Request Pool Numbers Issuer User Manual

U.S. Department of Housing and Urban Development (HUD)

Ginnie Mae, Mortgage-Backed Securities Issuance and Bond Administration (MBSIBA)

Version 3.3

Ginnie Mae

Application Details

Application Information	Description
Application Name	Request Pool Numbers
Application Acronym	RPN
Ginnie Mae SVP, Sponsor	Victoria Vargas
Ginnie Mae Application Owner	Daniel Boling
Version/Application Release Number	3.2

Document History

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1   INTRODUCTION

This manual is written to provide instructions on how to use the Request Pool Numbers (RPN) application effectively. Issuers will utilize the Request Pool Numbers (RPN) application to request pool numbers and monitor pool number requests. The functional roles associated with the application are issuer and account executive.

Below are links that address common topics that pertain to the Request Pool Numbers (RPN)

- How to get access to MyGinnieMae
- Refer to the MyGinnieMae Getting Started Manual for System Prerequisites
- Accessing the Request Pool Number (RPN) Application
- Key Terms

1.1   Application Overview

Request Pool Numbers (RPN) application is an application in MyGinnieMae used by Issuers to request pool numbers online, download files of pool numbers provided and receive email notification of request status. Issuers can view, download, and print status of requests, available pool numbers, and pool numbers assigned. Issuers can export, view, and print reports.

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1.2 Business Data Workflow

The high-level Business Workflow of the Request Pool Numbers (RPN) application is shown in the figure below:
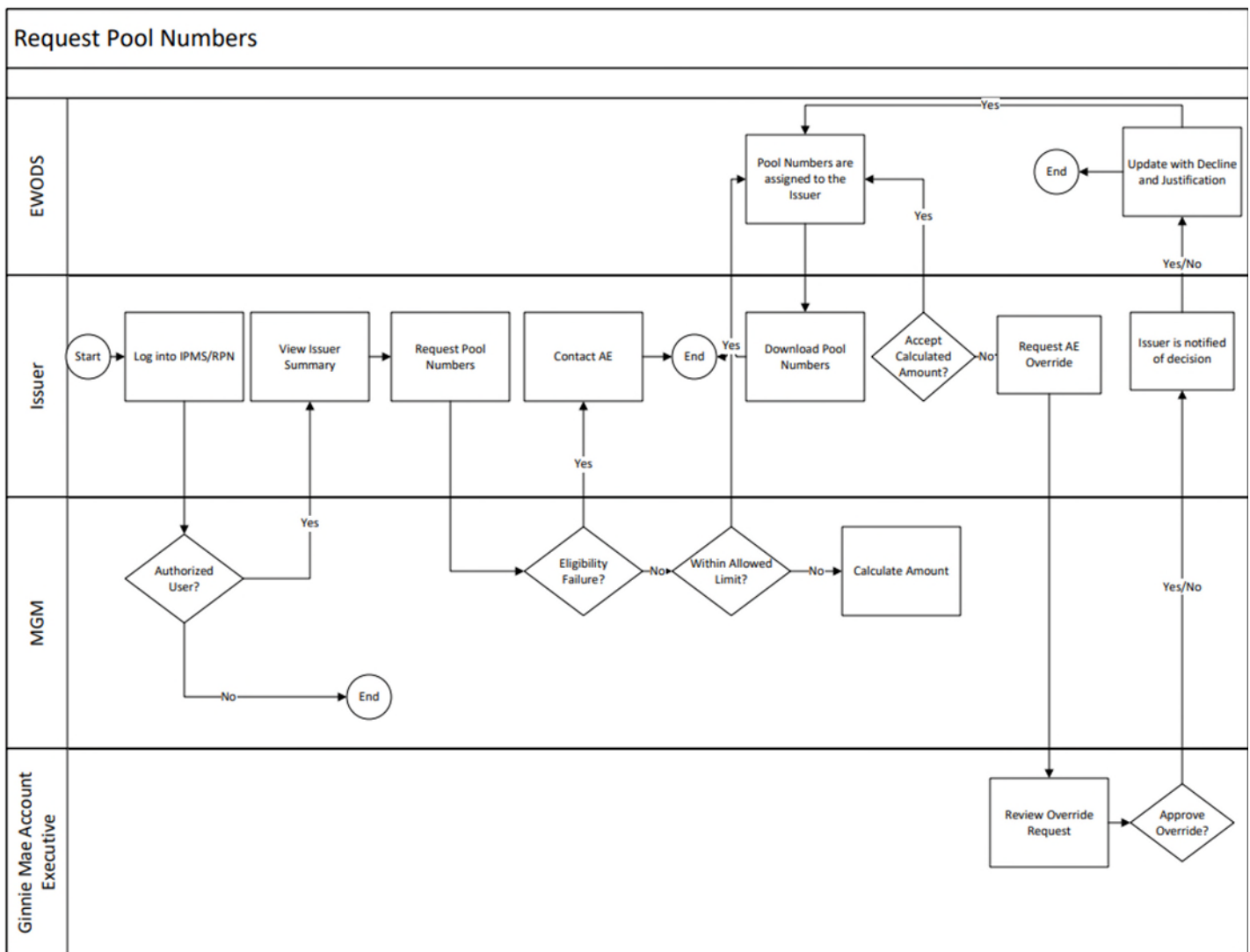
Figure 1 Business Data Workflow

