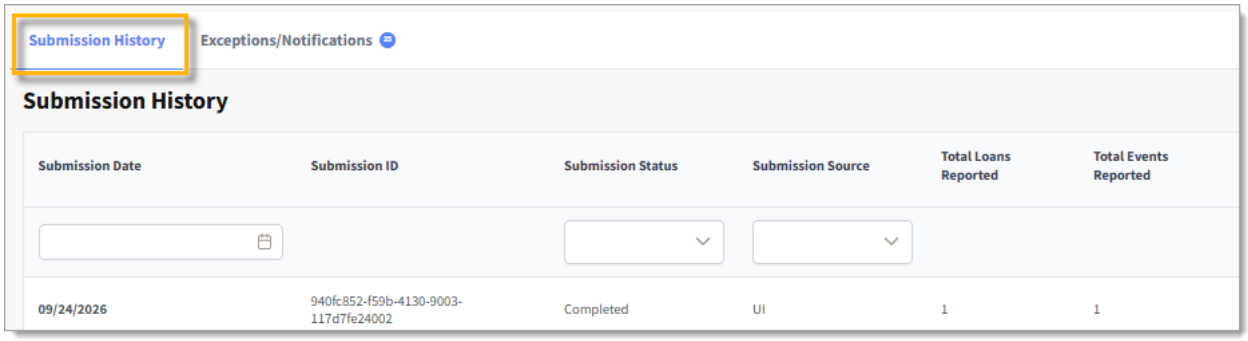


9. Click **Close**.

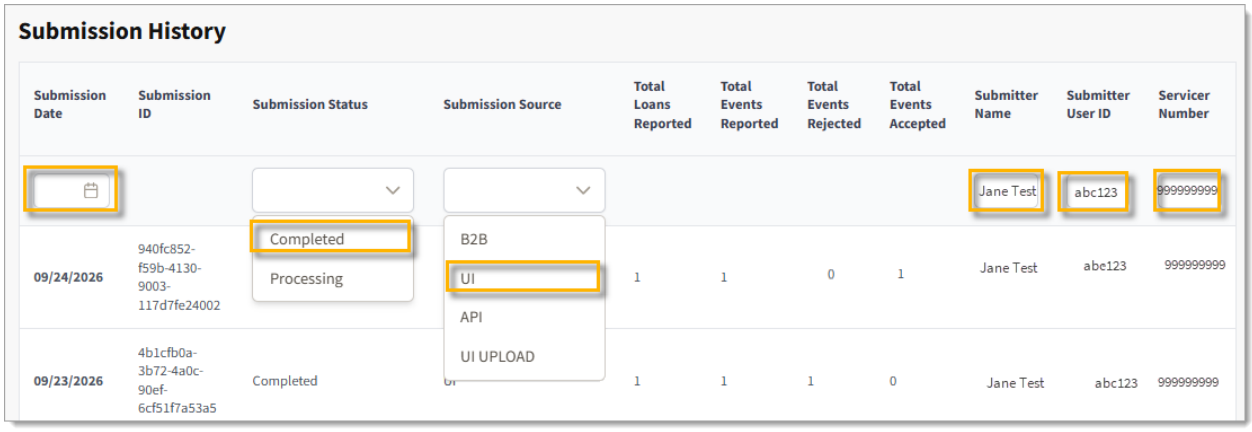
Submission History

The **Submission History** tab shows the status of all submitted delinquency events via B2B, API, and UI reporting channels.

1. Select the **Submission History** tab.



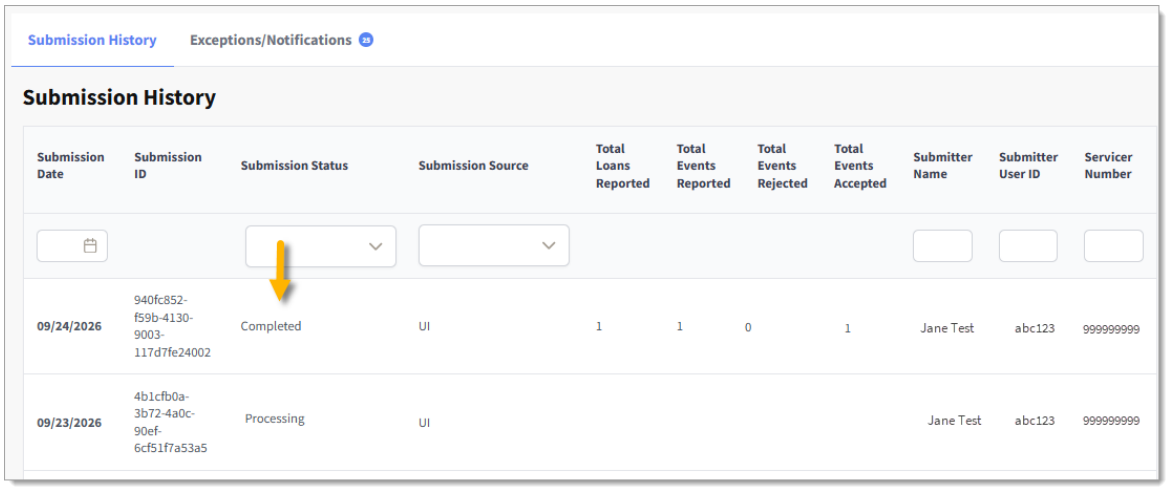
2. Review the results to ensure that all submitted loans/events are displayed.
3. Filter results using the filtering options in the column headers.



> ***Note:*** *The filter can display up to a maximum of 7 days of submissions submitted in the last 13 months.*

4. Review each submission's key submission information including the submission status and source, total number of loans and events reported, how many were rejected and accepted along with important submitter information.

   During peak processing periods, event processing may take longer than usual. As a result, the submission status may temporarily display as **Processing** before updating to **Completed**. A **Processing** status indicates that the submission has been received, is queued, and will be processed in the order it was received.



Exceptions/Notifications

The **Exceptions/Notifications** tab shows loans with open exceptions.

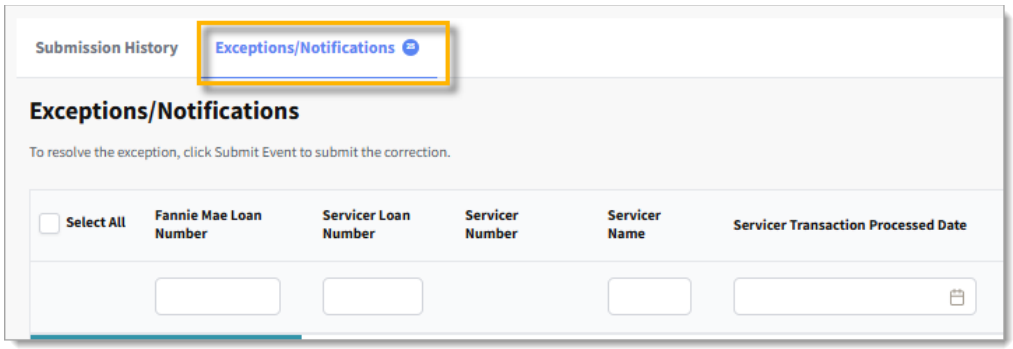
- **Exceptions** are fatal errors that prevent an event from being accepted. The data must be corrected and the event resubmitted.
- **Notifications** are informational or warning messages about data that may be missing or incomplete. Notifications will appear beginning on Calendar Day CD23 and will systematically close after BD2. Users cannot take action to close/clear notifications as these are intended to be informational only. Instead, users should review the loans to ensure the applicable servicer delinquency action(s) have occurred and been reported within the required timelines.

View and Clear Fatal Exceptions

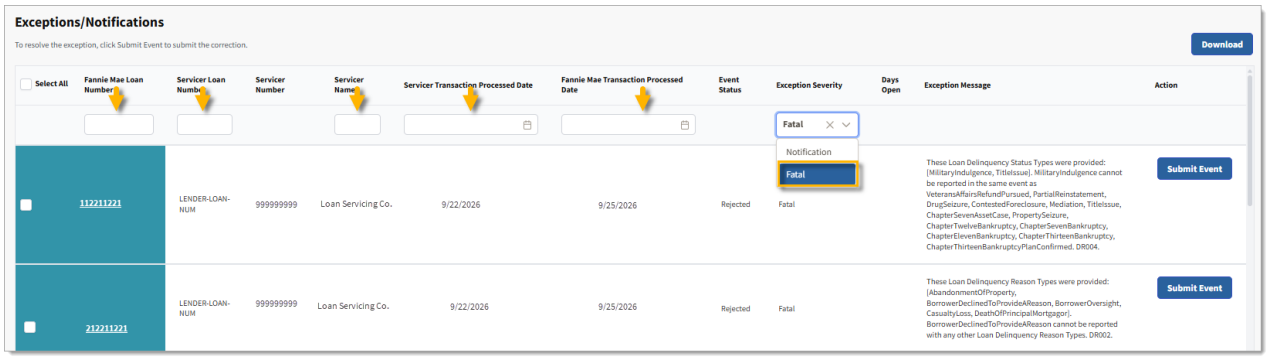
To clear or remove fatal exception(s), you may:

- Submit a new event with corrected data .
- Submit one or more new events with the corrected data via the Upload Event(s) process.
- Close Event (in the Current Exceptions tab on the Loan Details Page)

1. Select the **Exceptions/Notifications** tab.

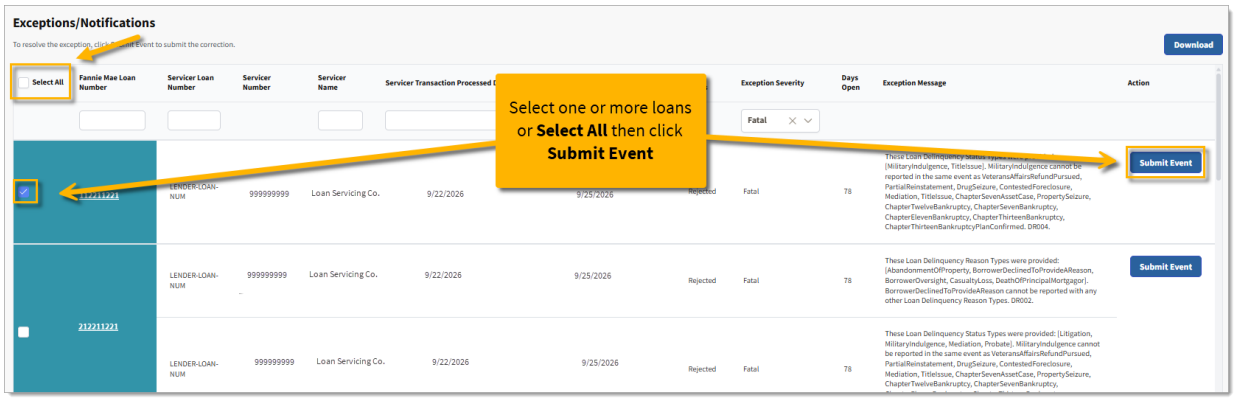


2. Filter results using the filtering options in the column headers.



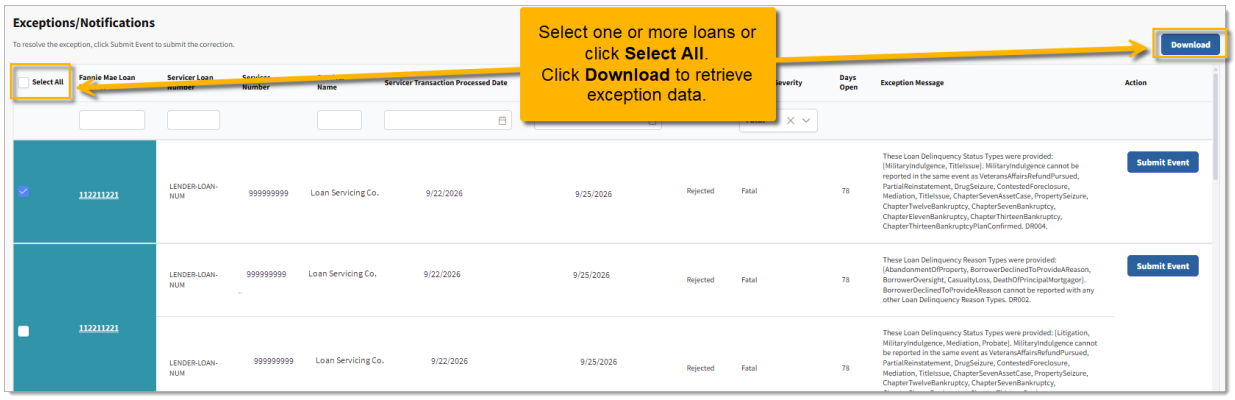
To resolve a single exception:

1. Select the loan with the exception.
2. Click **Submit Event** and use “Submit Single Event” process to submit a new event with the corrected data.
3. Once done, come back to Exceptions/Notifications to see that the cleared exception has been removed from the list.



