Fannie Mae™

DUS Property Monitor
User Guide for Servicers
V21.3

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I.	DUS PROPERTY MONITOR OVERVIEW

DUS Property Monitor is a web-based tool intended to enhance the Green Verification experience for Servicers and Fannie Mae Green Asset Managers by providing workflows to facilitate Verification processes, enhancing transparency through simplified access to information, and enhancing the ability to track and report on Green Property verification-related data.

DUS Property Monitor will:
- Provide an automated system to share Green Verification inspection results
- Allow Servicers to provide Scope Change and Extension requests
- Share Covered Building List information
- Pre-populate compliant and non-compliant work items, allowing Servicers and Fannie Mae Green Asset Managers to interact, share information, and track efforts to remediate findings
- Significantly reduce manual effort involved with managing Green Verification findings for both the Servicer and Fannie Mae Green Asset Managers

Release 1 focused specifically on developing a system to allow Servicers and Asset Managers to manage non-compliance, including sharing of information and documents and tracking of all instances of Verification non-compliance. After Release 1, users of the system will be all Servicers who manage Green Rewards loans, as well as Fannie Mae Green Asset Managers. Bright Power will not interact directly with the system. Servicers will receive information on Bright Power's compliance test results electronically and will be able to systematically respond with a remediation plan for each non-compliant item. Servicers will enter a remediation plan proposal, including uploaded or drag and dropped attachments for Fannie Mae Asset Managers to approve, reject, or ask for more information. Fannie Mae Green Asset Managers will be able to track progress, as entered by the Servicer, throughout the remediation effort. Through notification and alert functionality, both Servicers and Fannie Mae Asset Managers will better track and manage remediation efforts tied to non-compliance. The system will provide a central location for all Verification-related information shared by Bright Power, Fannie Mae Green Asset Managers, and Servicers. Lastly, the export functionality will provide much needed data to support portfolio level analytics.

Release 2 enhanced the DUS Property Monitor workflow focusing on improving the user experience for Servicers and Fannie Mae Asset Managers. Feedback was gathered and several enhancements were made to dashboards, such as mouse hovering expectations and more meaningful column updates. To better structure Servicer & Fannie Mae communication, a plan approval process was added alongside the remediation approval workflow. To support portfolio analytics compliant properties were also added to dashboard views and more data was added to exports. Additionally, Energy and Water Efficiency Measure (EWEM) statuses of compliant, non-compliant, and remediated were also added to deepen the view into a non-compliant property.

Release 3 was primarily focused on building out time extension and scope change request workflows in DUS Property Monitor to continue to decrease Servicer MAMP reliance. A new Scope Change and Extension Dashboard was added alongside the existing Property Inspection Dashboard to provide the Servicer flexibility to move inspection dates and update EWEM

commitments from the same system. Additionally, a real-time notification option was added to comments and a new Useful Links section was added to the homepage.

Release 21.3 upgraded DUS Property's Monitor technology architecture to deploy alongside DUS360, which is Fannie Mae's target state Asset Management System. Style and color palettes were updated to match the DUS360 look and feel. The main functionality delivered was an 'Other Green Requirements' Dashboard, where Fannie Mae Green Asset Managers will receive inspection forms directly from Servicers to review and approve before sending to Bright Power (via Box.com). Bright Power will continue to create the M&V report and upload to DPM/DUS360 as they do today, but we are moving the inspection requirement from Bright Power directly to Servicers. Note the Other Green Requirements Dashboard will also track the Covered Building process. Additionally, Servicer Contact Details were added to Detail pages, and Loan Origination Date was made available in the Property Inspection Detail Page.

1. Accessing DUS Property Monitor

1.1. Users can access DUS Property Monitor through one of the following means:

- Directly launch DUS Property Monitor at the following address: https://dusassetmonitor.fanniemae.com
- From the MAMP Home Page, click on the link for DUS Property Monitor

1.2. Enter your Fannie Mae User ID and Password and click "Sign On"
- After 3 consecutive unsuccessful login attempts, the User ID will be locked, and you will need to contact the support line at 1-800-2FANNIE to have your User ID unlocked
- After a successful login you will be directed to the Dashboard View Page of DUS Property Monitor.

1.3. DUS Property Monitor is compatible with Chrome version 45+, Edge version 12+, and IE version 11+ browsers.

1.4. DUS Property Monitor leverages Single Sign-On capability, so your current Fannie Mae credentials (username and password) will allow you to access this application as well. Users will also be able to directly access DUS Property Monitor through a link in the Multifamily Asset Management Portal (MAMP).