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2 USING THE REQUEST POOL NUMBERS APPLICATION

2.1 Accessing the Request Pool Numbers (RPN) Application

Upon logging onto MyGinnieMae (MGM) the user is presented with My Dashboard, which displays options for navigating the MGM Portal. If the login was successful, the MGM Welcome screen will display:
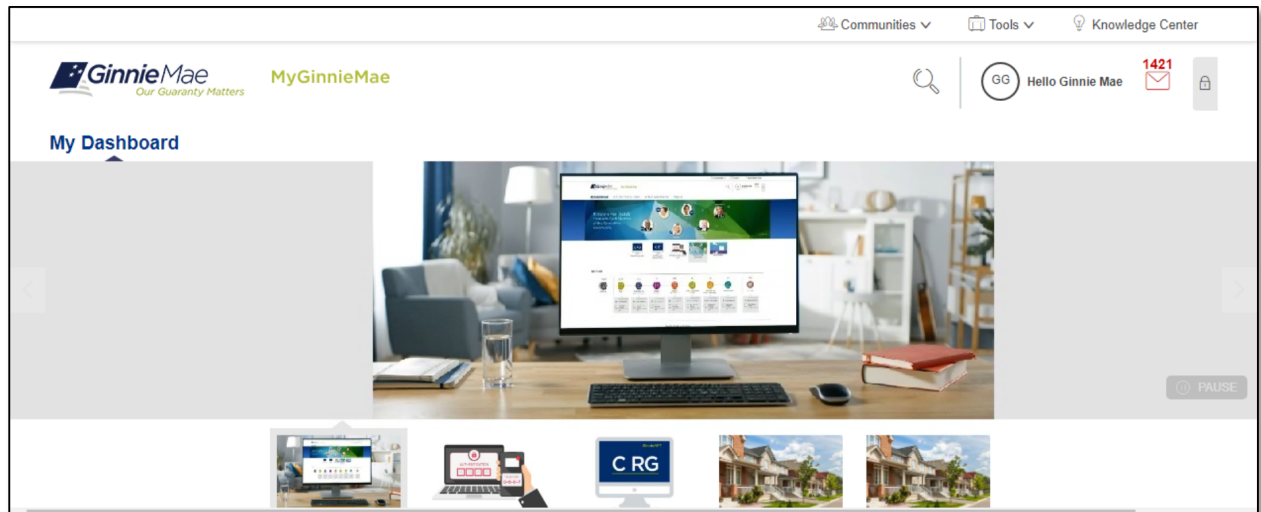