To download exception(s):

1. **Select All** to download all loans or select individual loan numbers.



2. The download includes loan-level information for all the exceptions selected (see below).

FNM Loan Number	Servicer Loan Identifier	Master Servicer Number	Master Servicer Name	Acting Servicer Number	Acting Servicer Name	Activity Period	Periods Delinquent	Servicer Transaction Processed Date	Fannie Mae Transaction Processed Date	Event Status	Exception Severity	Days Open	Exception/ Notification Rule ID	Exception/Notification Message
1111111111	LENDER-LOAN-NUM	222222222	Servicer A	222222222	Servicer A	202609	1	9/22/2026	9/22/2026	Rejected	Fatal	14	DR002	These Loan Delinquency Reason Types were provided: [Abandonment of Property, Borrower Declined to Provide a Reason, Borrower Error, Casualty Loss]. Borrower Declined to Provide a Reason cannot be reported with any other Loan Delinquency Reason Types. DR002.
1111111111	LENDER-LOAN-NUM	222222222	Servicer A	222222222	Servicer A	202609	1	9/22/2026	9/22/2026	Rejected	Fatal	14	DR004	These Loan Delinquency Status Types were provided: [Litigation, Military Indulgence, Pre-File Mediation/ Mediation]. Military Indulgence cannot be reported in the same event as Veterans Affairs-Refund, Partial Reinstatement, Drug Seizure, Contested or Litigated Foreclosure, Pre-File Mediation/ Mediation, Title Issue in Progress, Bankruptcy Chapter 7 - Asset Case, Probate, Chapter 12 Bankruptcy, Chapter 7 Bankruptcy, Chapter 11 Bankruptcy, Chapter 13 Bankruptcy, Chapter 13 Bankruptcy Plan - Post-Petition Period Utilize, Military Indulgence Completed, Bankruptcy - Property Surrendered. DR004.
1111111111	LENDER-LOAN-NUM	222222222	Servicer A	222222222	Servicer A	202605	1		9/8/2026		Notification	28	DR008	The expected Servicer Action Type of Payment Reminder Notice has not been received DR008

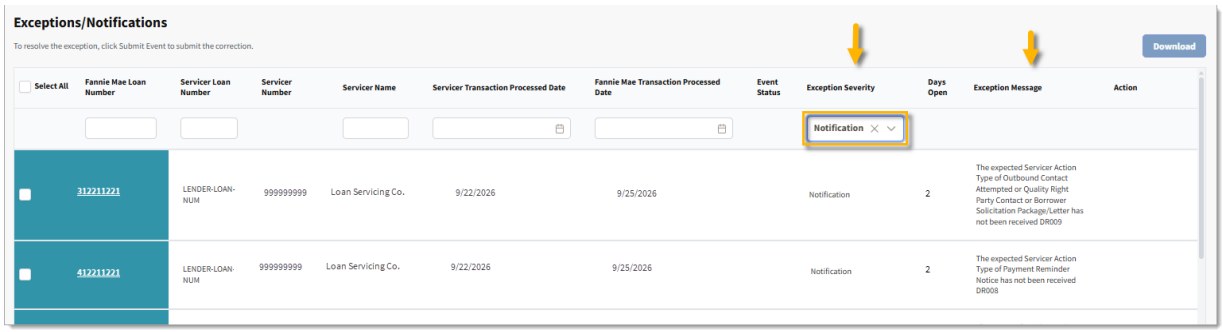
3. Review and clear the exceptions from one the methods outlined above. When complete, return to the Exceptions/Notifications tab to see the cleared exceptions has been removed from the list.

> ***Note:*** *The display defaults to the oldest exceptions first.*

Refer to the Servicing Changes Reference Guide for the list of Delinquency Reporting Business Rules (Notifications and Fatal Exceptions).

View Notifications

1. Filter by **Exception Severity – Notification**
2. View the Exception Message for information on potential missing events with expected servicer actions.
3. Click on the loan number hyperlink to view the **Loan Details** screen and gain access to additional capabilities.



Loan Details screen

The Loan Details screen can be accessed by entering a Fannie Mae loan number in **the FM/Servicing Loan Number Search** field or by clicking the loan number link in the **Exceptions/Notifications tab** as shown above.

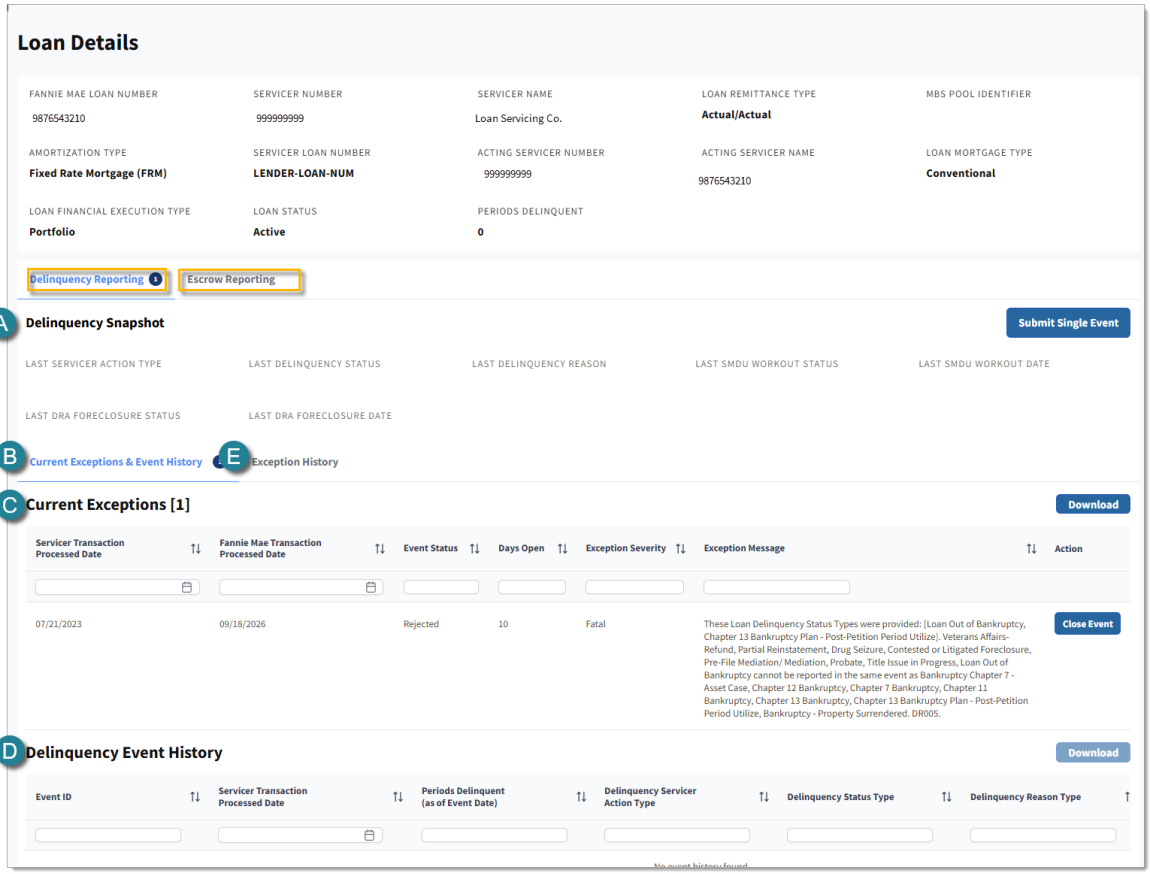
> ***Note:*** *You may access this screen from any application (Delinquency Reporting, Escrow Reporting or Loan Data Change) for which you have been provisioned.*

The top section contains a summary of the Loan Attributes as well as the Delinquency Reporting and other reporting applications tabs for which you have access. Click on the **Delinquency Reporting** tab.

Delinquency Reporting tab

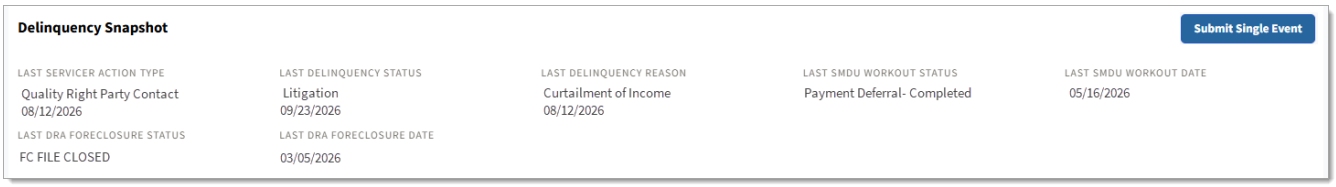
The Delinquency Reporting tab includes the following views and sections:

A. Delinquency Snapshot
B. Current Exceptions & Event History
C. Current Exceptions
D. Delinquency Event History
E. Exception History



Delinquency Snapshot

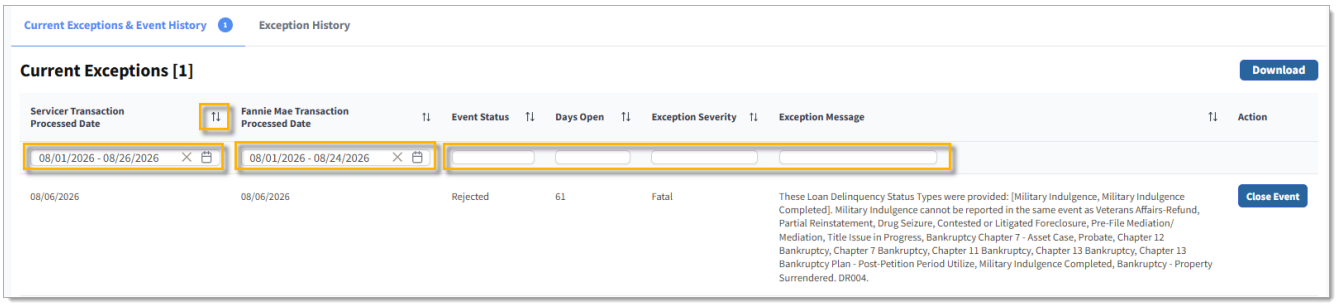
The **Delinquency Snapshot** provides a quick view of the loan's most recently reported delinquency information, including the latest servicer action, delinquency status and reason, SMDU workout status and date, and DRA foreclosure status and date.



Current Exceptions & Event History tab

The **Current Exceptions & Event History** tab displays open exceptions and notifications for the selected loan, along with a history of accepted delinquency events. Users can review error details, correct and resubmit events with fatal exceptions, and view previously reported delinquency activity.