1.5. New User Requests: New Users should request access to DUS Property Monitor online, through Fannie Mae Technology Manager at the following address: https://www.fanniemae.com/singlefamily/technology-manager

Setup through Fannie Mae Technology Manager is required. Unauthorized users will receive an exception notification based on the following:

If an authenticated and authorized external user with valid role(s), but does not have any seller servicer numbers associated: **"You have not been setup with a valid seller servicer number to access this application. Please contact your Technology Manager Administrator with this error message"**.

If an authenticated and authorized external user with valid role(s), but no inspections associated: **"No Inspection records to show at this time."**

If an authenticated and unauthorized external or internal user: **"System error occurred. Please ensure you have proper access set up. Servicer users should verify access with your Technology Manager Administrator. Fannie Mae users should verify/ request access in IAG. Please contact your Technology Manager Administrator with this error message."**

1.6. **DUS Property Monitor times out after 30 minutes of inactivity; any unsaved data will be lost after 30 minutes of inactivity.**
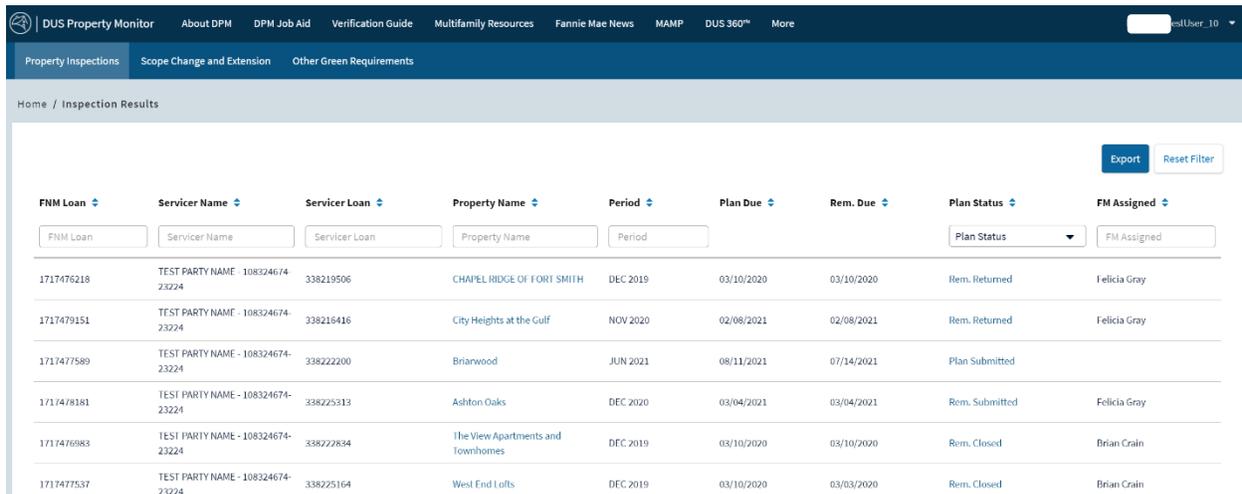
III. USING DUS PROPERTY MONITOR

1. Home Page

1.1. Upon logging in, the Servicer will land on the 'Property Inspections' Dashboard, and will have the option of accessing the 'Scope Change and Extension' Dashboard or the **'**Other Green Requirements' Dashboard.

1.2. Useful Links are also provided and will be maintained in the top row throughout:
1. **About DPM** – link to Fannie Mae Applications & Technology web page for DUS Property Monitor
2. **DPM Job Aid** – link to this document
3. **Verification Guide** – link to the Servicer's Guide to Green Mortgage Loan Verification
4. **Multifamily Resources** – link to Fannie Mae Multifamily website
5. **Fannie Mae News** – link to Fannie Mae Newsroom website
6. **MAMP** – link to Multifamily Asset Management Portal
7. **DUS360** – link to DUS360

2. Property Inspection Dashboard View

Figure 1

2.1. The 'Property Inspection Dashboard is shown above in Figure 1. This view shows all properties inspected by Bright Power. The initial Plan Statuses are "Compliant" if the property was compliant and "Plan Required" if at least one instance of non-compliance was observed.

2.2. The following fields are included on this Property Inspection Dashboard View. Note by hovering over any of the field headers a description is available.

1. **FNM Loan #** - A unique 10-digit number assigned to a Fannie Mae loan. Can be filtered by entering all or any part of a loan number in the box under the field name
2. **Servicer Name** - Each user as a given Servicer will see all properties assigned to that Servicer (and only those for their company)
3. **Servicer Loan #** - A unique number assigned by a Servicer for a loan. Can be filtered by entering all or any part of a loan number in the box under the field name
4. **Property Name** – The name of the property which has been inspected. Can be filtered by entering all or any part of a Property Name in the box under the field name, or can be sorted in ascending or descending order by clicking the arrows by the field name once for ascending, or twice for descending order
5. **Period** – Shows the month and year the property inspection report was provided to Fannie Mae. Can be filtered by entering all or part of a month and year in the box under the field name, or can be sorted in ascending or descending order by clicking the arrows by the field name once for ascending, or twice for descending order
6. **Plan Due** – Shows the date the remediation plan is due to be submitted to Fannie Mae. This is a system generated date 30 days after loan closing. Will be empty if compliant. Can be sorted in ascending or descending order by clicking the arrows by the field name once for earliest first, or twice for most recent first
7. **Remediation Due** – Shows the date by which remediation steps laid out in the remediation plan must be completed. In some cases, a remediation inspection will be required to confirm that the remediation is complete. This is a servicer input date and will be empty if the property plan status is compliant or plan required. Can be sorted in ascending or descending order by clicking the arrows by the field name once for earliest first, or twice for most recent first.
8. **FM Assigned** – If populated, will show the Fannie Mae Asset Manager assigned to the property. This will be populated only by FNM and will be read-only from the Servicer side, where only internal FNM users with permissions will have the ability to assign.
9. **Plan Status** – Shows the status of the remediation. Note that clicking on a property Plan Status will open an audit trail window, displaying the history of status changes by usernames, user types, and date time stamps.
   - "**Compliant**" – After inspection no further action needed
   - "**Plan Required**" – After inspection Fannie Mae is awaiting submission of a remediation plan from the Servicer
   - "**Plan Submitted**"– A remediation plan has been submitted from the Servicer to Fannie Mae for review
   - "**Plan Returned**" – Fannie Mae has returned the plan to the Servicer for changes or additional information
   - "**Plan Approved**" – Fannie Mae has approved the remediation plan.
   - "**Remediation Submitted**" – Evidence of the remediation has been submitted to Fannie Mae for review
   - "**Remediation Returned**" – Fannie Mae has requested additional information regarding the remediation evidence
   - "**Remediation Closed**" – Fannie Mae has approved the remediation, and ensured all underlying EWEMs are either compliant or remediated

▪ "**Remediation Cancelled**" – The loan was liquidated. If the property was compliant or if a successful Remediation took place before liquidation the Plan status would remain "Compliant" or "Remediation Closed," but all other statuses would transition to "Remediation Cancelled" upon liquidation.

2.3. Note additional fields not visible on the Property Inspection Dashboard are available through export:

1. **Inspection ID** – This is the Bright Power identifier for the property inspection
2. **Collateral ID** – This is the Bright Power identifier for the property
3. **Original Estimated Energy Savings –** The energy savings in dollars expected for year 1 of the project.
4. **Projected-Verified Energy Savings –** The energy savings in dollars calculated for that specific year of the project, based on verification activities conducted during the performance period.
5. **Original Estimated Energy Savings kBTU –** The energy savings in kBTU expected for year 1 of the project.
6. **Projected-Verified Energy Savings kBTU –** The energy savings in kBTU calculated for that specific year of the project, based on verification activities conducted during the performance period.
7. **Original Estimated Water Savings –** The water savings in dollars expected for year 1 of the project.
8. **Projected-Verified Water Savings –** The water savings in dollars calculated for that specific year of the project, based on verification activities conducted during the performance period.
9. **Original Estimated Water Savings kGal -** The water savings in kGal expected for year 1 of the project.
10. **Projected-Verified Water Savings kGal –** The water savings in kGal calculated for that specific year of the project, based on verification activities conducted during the performance period.

2.4. Action Buttons on the Property Inspection Dashboard View:

1. **Reset Filter** – This button reverts to the default view, unsorted and unfiltered
2. **Export** – This button exports the contents of the dashboard to Excel for simplified entry into Servicer systems or offline analysis and manipulation. The export on the initial dashboard results in 3 tabs – Property Inspection Findings, EWEM Level Findings, and User Comments.
3. **Logout** button is also located at the top right of the page where the user can click their ID and be prompted with an option to Logout.
4. **Pagination** (below the dashboard) – The Default View shows 50 properties on a page. With pagination controls at the bottom of the page, this view can be changed to show 250 or 500 properties, and users can navigate to other pages

3. Remediation Detail View

Figure 2

3.1. By clicking on any of the properties in the Servicer Dashboard View, you will arrive at the Remediation Detail View (see Figure 2 above). This view provides detailed inspection results for each property and allows for tracking of progress toward submitting and receiving approval for a remediation plan. Ongoing remediation activities and other correspondence can be tracked via a comments section at the bottom of the page.