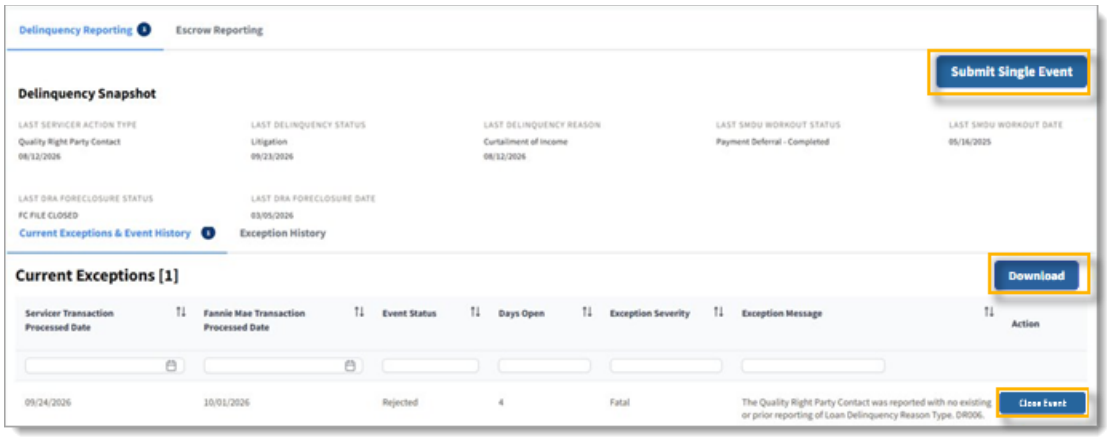
Use the filter and sorting capabilities to drill down to the desired delinquency exception and event history data.



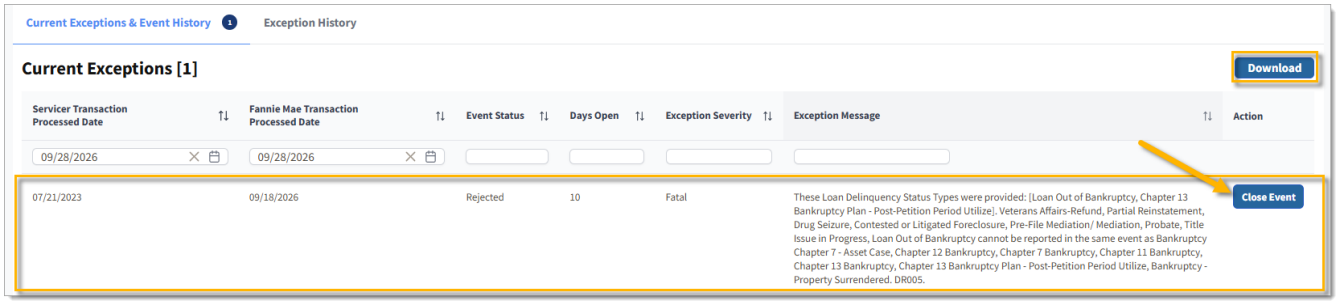
Current Exceptions & Close Event

The **Current Exceptions** section displays open exceptions and notifications for the selected loan. Each row provides the servicer and Fannie Mae transaction processed dates, the event status, the number of days the exception has remained open, the exception severity, and a message describing the condition that requires review. Users can use this information to assess the item and determine the next course of action:

- Click **Download** to download the list of current exceptions.
- Click **Submit Single Event** button to clear the Fatal exception (loan number will be pre-populated).
- Click **Close Event** to close the exception for scenarios in which submitting a new event is not applicable.

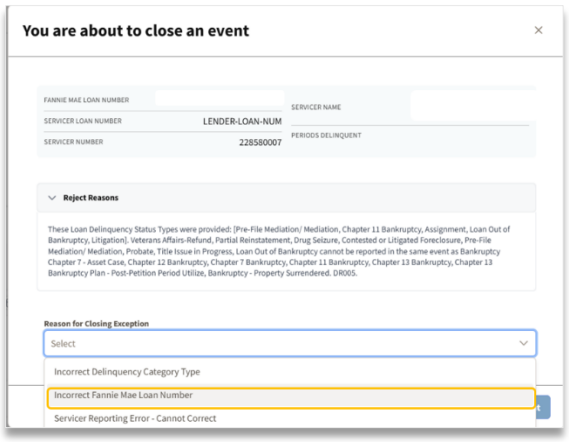


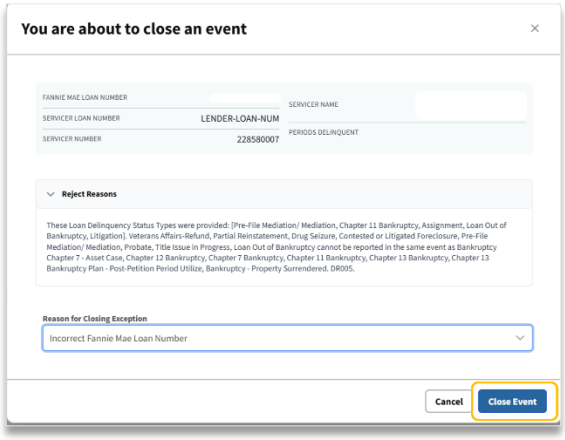
1. To close the event, click the **Close Event** button.



> ***Note:*** *Users may also search for events with exceptions within specific dates range based on Servicer or Fannie Mae Transaction Processed Date filters.*

2. When the Pop-up window appears, select the reason the exception is being closed from the “Reason for Closing Exception” drop-down menu. Click **Close Event** when done.

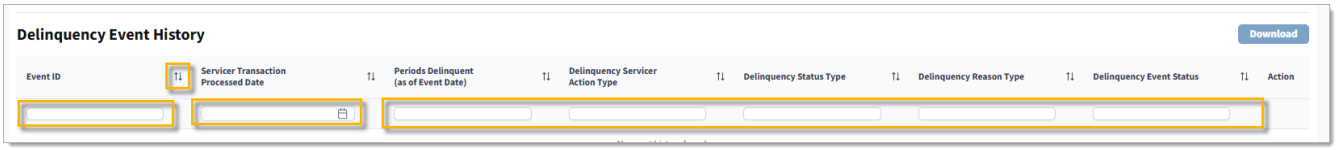




Delinquency Event History & Invalidate Events

The **Delinquency Event History** section provides a chronological record of accepted delinquency events reported for the selected loan. Users can review prior delinquency statuses, reasons, servicer actions, processing dates, and related activity to track how the loan’s delinquency information has changed over time.

Use the filter and sorting options to locate prior events.

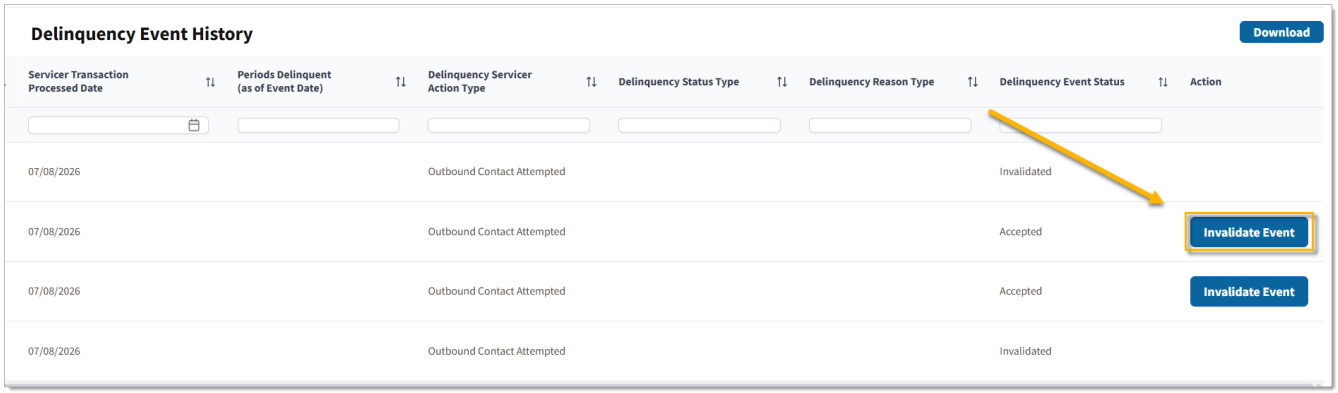


For events that were previously reported and accepted, but submitted in /with errors, users may “Invalidate the Event” to remove it from the list of accepted events.

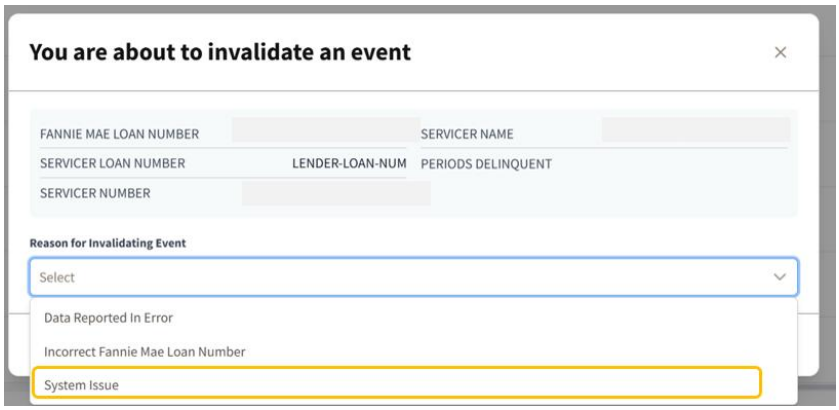
> ***Note:*** *This function is available for events submitted and accepted within the last 13 months.*

To do so:

1. Click **Invalidate Event** button.

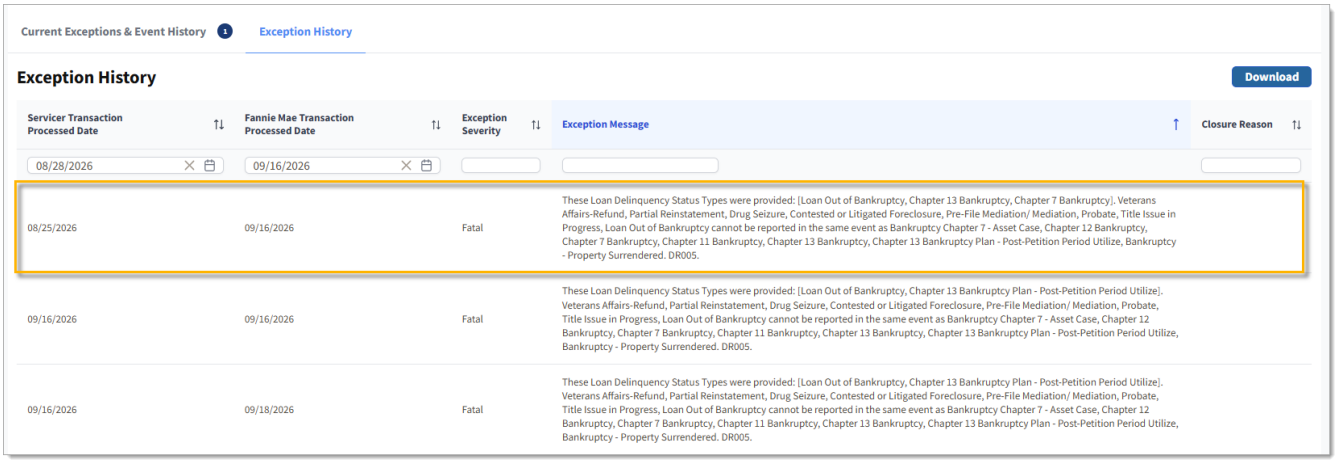


2. When the Pop-up window appears, select the reason the event is being invalidated from the “Reason for Invalidating Event” drop-down menu. Click **Invalidate Event** when done.

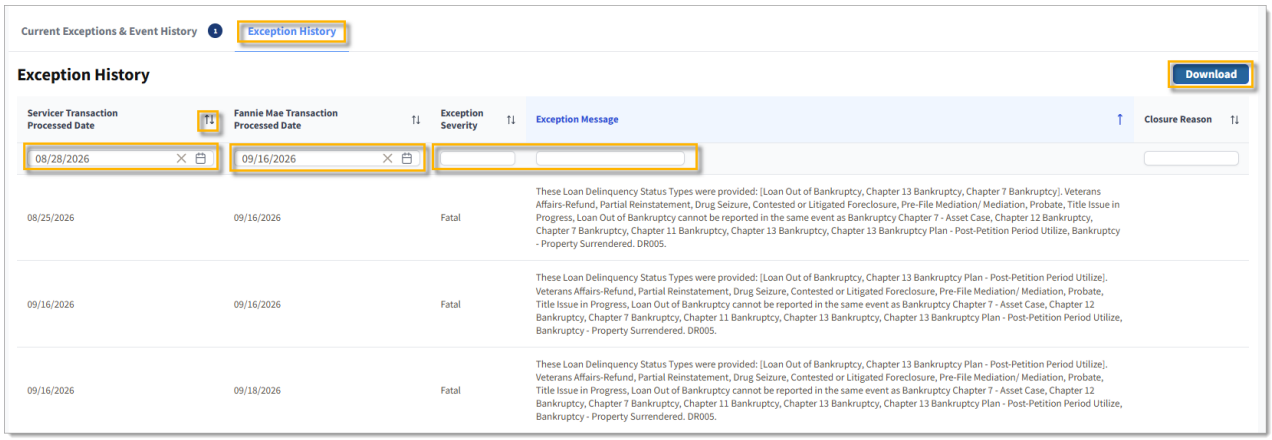


Exception History tab

The **Exception History** tab displays delinquency exceptions that have been resolved or closed for the selected loan, providing a historical record of the exception details and resolution. Users can review the available details to understand what condition caused each exception, when it was reported and resolved, and how the exception was addressed over time.



- Use the filter and sorting capabilities to drill down to the desired delinquency exception and event history data.
- Use the **Download** button to download the list of historical exception data.



Loan Data Change

Overview

Loan Data Change Management is a centralized solution that supports loan data change requests via the Fannie Mae Servicing Platform UI. It replaces the current Post-Purchase Adjustment process in Loan Servicing Data Utilities. The centralized process improves visibility into servicing data and loan attributes, reduces manual validation and email exchanges, and supports more timely corrections through automated validation and centralized request tracking.

Testing environment access

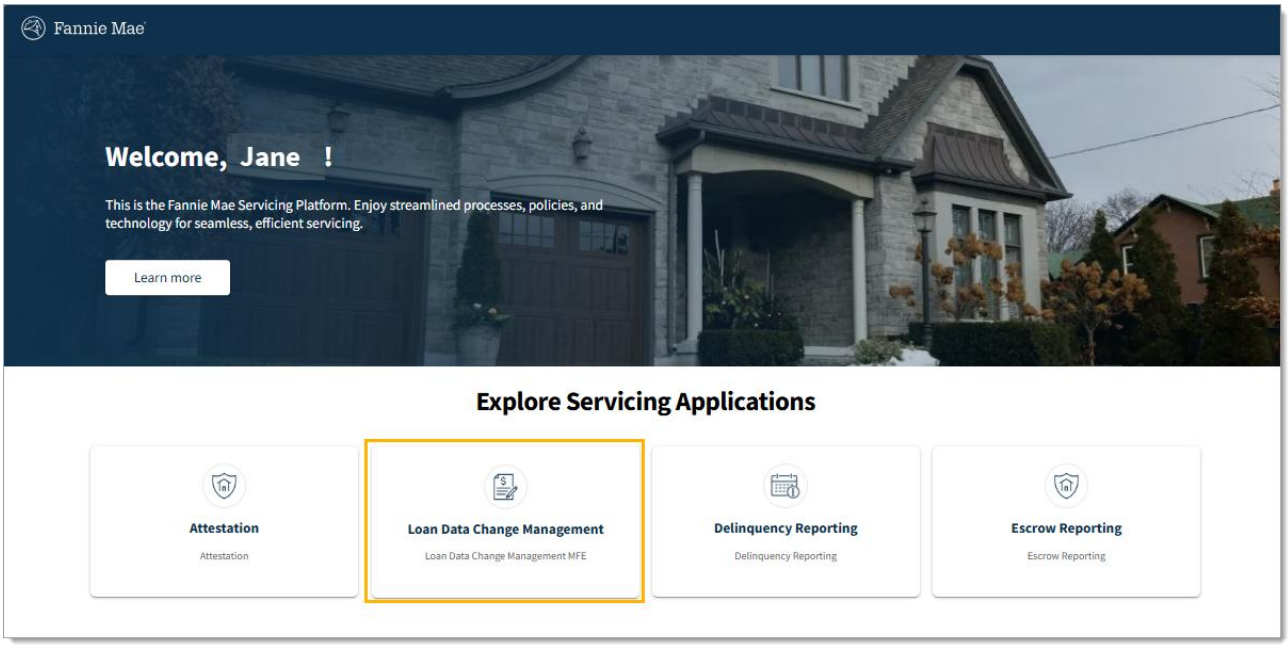
Seller/servicers designated for **required** testing were notified by Fannie Mae in September 2026. All other seller/servicers are encouraged to participate in UI testing but are not required. To obtain access to the Fannie Mae Servicing Platform Loan Data Change UI test environment:

- Seller/servicers must submit the Loan Data Change UI CIT Environment access request form; users with existing Escrow Reporting or Delinquency Reporting test IDs may reuse their credentials but are still required to submit the form.
- Fannie Mae will provide access and provide User IDs for each testing participant. Users will be notified when access to the Loan Data Change testing environment has been granted.
- Once provisioned, users will access the test environment here.
- Testing is scheduled to open at 9:00AM EST on November 2, 2026.

Open Loan Data Change Management (CIT environment)

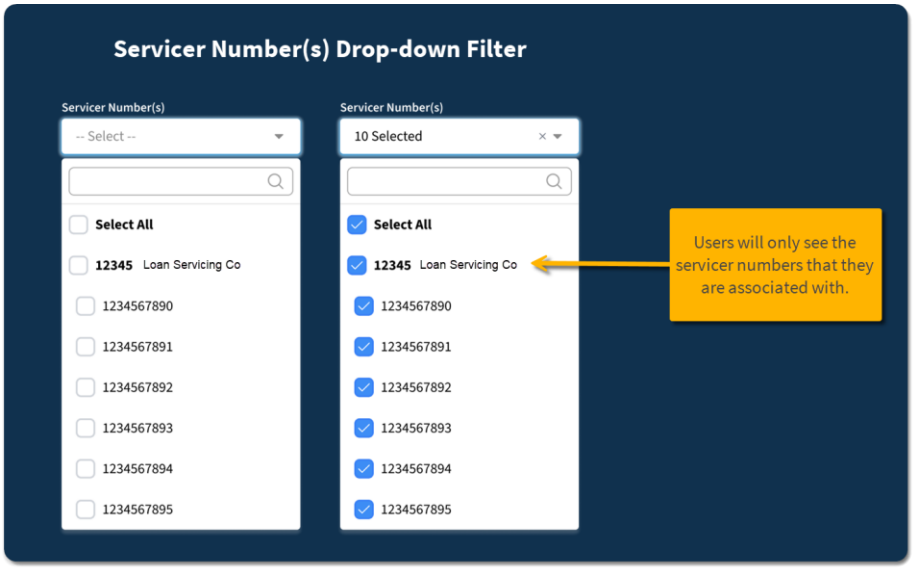
Log in to Servicing Platform Test Environment and then follow the steps below to open the Loan Data Change Management capability.

Select **Loan Data Change Management** from the application tiles on the Welcome page to navigate to the Loan Data Change page.



Search by Servicer Number(s)

Use the **Servicer Number(s)** drop-down to **Select All** 5-digit or 9-digit Servicer Numbers or select individual 5-digit or 9-digit Servicer Number(s). Users should verify that expected Servicer Numbers are available.



Summary Overview

The **Loan Data Change Summary** provides the latest summary of change request statuses for the selected activity period.

When logging in for the first time, the Summary and Request Activity sections will be blank. These sections will populate after one or more requests are submitted.

Status Tracking Levels

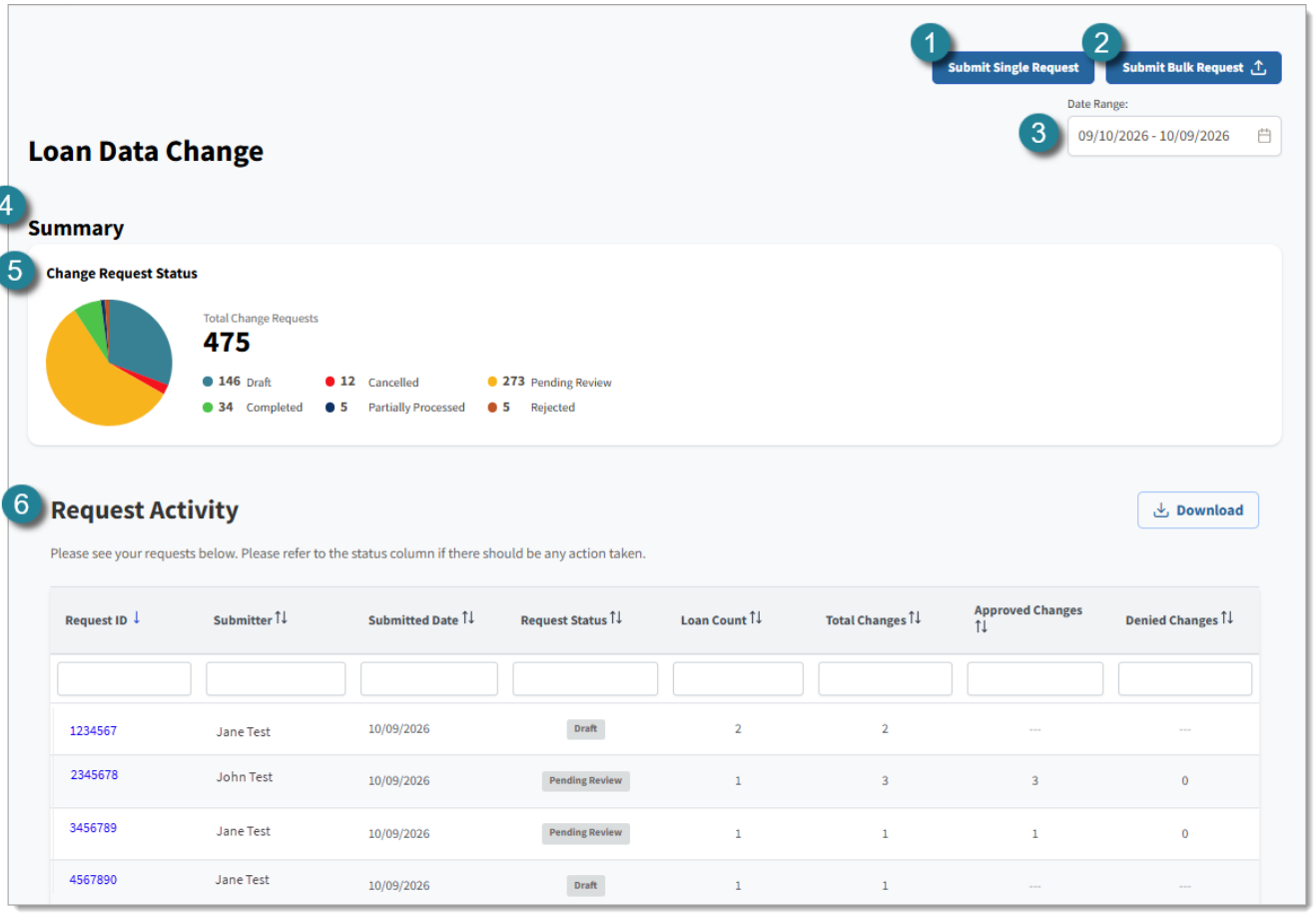
Servicers can track the progress of a loan data change at three levels. Request-level statuses appear in Request Activity, while loan- and attribute-level statuses appear after selecting a Request ID to view the request details. The following table lists the possible statuses at each level.

Request Level Status (Request Activity Screen)	Loan Level Status (Loan Data Change Details Screen)	Attribute Level Status (Loan Data Change Details Screen)
▪ Draft ▪ Pending Review ▪ Completed ▪ Partially Processed ▪ Rejected ▪ Cancelled	▪ Pending Review ▪ Reclass ▪ Approved ▪ Partially Processed ▪ Rejected ▪ Repurchase ▪ Reclass Completed	▪ Pending ▪ Reclass ▪ Approved ▪ Rejected ▪ Repurchase ▪ Reclass Completed

Loan Data Change Field Definitions

Refer to the following table to understand the fields available on the **Loan Data Change Summary** screen and how each field supports request submission and tracking.