3.2. Information displayed on the Remediation Detail View (numbers below correspond to markers in the above screenshot, Figure 2). Note by hovering over any of the field headers a description is available.

1. **Property Inspection Overview**: This row of information provides some identifying information about the Property Inspection from the Dashboard View, including the FNM Loan Number, Servicer Loan Number, Property Name, Loan Origination Date, Site Visit Date, Period (inspection report month and year), Notice Date, Plan Due Date, Units Inspected, Plan Status, and Remediation Due Date.

2. **Servicer Contact Details**: This row allows the Servicer to input their name, email, phone number, and a notification email associated with the Scope Change or Extension Request. Note this is editable for Servicers only when their Submit button is Active.

3. **Energy and Water Efficiency Measure (EWEM) Level Information**: This table shows detailed inspection findings at the EWEM level. Both compliant and non-

compliant EWEMs are visible where an EWEM status of Compliant or Non-compliant is reflected. An EWEM status of Exception is also available for Fannie Mae Asset Managers to document follow ups in determining if an EWEM is compliant or non-compliant. Note the Exception EWEM status is an internal Fannie Mae concept and does not block acceptance of the overall remediation. The table shows the EWEM Name from the 4099h and High Performance Building (HPB) report; the Description of the EWEM from both the 4099h/HPB report and the Schedule 6, the number of items inspected, the percent of those inspected that were compliant, the specific units found to be non-compliant, the total number of tests performed (there may be more than one test per unit or common area inspected), and a detailed description of the result of the inspection for each EWEM. Note additional EWEM fields are available in export functionality depicted above in section 2.3.

4. **File Repository / Uploads**: Documents can be uploaded here by either Fannie Mae or Servicers by clicking the 'Upload Documents' button and uploading. Files may also be dragged and dropped. As examples of expected documentation for this area, Fannie Mae can add inspection detail, such as photographs, and Servicers can upload Remediation Plans and evidence of remediation, such as invoices for completed work. Any relevant email conversations should also be attached.

5. **Plan and Remediation Status Action Buttons**: The Remediation Plan Status can be changed using the buttons in this area of the Remediation Detail View. Available buttons will be blue, and those not available based on the current status will be not be visible. Information on when to select each button and the action taken when each button is selected can be found in the following Section of this guide, Submitting Remediation Plans and Tracking Remediation Efforts.

6. **Comments**: The Comments field captures comments made by any user at the property level. Servicers and Fannie Mae Green Asset Managers can ask questions of each other, share information, or capture progress of the remediation effort in this field. The most recent comment shows at the top, but all comments are retained and shown. When comments are entered selecting the Send Email Notification box will send the comment as a real time notification to the respective party.

7. **Back:** Clicking Back will return the user to the Dashboard View.

8. **Create Post Scope Change Request Action Button**: After an inspection has occurred the Servicer can request a Post Scope Change Request by clicking the button to submit a request to update the initially agreed upon EWEMs post-inspection. After clicking the button, a confirmation window appears to confirm the creation of this request. After confirming OK, a record of the Post-Scope Change Request will appear in the Scope Change and Extension Dashboard detailed in section 5. Note when creating requests there is no validation to prevent request duplication currently.

4. Submitting Remediation Plans and Tracking Remediation Efforts

4.1. DUS Property Monitor allows Servicers to submit remediation plans for approval to Fannie Mae and monitor the status of those approvals, using the following steps:

1. When Bright Power's property inspection results are loaded into DUS Property Monitor by Fannie Mae, the initial status for non-compliant properties will be "Plan Required."
2. If you have questions or need more information regarding an inspection, you can enter a comment in the Comments field.
3. Once the borrower has agreed to a Remediation Plan, the servicer can upload the plan by attaching any relevant documents in the File Repository, then clicking the Status Action Button for "Submit Plan" for approval. That will change the status to "Plan Submitted."
4. Once Fannie Mae reviews the Remediation Plan, it will be moved to one of two statuses: "Plan Returned," if the plan requires additional information or does not meet requirements; or "Plan Approved."
5. If the plan is not approved and the status shows "Plan Returned," a comment in the Comments area will indicate specifically what did not meet requirements or what additional information is required to approve the plan.
6. If the plan is approved, the status will reflect "Plan Approved," and the Servicer can advise the borrower that they may proceed with remediation.
7. Once the borrower has completed the remediation, the servicer can upload any relevant documentary evidence in the File Repository, then click the Status Action Button for "Submit Remediation for Approval." That will change the status to "Remediation Submitted"
8. Once Fannie Mae reviews the Remediation, it will be moved to one of two statuses: "Remediation Returned" if the remediation requires additional information or does not meet requirements; or "Remediation Approved."
9. If the remediation is not approved, and the status shows "Remediation Returned," a comment in the Comments area will indicate specifically what did not meet requirements or what additional information is required to approve the remediation.
10. If the remediation is approved, the status will reflect "Remediation Closed." As part of approving and closing the remediation, Fannie Mae will ensure all EWEMs have an EWEM Status of either "Compliant," "Remediated" or "Exception."
11. Note for simple or delayed remediations where a plan confirmation is not needed, the Servicer can bypass the "Submit Plan" for Approval button and go straight to the "Submit Remediation" for Approval button.

5. Scope Change and Extension Requests Dashboard View

Figure 3

5.1. The 'Scope Change and Extension Dashboard' is shown above in Figure 3. This view shows all loans and properties for each Servicer that have requested a time extension or scope   change.

5.2. The following fields are included on this 'Scope Change and Extension Dashboard' view. Note by hovering over any of the field headers a description is available:

1. **FNM Loan** - A unique 10-digit number assigned to a Fannie Mae loan. Can be filtered by entering all or any part of a loan number in the box under the field name
2. **Servicer Name** - Each user as a given Servicer will see all properties assigned to that Servicer (and only those for their company)
3. **Servicer Loan** - A unique number assigned by a Servicer for a loan. Can be filtered by entering all or any part of a loan number in the box under the field name
4. **Property Name** - The name of the property which has been inspected. Can be filtered by entering all or any part of a Property Name in the box under the field name, or can be sorted in ascending or descending order by clicking the arrows by the field name once for ascending, or twice for descending order
5. **Request ID** – A DUS Property Monitor generated identifier created for each scope change or extension request
6. **Request Type** – Shows the type of request that was submitted. Allowable values are 'Due Date Extension,' 'Pre-Verification Scope Change,' and 'Post-Verification Scope Change'
7. **Request Status** – Shows the current status of the request. Note clicking on the status field will provide an audit trail.
   - **"Created"** – The Servicer has created a scope change or extension request
   - **"Submitted"** – The Servicer has attached all documents and submitted a scope change or extension request to Fannie Mae for approval.

- **"Notified-Closed"** – The Servicer has submitted a delegated due date extension request that has been accepted by Fannie Mae.
- **"Returned-Open"** – Fannie Mae has returned the request to the Servicer for changes or additional information.
- **"Rejected-Closed"** – Fannie Mae has rejected the request from the Servicer.
- **"Approved-Pending-Document"** – Fannie Mae has accepted a Pre-Scope or Post-Scope Request and is waiting for the Servicer to upload the Revised Schedule 6 reflecting the newly accepted EWEMs.
- **"Approved-Document-Received"** – The Servicer has uploaded the Revised Schedule 6 for accepted Pre-Scope or Post-Scope Requests.
- **"Approved-Closed"** – Fannie Mae validates and approves the revised Schedule 6 for Pre-Scope and Post-Scope requests or has approved a Non-delegated Due Date Extension Request. This is the final accepted state for all requests outside of Delegated Due Date Extensions which end at Notified-Closed.

5.3. Action Buttons on the 'Scope Change and Extension Dashboard' view (note numbers below correspond to markers in Figure 3 above):
1. **Reset Filter** – This button reverts to the default view, unsorted and unfiltered
2. **Export** – This button exports the contents of the Scope Change and Extension Dashboard to Excel for simplified entry into Servicer systems for offline analysis and manipulation. The export on the initial dashboard results in 2 tabs – Scope Changes and Extensions, and User Comments.
3. **Logout** – located at the top right of the page where the user can click their ID and be prompted with an option to Logout.
4. **Create Request** – This button allows the Servicer to submit a Scope Change or Extension request, with steps detailed below.