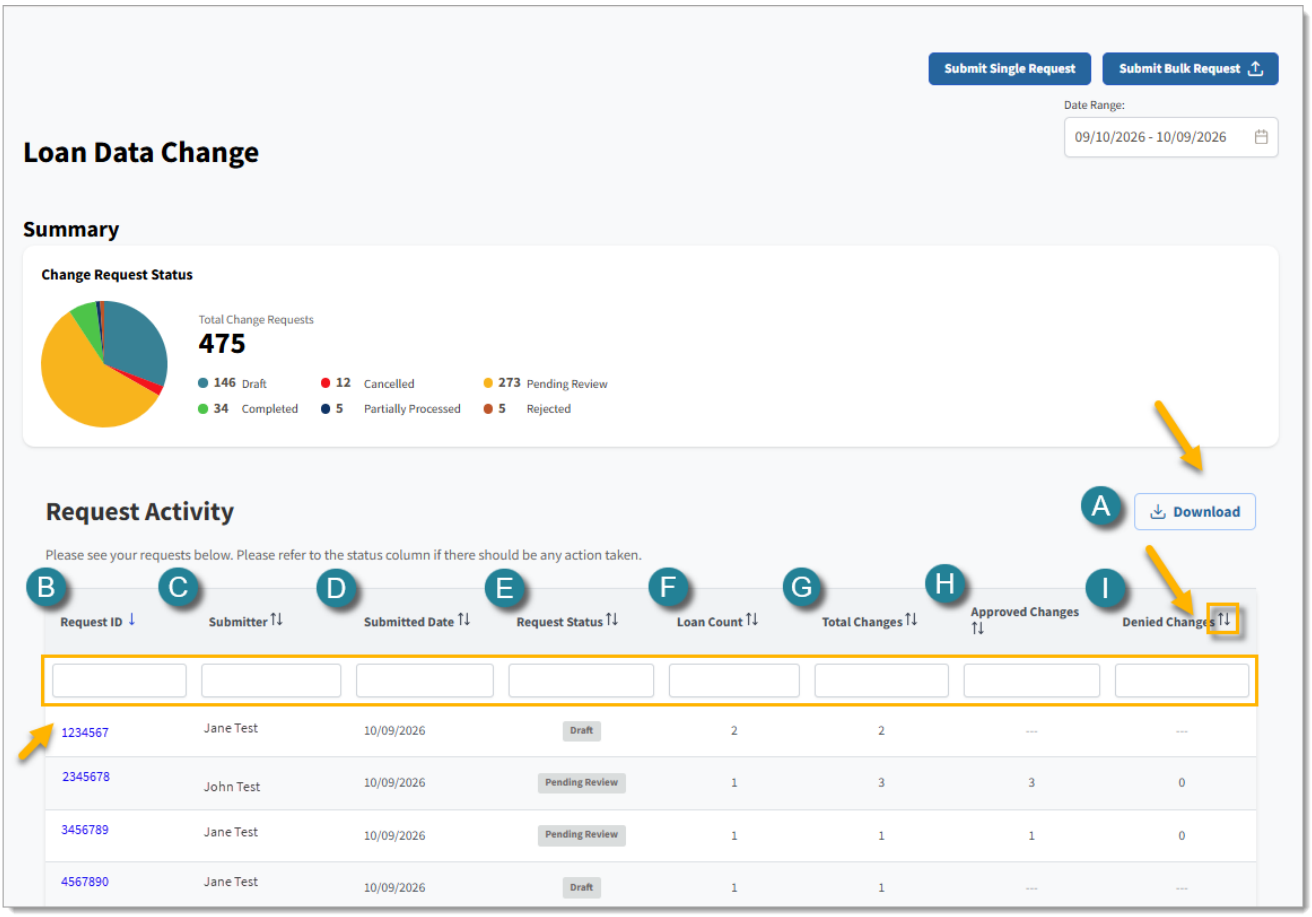
	Field Name	Description
1	Submit Single Request	Submits one or more loan data change requests through one single request.
2	Submit Bulk Request	Uploads multiple loan data change requests in a single file.
3	Date Range	Allows users to select a start and end date to filter the change requests displayed in the Loan Data Change Summary for the specified period within the most recent 13 months.
4	Summary – Change Request Status	Summarizes total loan data change requests by status for the selected date range.
5	Change Request Status	Displays the number of loan data change requests by status for the selected date range, providing a summary of where requests are in the review and processing workflow.
6	Request Activity	Displays request-level activity, including the request ID, submitter, submission date, request status, loan count and change totals.



Request Activity

The Request Activity section displays loan data change requests for the selected date range. Use this section to review request status, submission details, loan counts, and the number of approved or denied changes.

	Field Name	Description
A	**Download**	Download the change request activity details, including request status, submitter information, loan counts, and change totals.
B	**Request ID**	Hyperlink directs the user to a draft prior to submission and to a request after submission.
C	**Submitter**	Identifies the user who submitted the loan data change request.
D	**Submitted Date**	Displays the date the loan data change request was submitted.
E	**Request Status**	Indicates the status of the request in the review and processing workflow. ▪ **Draft** - The request has been saved but has not been submitted for review. The user can continue to update the request until the end of the 3rd business day at which point the request will automatically be canceled. ▪ **Cancelled** - The request was canceled by the user or automatically canceled after remaining in Draft status for 2 business days. ▪ **Partially Processed** - Some requested loan data changes were approved, while others were denied. ▪ **Pending Review** - The request has been submitted and is awaiting review. ▪ **Rejected** - Requested loan data changes were denied. ▪ **Completed** - Processing is complete, and all approved changes have been applied.
F	**Loan Count**	Displays the number of unique loans included in the request.
G	**Total Changes**	Displays the total number of loan data changes included in the request.
H	**Approved Changes**	Displays the number of requested changes that were approved.
I	**Denied Changes**	Displays the number of requested changes that were denied.



Use the sorting and filtering options to drill down to specific Request ID(s).

Click the **Download** button to download and view the list of submitted requests and request status.

	A	B	C	D	E	F	G	H
1	Request ID	Submitter	Submitted Date	Request Status	Loan Count	Total Changes	Approved Changes	Denied Changes
2	1234567	Jane Test	10/13/2026	Draft	1	1	---	---
3	2345678	John Smith	10/12/2026	Pending Review	1	1	0	0
4	3456789	John Geisler	10/12/2026	Draft	1	7	---	---
5	4567890	John Smith	10/12/2026	Pending Review	1	1	0	0
6	5678901	Jane Test	10/12/2026	Draft	1	4	---	---
7	6789012	Trisha Smith	10/12/2026	Cancelled	1	1	---	---
8	7890123	Tina Jones	10/12/2026	Pending Review	2	6	6	0
9	8901234	John Smith	10/12/2026	Pending Review	1	1	1	0
10	9012345	Steve Brown	10/10/2026	Pending Review	1	2	0	0

Note: *Download summary counts and loan-level information reflect the selected Activity Period, with prior periods showing period-end data. Request Activity reflects updates based on the* ***Date Range*** *3 on page 8) and allows users to view up to 13 months of Loan Data Change data.*

After reviewing existing request activity, servicers can submit a new loan data change request using the single-request or bulk-request option. The following section explains how to submit a single request.

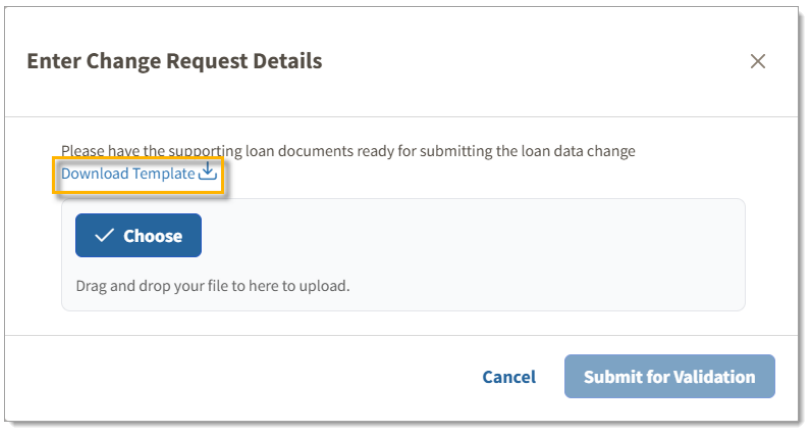
Enter and Submit Bulk Request

Use **Submit Bulk Request** to submit one or more loan data change requests within a single file submission. Supported file format is .xlsx or .xlsm. Unsupported file formats will be rejected and produce an error message.

The template is an Excel macro-enabled spreadsheet. Users must enable the macros to use the template.

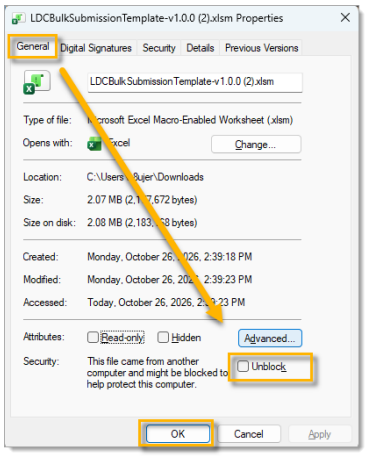
1. Click **Submit Bulk Request**. The **Enter Change Request Details** modal will pop up.

2. Select **Download Template**.

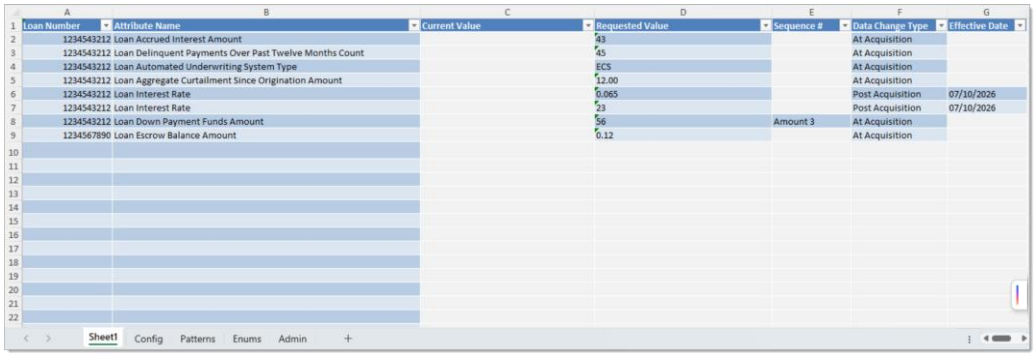


3. Open the downloaded template.

Note: *It may be necessary to enable the macros in the template on the initial download. Right-click on the file, proceed to* ***Properties****, select the* ***General*** *tab, select* ***Unblock*** *and click* ***OK****.*



4. Complete the fields with the necessary changes and save the spreadsheet locally.

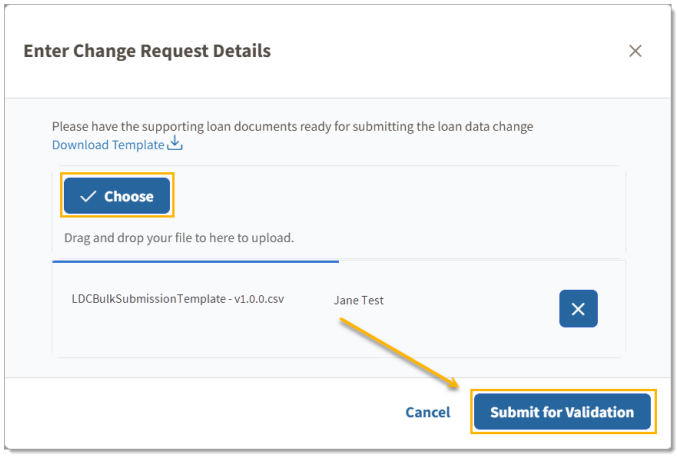


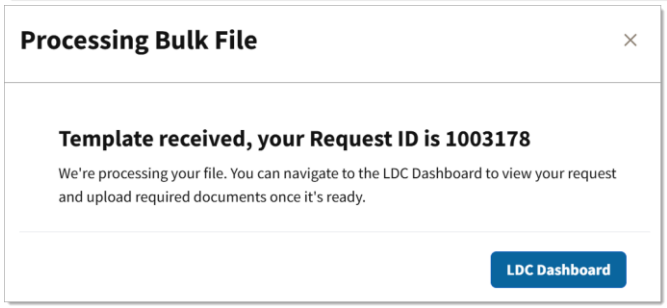
	A	B	C	D	E	F	G
1	Loan Number	Attribute Name	Current Value	Requested Value	Sequence #	Data Change Type	Effective Date
2	1234543212	Loan Accrued Interest Amount		43		At Acquisition	
3	1234543212	Loan Delinquent Payments Over Past Twelve Months Count		45		At Acquisition	
4	1234543212	Loan Automated Underwriting System Type		ECS		At Acquisition	
5	1234543212	Loan Aggregate Curtailment Since Origination Amount		12.00		At Acquisition	
6	1234543212	Loan Interest Rate		0.065		Post Acquisition	07/10/2026
7	1234543212	Loan Interest Rate		23		Post Acquisition	07/10/2026
8	1234543212	Loan Down Payment Funds Amount		56	Amount 3	At Acquisition	
9	1234567890	Loan Escrow Balance Amount		0.12		At Acquisition	

Sheet1 Config Patterns Enums Admin

5. Click **Choose** to search for the file **OR** drag and drop the file into the upload area.

6. Click **Submit for Validation**. A return message will display with the Request ID for reference.





7. Refresh the browser, return to the **Loan Data Change** home screen to locate the request ID in the **Request Activity** section. The request will be in **Draft** status.
8. Open the **Draft** request and attach any required supporting documentation.
9. Click **Submit** and refresh the browser.
10. Locate the request in the Request Activity log.
11. Review the **Loan Data Change Details** to confirm that the request was successful. If the status is in **Cancelled** status, the user must correct any errors in the template and resubmit.

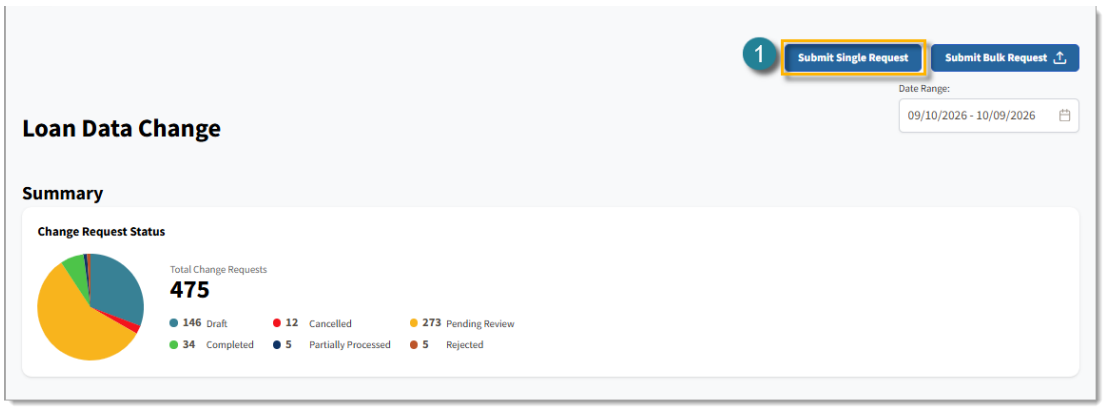
> ***Note:*** *A banner message will notify the user of the required corrections for a successful submission.*

12. Proceed to Add Loan Documents.

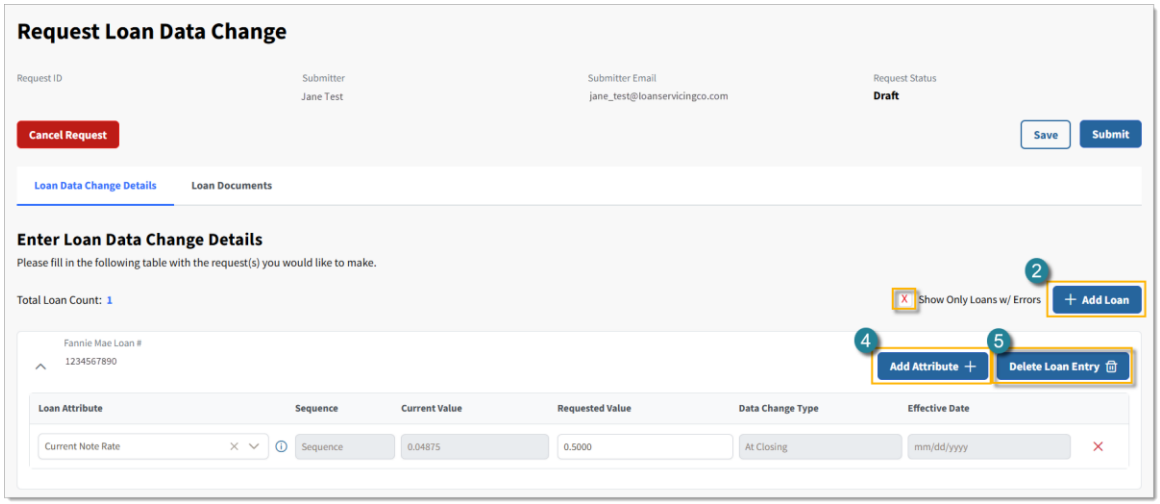
Enter a Single Request

Single or multiple changes can be made to one loan or multiple loans in one request. Follow the steps below to complete request(s) through the UI.

1. Click the **Submit Single Request** button in the top right corner of the page. The Request Loan Data Change screen will open.



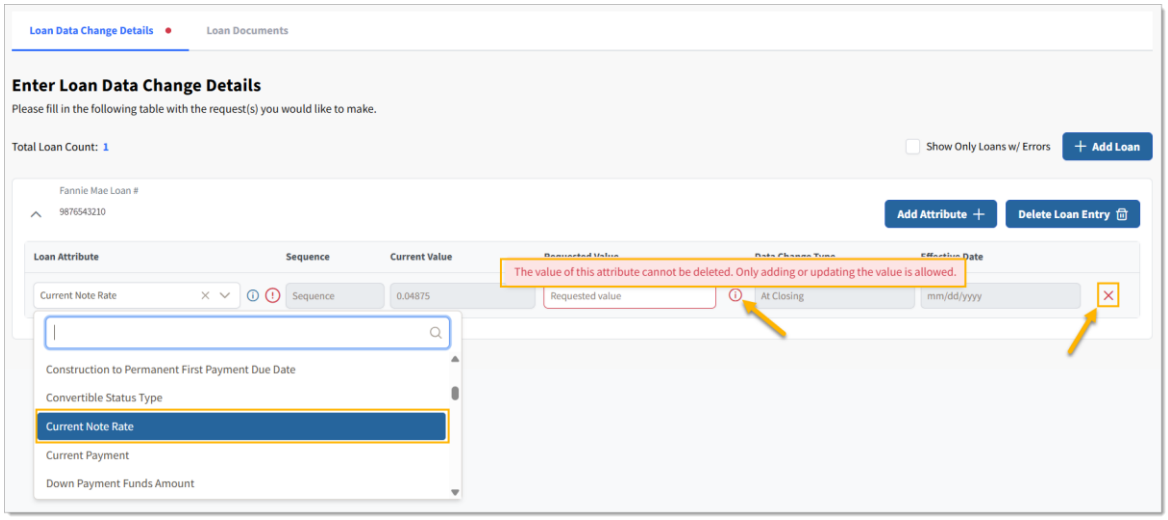
2. From the **Loan Data Changes Details** section, click **+ Add Loan** to add a new change.
   Users may check the **Show Only Loans w/ Errors** option to filter the loans to that specific population.
3. Enter the Fannie Mae 10-digit loan number.
4. Click **Add Attribute +** to identify the attribute to be changed.
5. Users can click **Delete Loan Entry** to remove the entry before saving; however, it is recommended to **Save** as you go to ensure all requests are saved to the Servicing Platform.



Enter Loan Data Change Details

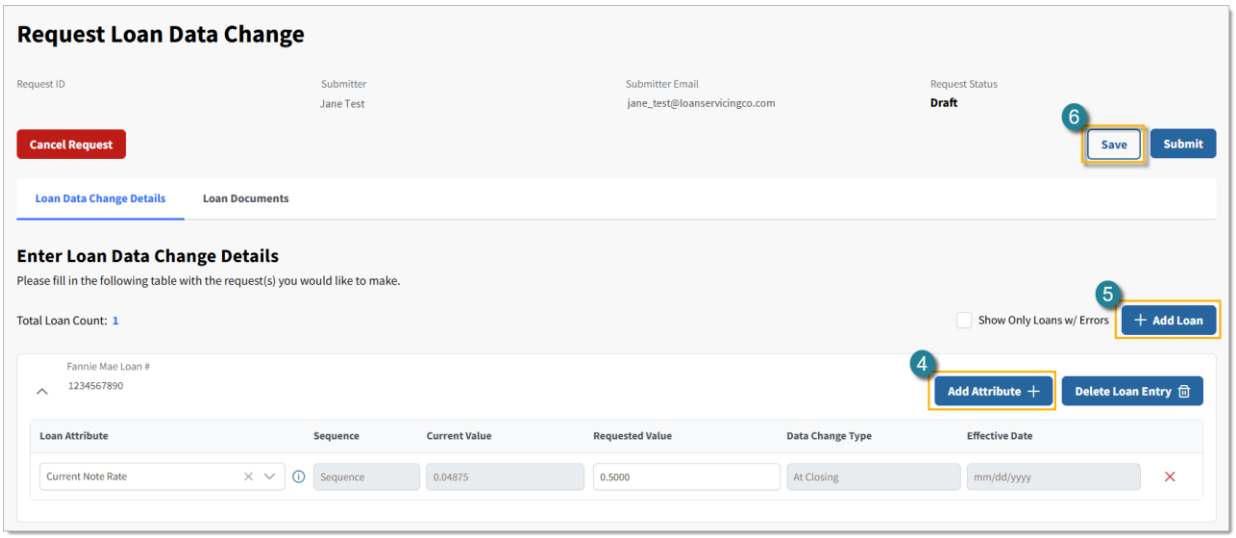
After entering the Fannie Mae loan number, the loan attribute fields will open.

1. Click **Select Attribute** and choose the loan attribute from the drop-down list.
2. Complete the fields requiring updates. These fields will be identified by the red ⓘ icon. Click the icon for additional details on required information.
3. Click the "**X**" to remove the attribute.

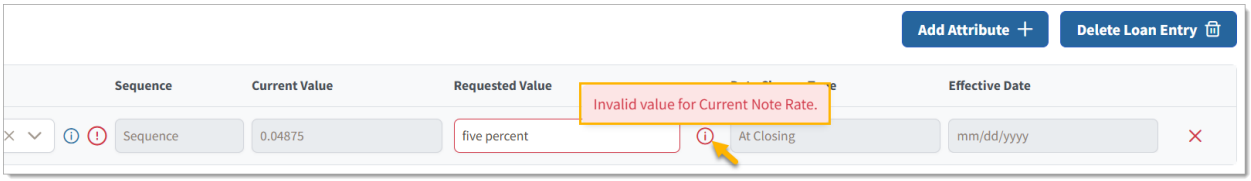


> ***Note:*** *Click **Save** after entering each requested change, before adding another attribute or loan to prevent lost data.*

4. Click **Add Attribute** to request another change on the same loan **OR**
5. Click **Add Loan** to add an additional loan(s) to the request **OR**
6. Click **Save** to proceed without submitting (request will remain in **Draft** status for 2 business days)**.**



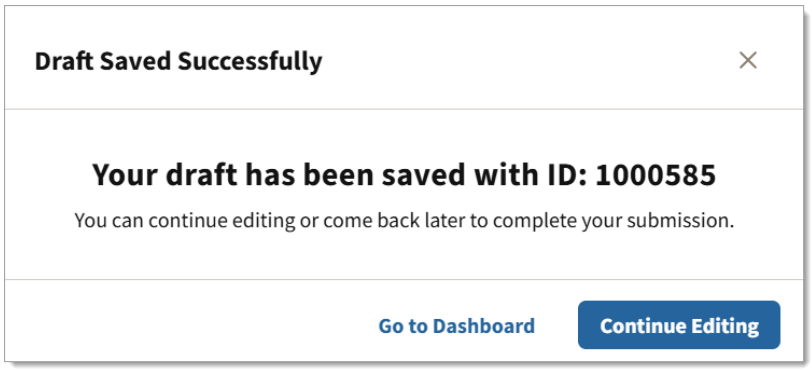
Note: *If not applicable or incorrectly formatted data is entered, the user will be unable to proceed without correcting it. Hover over the ⓘ icon to view what needs to be changed.*



To add additional attribute change requests on the same loan, click **Add Attribute+** and repeat the steps above for each requested change to the loan.