5.4. Scope and Extension Dashboard Create Request Button - Searching for the Loan and Creating the Request (numbers correspond to markers in Figures 4 and 5 below)

Figure 4

1. **Loan or Property Lookup Page**: Clicking on the Create Request button will take the user to a search page to lookup the loan or property shown above in Figure 4. Multiple or single search criteria may be utilized, including Property Name, Fannie Mae loan identifiers, and Servicer loan numbers.
2. **Reset Filter**: This button reverts to the default view, unsorted and unfiltered
3. **Clicking Search**: Fannie Mae and Servicer loan numbers must be entered exactly whereas Property Name can be partially entered to return results after clicking Search.
4. **Search Results**: After clicking Search the results are populated below the search box. When the loan or property is identified the white box in the left-most row can be clicked and a check will appear.
5. **Clicking Next**: A single loan or multiple loans may be selected, and the user can click Next to proceed.

Figure 5

6. **Create Request Page**: After clicking Next the user is taken to a subsequent Create Request page shown above in Figure 5.
7. **Request Type Dropdown**: The selected loan or properties will now have Request Type dropdown options of "Pre-Scope Change" or "Due Date Extension." The Create Request Page from the Scope and Extension Dashboard assumes that loan or property inspection has yet to occur. If inspection has already occurred, a Post-Scope Change request can be submitted from the Property Inspection Dashboard's Remediation Detail Page (Section 3.2 #8). Note there is no validation here so if inspection has occurred it will be a Servicer responsibility to ensure they submit a Post-Scope Change from the Remediation Detail page.
8. **Clicking Create**: After clicking Create if a single request was created the user is navigated to the Request Detail page for that loan to proceed to submission. If multiple requests were created the user is navigated back to the Scope Change and Extension Request Dashboard where the newly created requests can be seen with a Request Status of Created. For each request, clicking on a Property Name takes the user to the Request Detail page where files can be uploaded and submitted to Fannie Mae for approval (Section 6). Note when creating requests there is no validation to prevent request duplication currently.

5.5. Note additional fields not visible on the Scope Change and Extension Dashboard are available through export:

1. **New Due Date –** This row will populate with the latest accepted Extension Request due date. If no Extension requests have been processed for a loan or property, then this will be blank.
2. **Delegated** – This row will populate Y or N depending on if the Extension Request is delegated (Y) or non-delegated (N). If no Extension request was processed for a loan or property, then this will be blank.
3. **Status Date** – This row will show the date the Request Status was updated.

6. Request Detail View

Figure 6

6.1. By clicking on any of the loans or properties in the Scope Change and Extension Dashboard View, you will arrive at the Request Detail View (see Figure 6, above). Information displayed on the Request Detail View is detailed below (numbers below correspond to markers in the above screenshot).

1. **Request Overview**: This row of information provides some identifying information for the selected loan and the latest Request Status.
2. **Servicer Contact Details**: This row allows the Servicer to input their name, email, phone number, and a notification email associated with the Scope Change or Extension Request. Note this is editable for Servicers only when their Submit button is Active.
3. **Delegated Indicator and New Due Date**: Note for Extension requests in Created state, the Servicer will have to provide a Delegated Indicator and requested Due Date alongside submission. The Delegated column has dropdown options of "Yes" or "No," and the New Due Date can be entered directly in the MM/DD/YYYY field. Note for Scope Change requests these additional columns will not be present.

4. **Submit Action Button**: After attaching relevant documents to a request in Created status, clicking the Submit button advances the Request Status to Submitted and moves the request to Fannie Mae for decisioning. For approved scope changes the Servicer can also upload and submit the revised Schedule 6 similarly, moving the request status from approved-pending-document to approved-document-received (full workflow details in Section 7).

5. **File Repository / Uploads**: Documents can be uploaded here by Servicers by clicking the 'Upload Documents' button and uploading. Files may also be dragged and dropped.

6. **Comments**: The Comments field captures comments made by any user at the request level. Servicers and Fannie Mae Green Asset Managers can ask questions of each other, share information, or capture progress of the request in this field. The most recent comment shows at the top, but all comments are retained and shown. When comments are entered selecting the Send Email Notification box will send the comment as a real time notification to the respective party.

7. **Back**: To return to the Dashboard View, click on the Fannie Mae logo on the top left or click on the Home button.

7. Submitting and Tracking Scope Change and Time Extension Requests

7.1. DUS Property Monitor allows Servicers to submit scope change and time extension requests to Fannie Mae as well as monitor the status of those approvals using the following steps:

Scope Changes
1. After the Servicer creates a Pre-Scope Change Request pre-verification from the Scope Change and Extension Dashboard or a Post-Scope Change Request post-verification from the Remediation Detail page, the Request Status will reflect an initial state of "Created."

2. After the Servicer attaches the relevant documents in the file repository, clicking Submit will submit the request to Fannie Mae for acceptance and update the Request Status to "Submitted."

3. Once Fannie Mae reviews the Scope Change request it will be moved to one of three statuses: "Returned Open" if the request requires additional information, "Rejected Closed" if the request does not meet requirements, or "Approved-Pending-Document" if the scope change request is accepted by Fannie Mae.

4. After the Scope Change Request is accepted by Fannie Mae the Request Status will update to "Approved-Pending-Document." At this point the Servicer will Upload and Submit the Revised Schedule 6 reflecting the newly accepted EWEMs. After Submitting the Revised Schedule 6 the Request Status will update to "Approved-Document-Received."

5. Once Fannie Mae reviews and approves the Revised Schedule 6 clicking Approve again will update the Request Status to "Approved-Closed."

Time Extensions / Due Date Extensions

1. After the Servicer creates a Due Date Extension Request from the Scope Change and Extension Dashboard, the Request Status will reflect an initial Request Status of "Created."

2. After the Servicer attaches relevant documents in the file repository clicking Submit will submit the request to Fannie Mae for acceptance and update the Request Status to "Submitted." Note Extension requests will require the Servicer to provide the due date being requested and a Delegated Indicator alongside submissions.

3. When Submitting the Extension Request if the Servicer designates that the request is Delegated (Delegated Indicator = Yes) then the Request Status will update to "Notified-Closed," representing Fannie Mae's successful acknowledgement of the delegated extension.

4. When Submitting the Extension Request if the Servicer designates that the request is Non-Delegated (Delegated Indicator = No) then the normal workflow takes place.

5. Once Fannie Mae reviews the Non-Delegated Extension Request it will be moved to one of three statuses: "Returned Open" if the request requires additional information, "Rejected Closed" if the request does not meet requirements, or "Approved-Closed" if the scope change request is accepted by Fannie Mae.

8. Other Green Requirements Dashboard View

Figure 7

8.1. The 'Other Green Requirements' Dashboard is shown above in Figure 7.

8.2. The following fields are included on this 'Other Green Requirements' Dashboard view. Note by hovering over any of the field headers a description is available:

1. **FNM Loan** - A unique 10-digit number assigned to a Fannie Mae loan. Can be filtered by entering all or any part of a loan number in the box under the field name

2. **Servicer Name** - Each user as a given Servicer will see all properties assigned to that Servicer (and only those for their company)

3. **Servicer Loan** - A unique number assigned by a Servicer for a loan. Can be filtered by entering all or any part of a loan number in the box under the field name

4. **Master Property** – A unique number assigned by the Master Property Number

5. **Property Name** - The name of the property which has been inspected. Can be filtered by entering all or any part of a Property Name in the box under the field name, or can be sorted in ascending or descending order by clicking the arrows by the field name once for ascending, or twice for descending order

6. **Record ID** – This is the ID for the Other Green Requirements Request

7. **Record Type** – The Other Green Requirements Request Type, which will be either Verification Inspection, Covered Building, or Exception.

8. **Reporting Period** – The month/year of the other green requirements request.

9. **Record Status** – The current status of the other green requirements request.

8.3. Action Buttons on the 'Other Green Requirements' Dashboard Page (note numbers below correspond to markers in Figure 7 above)

1. **Create New -** After clicking Create New the user is taken to a Search page to target loans or properties to create the request or requests for.

2. **Export -** This button exports the contents of the Other Green Requirements Dashboard to Excel for simplified entry into Servicer systems for offline analysis and manipulation. The export on the initial dashboard results in 2 tabs – Other Green Requirements and User Comments.

3. **Reset Filter -** This button reverts to the default view, unsorted and unfiltered

8.4. Other Green Requirements Dashboard Create New Button - Searching for the Loan and Creating the Request (Figure 8 below)

Figure 8

1. **Loan or Property Search Criteria** – The Create New button will take the user to a search page to lookup the loan or property, seen above. Multiple or single search criteria may be utilized, including Property Name, Fannie Mae loan identifiers, Servicer loan numbers, and Master Property numbers.

2. **Reset Filter** – This button reverts to the default view, unsorted and unfiltered

3. **Back** – navigates the user back to the Other Green Requirements Dashboard
4. **Search** - After clicking Search the results are populated below the search box. When the loan or property is identified the white box in the left-most row can be clicked and a check will appear.
5. **Clicking Next** - A single loan or multiple loans may be selected, and the user can click Next to proceed.