To add additional loans to the request:

1. Repeat the process from Step 2-4 above until all change request attributes are included in the request.
2. Scroll to the top of the screen and click **Save** to proceed without submission. The system will assign a Request ID. The user can choose to return to the dashboard or proceed directly to the next steps.



3. Refresh the browser to update the request status and display the latest activity. If supporting documentation is not required, the user may choose to click **Submit** and proceed with the request or add to the request by repeating the steps outlined above.
4. If supporting documentation is required, proceed to the Add Loan Documents section.

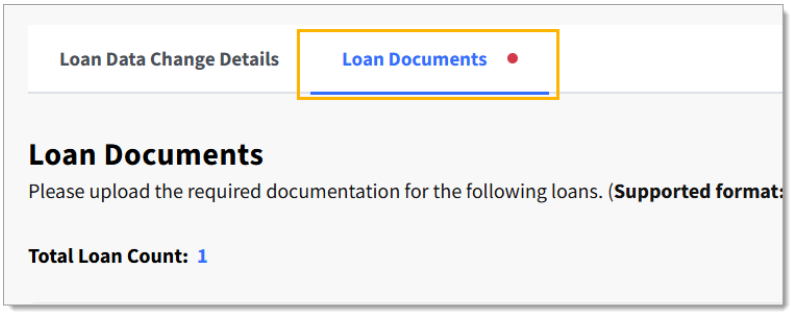
Add Loan Documents

Changes requiring supporting documentation are identified by a red ● on the Loan Documents tab.

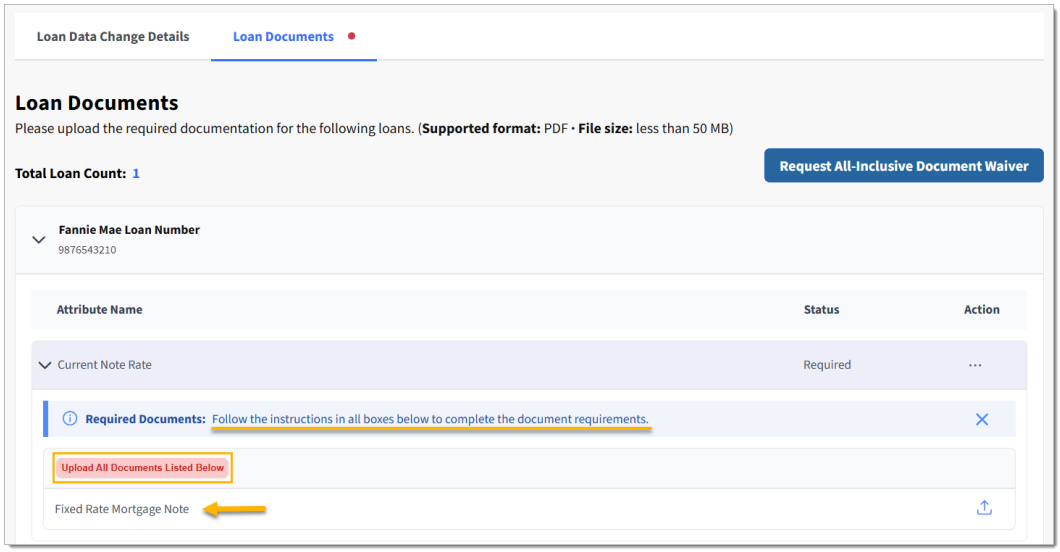
If supporting documentation is required, complete one of the following options, as applicable:

- Upload the required documents
- Request a waiver for an individual document, or
- Request an all-inclusive document waiver.

Upload Supporting Documents



1. Review required documents listed below the changed attribute.



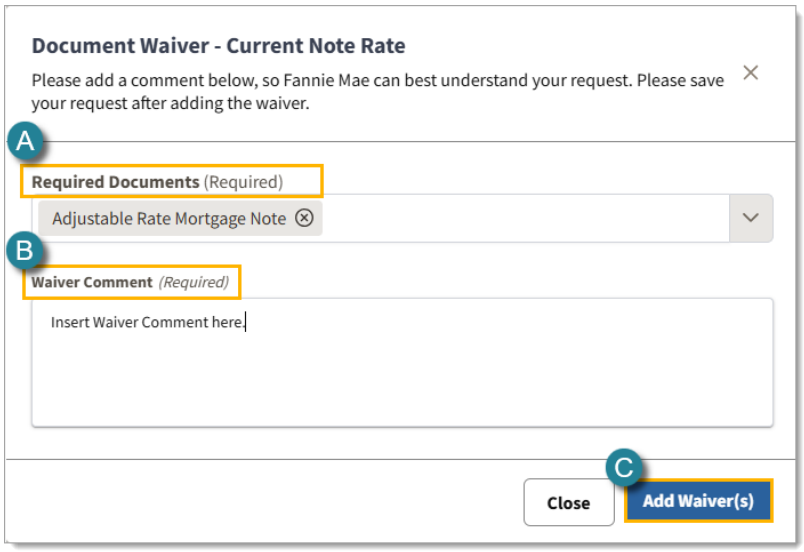
2. Click the Upload icon to add supporting documents to the request.

Add Waivers

Request a single waiver

If the required document(s) are unavailable, request a single waiver for the applicable loan or attribute.

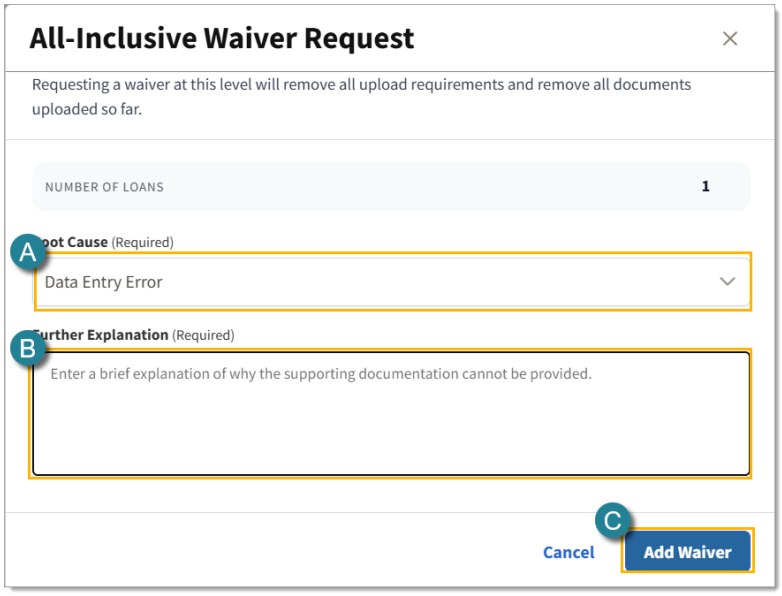
A. Select a **Required Document** from the drop-down menu.
B. Enter a waiver comment in the text box.
C. Click **Add Waiver(s)** and click **Save** to attach the waiver to the request



Request an all-inclusive document waiver

If all requests require a waiver, click **Request All-Inclusive Document Waiver**.

A. Select **Root Cause** from the drop-down menu.
B. Enter an explanation in the text box.
C. Click **Add Waiver** and click **Save** to attach the waiver to the request.



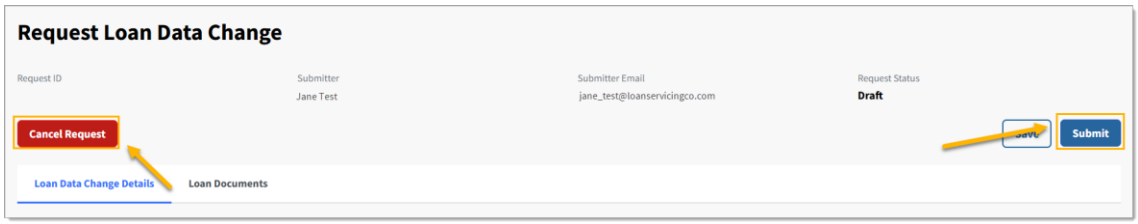
Submit from Draft

Users can submit a request that has been in **Draft** status by selecting it from **Request Activity** on the **Home** screen.

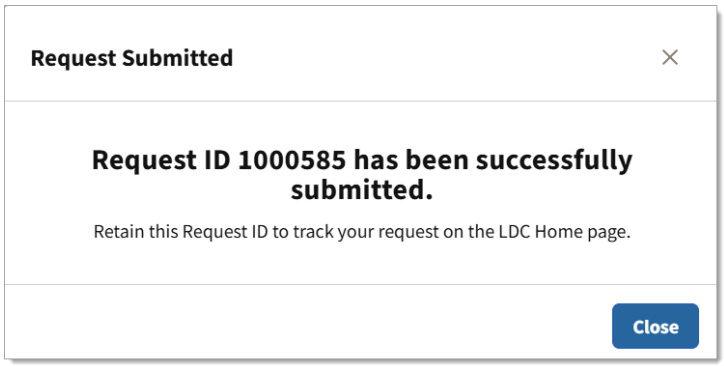
Users can only submit drafts that they created that are associated with their login credentials.

1. Navigate to the **Request Activity** section of the **Home** screen.
2. Locate the draft request.
3. Ensure all required information is completed for the change.
4. Attach any required loan documents or complete a waiver request.
5. Click **Save** between each added document and/or waiver to ensure all documents are added to the request.
6. Click **Submit** when all documents have been saved to the request.

Note: *If a change request was drafted in error, click* ***Cancel Request*** *before saving or submitting it to remove it from the Request Activity log. Previously saved drafts that are later cancelled remain in Request Activity with a* ***Cancelled*** *status.*



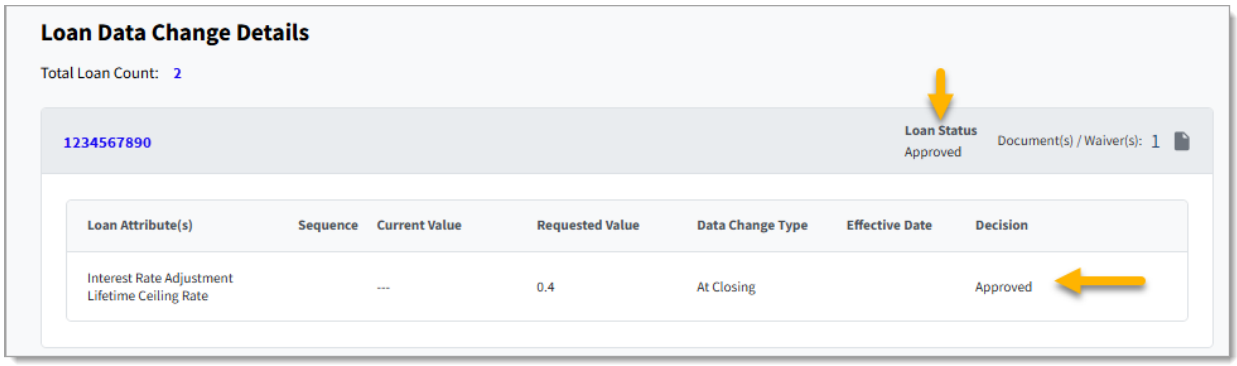
Users will receive messaging notifying them of the successful submission.



Review submitted request

These steps apply whether the request was submitted immediately or from a **Draft**.

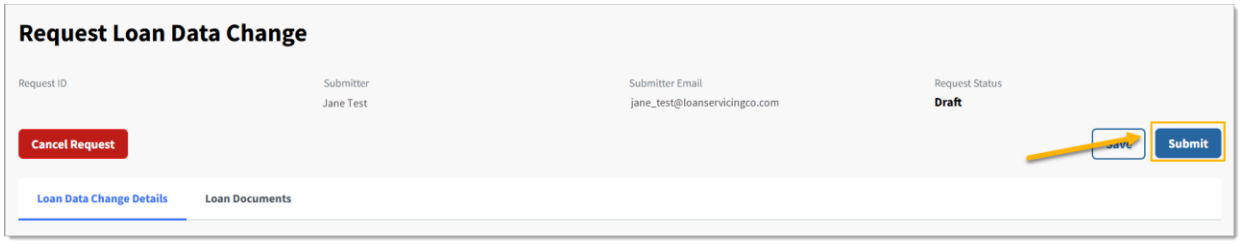
1. Refresh the browser and return to the **Loan Data Change Home** screen to locate the Request ID and review the status in the **Request Activity** section
2. Review the **Loan Data Change Details** on the **View Loan Data Change** screen to confirm that the request was successful or if additional action is needed.



Submit a Single Request

When all loan data change information has been entered, any errors have been corrected and loan documentation or waivers have been provided (if necessary), the request can be submitted.

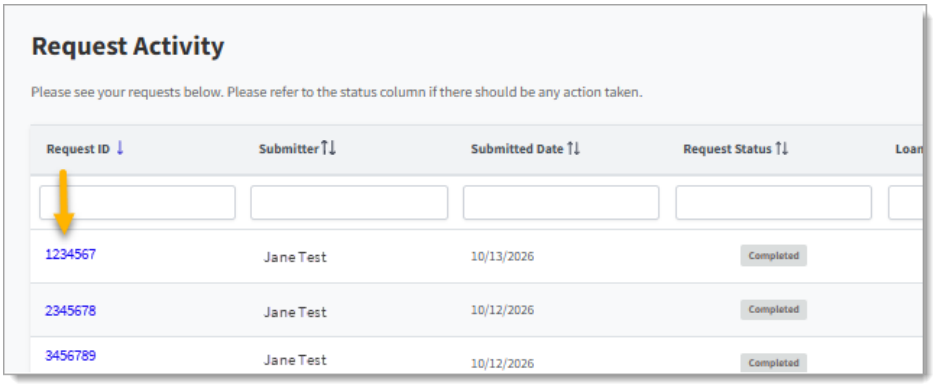
1. Click **Submit**. After submission the request will be read-only, and no further changes can be made.



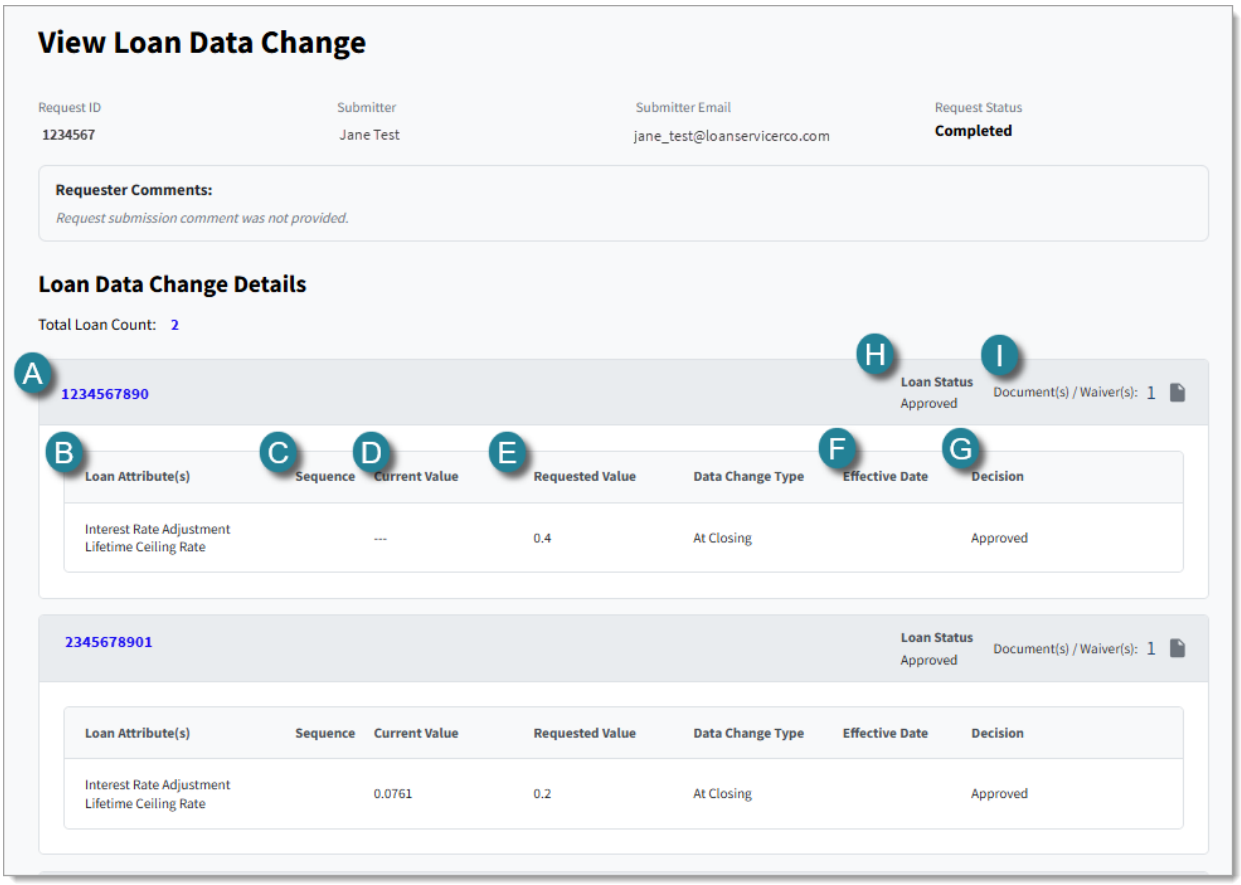
2. Refresh the browser, return to the **Loan Data Change Home** screen and review the request status in the **Request Activity** section

View Loan Data Change Details

Users will track their requests at a detailed level by selecting a Request ID in **Request Activity** on the Home screen. Remember, a Request ID may contain multiple loan numbers and more than one change per loan number, as shown in the examples below.

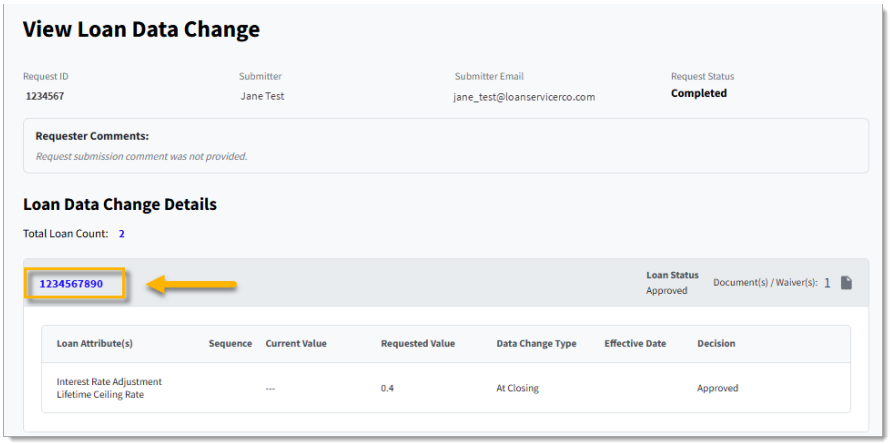


	Field Name	Description
A	Fannie Mae Loan Number hyperlink	10-digit number identifying a Fannie Mae loan that hyperlinks to the Loan Details screen.
B	Loan Attribute	The loan data element included in the change request. ***Note:*** *Display names for attributes and enumerations in the test environment are subject to change prior to going into production.*
C	Sequence	Indicates the order in which multiple changes for the loan were processed by the seller/servicer.
D	Current Value	The current loan attribute value recorded in the Servicing Platform.
E	Requested Value	The new value submitted for the loan attribute.
F	Effective Date	The date the requested loan data change takes effect.
G	Decision	The review outcome for the requested change.
H	Loan Status	The processing status of the requested loan data change.
I	Documents/Waiver(s)	Link to supporting documents or approved waivers associated with the requested change.



Review request decision

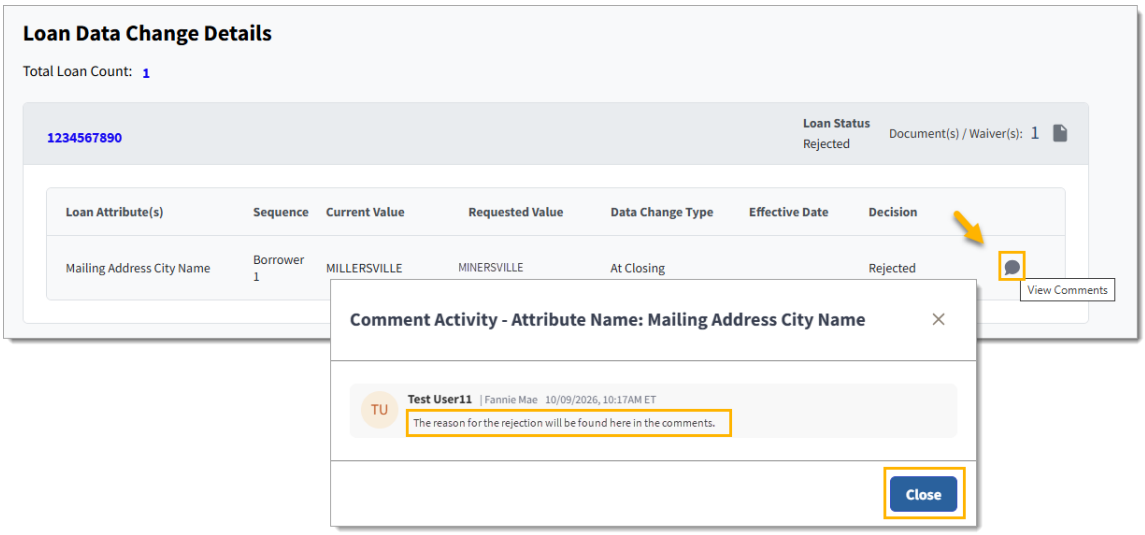
From **Loan Data Change Details**, click the loan number link to open **Loan Details** and verify that approved changes appear in the Servicing Platform.



If any part of a single or bulk request is rejected, review the comment in **Loan Data Change Details** to understand the reason, then submit a new request with the corrected information.

To view the comments:

1. Refresh the browser to ensure the most recent status is reflected.
2. Click the **Comment** icon.
3. Review the reason for the rejected status and repeat the steps to Submit a Single Request.



Loan Details screen

The loan number hyperlink will take the user to the Loan Details screen to confirm that the approved data changes are reflected within the Servicing Platform.

The Loan Details screen is shared across all Servicing Platform applications, allowing users to easily transition between one capability to another, giving a holistic view of Servicing Platform activity.

> ***Note:*** *You may access this screen from any application by entering the loan number in the Loan Number Search in the left-hand navigation panel.*

Revision Log

Document Change History		
Date	Version #	Description
April 8, 2026	Version 1.0	Initial document publication
July 22, 2026	Version 2.0	Minor updates to the Loan Search and Enter Escrow Event Details sections. Updates to user roles in Technology Manager Updates to System Availability information
September 25, 2026	Version 3.0	Adds Setup Event section and clarifying language throughout.
October 14, 2026	Version 4.0	Add Delinquency Reporting section. Moved testing, production criterion and production access roles for Escrow Reporting from the introduction to the Escrow Reporting section.
November 5, 2026	Version 5.0	Add Loan Data Change Management section