8.5. After Selecting and Clicking Next, the user is taken to a subsequent Create Request Page (Figure 9 below)
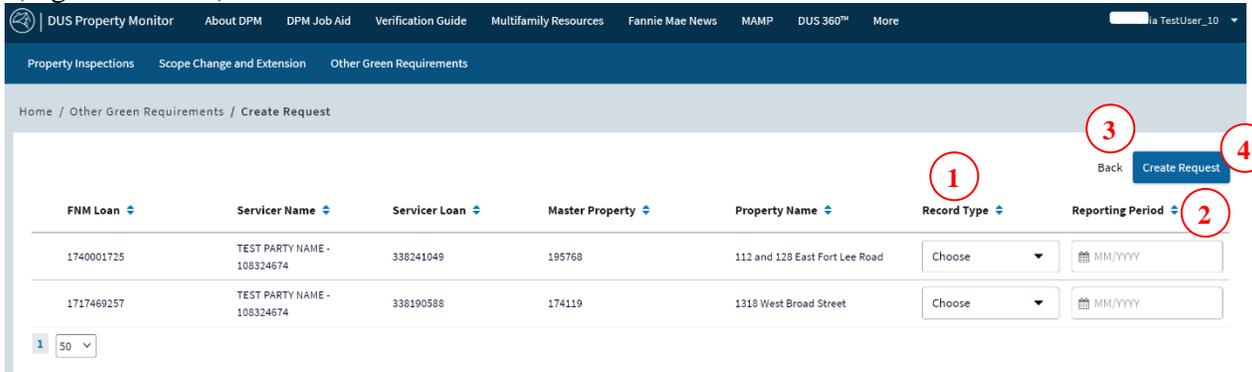
Figure 9

1. **Record Type Dropdown** – The Servicer can select either 'Verification Inspection,' 'Covered Building,' or 'Exception.' Note the Exception Record Type is used to handle duplicate deliveries for the same loan or property within 6 months.
2. **Reporting Period** – The Servicer can click in the field and navigate to select the applicable reporting period
3. **Back** – navigates the user back to the Other Green Requirements Selection Page
4. **Create Request** – After populating the above required fields and clicking Create, there will be a confirmation window where confirming OK will create the records in an "Initial" status.

8.6. Other Green Requirements Request Detail Page

Figure 10

1. **Request Overview**: This row of information provides some identifying information for the selected loan or property alongside the latest Request Status. Note clicking the Request Status will provide an audit trail.

2. **File Repository / Uploads**: Documents can be uploaded here by Servicers by clicking the 'Upload Documents' button and uploading. Files may also be dragged and dropped.

3. **Comments**: The Comments field captures comments made by any user at the request level. Servicers and Fannie Mae Green Asset Managers can ask questions of each other, share information, or capture progress of the request in this field. The most recent comment shows at the top, but all comments are retained and shown. When comments are entered selecting the Send Email Notification box will send the comment as a real time notification to the respective party.

4. **Submit Action Button**: After uploading relevant documents and comments, clicking Submit will update the Request Status from Initiated to Submitted

5. **Cancel Action Button**: The Servicer can cancel the request with the Cancel button, uploading any relevant documents or entering any relevant comments alongside the cancellation.

6. **Back:** navigates the user back to the Other Green Requirements Dashboard

9. **Submitting and Tracking Other Green Requirements Requests**
   1. The Servicer will create their Other Green Requirements Request and it will open in an "**Initiated**" status

2. On the Other Green Requirements Request Detail Page, the Servicer will upload relevant documentation and enter any comments and click Submit, which will transition the Request Status to "**Submitted**"

3. The Fannie Mae Green Asset Manager can see the submitted request on the FNM Other Green Requirements Dashboard. Clicking on the loan will bring up the Request Detail page, where FNM will have the option to Approve / Close or Request Additional Information.

4. When the FNM Green Asset Manager clicks More Info Requested, the Request Status will update to "**Returned**" and the Servicer will be able to see any relevant comments and resubmit.

5. When the FNM Green Asset Manager clicks Close, the Request will update to '**Closed'** or approved.

For any questions that are not answered in this guide, please contact Fannie Mae's Green Asset Management Team at Green_AM@fanniemae.com

Revision History

Date	Version	Description	Author
1/31/2020	1.0	DUS Property Monitor Release 1.0 functionality	Fannie Mae
3/19/2020	2.0	DUS Property Monitor Release 2.0 functionality	Fannie Mae
6/23/2020	3.0	DUS Property Monitor Release 3.0 functionality	Fannie Mae
7/23/21	21.3	DUS Property Monitor Release 21.3 functionality	Fannie Mae