Figure 2 MGM Welcome Screen

2.2 Requesting Pool Numbers

1. From the main screen of the MGM, select **Tools.**

- Select **RPN** from the IPMS drop-down menu.
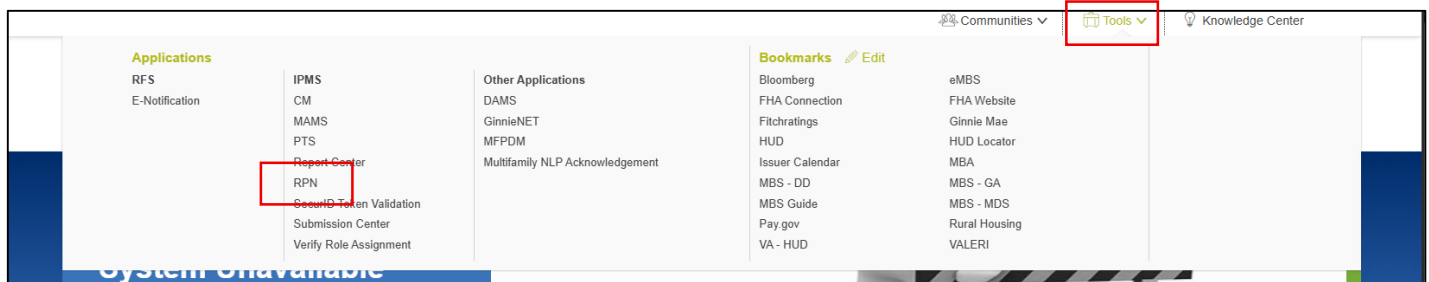
Figure 3 Tools Menu

The **Issuer Summary screen** appears. This screen displays all pool number activity for the requesting Issuer.

Figure 4 Issuer Summary Screen

Field	Description
Requested Date Selection	Select a time span for the request activity. Options are: • Last Month • Last 3 Months • Last 6 Months • Last Year • Date Range
From	If the *Date Range* option is selected in the *Requested Date* selection field, the *From* and *To* fields are activated. Select a start date for the request activity time span. Click the date control to select a date.
To	Select an end date for the request activity time span. Click the date control to select a date.
Status	Select 'All' to view all requests for the date range or select a status (Pending/Approved/Rejected) to filter the requests by that status.
Display	Click the **Apply Filters** button to display the pool number activity for the filter selections.
Requested Date	Date of pool number request.
Request Number	Pool number request number.
Pool Numbers Requested	Number of pools requested.

Field	Description
Quarterly Average	Rolling quarterly average from 12 months prior to date of request of used alphanumeric pool numbers as of the request date.
Pool Numbers Unused	Number of unused alphanumeric pool numbers for the Issuer.
Requested By	Name of requester.
Request Status	Request status.
View Pool Numbers	Download approved pool numbers by clicking the [icon] [icon] [icon] icon in CSV, XML, or Excel format. The file can be saved to a specific location on the Issuer's desktop, opened, or printed.

Table 1 Issuer Summary Screen Fields

1. Expand the ▾ arrow icon next to an Issuer to see the detailed request activity for the Issuer:

Figure 5 Issuer Request Detail Screen

2. To download and save a particular pool request to MS Excel, click the icon to the right of the request:

Figure 6 Excel Pool Download

3. To download and save a particular pool request in XML format, click the ⬛ icon to the right of the request:


```xml
<?xml version="1.0" encoding="UTF-8"?>
- <Pools>
    - <Pool>
          <PoolID>FM4569</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM5176</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM4674</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM4576</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM5083</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM5308</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM4794</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM4724</PoolID>
      </Pool>
    - <Pool>
          <PoolID>FM4451</PoolID>
      </Pool>
```

Figure 7 XML Pool Download

4. To request additional pool numbers for the Issuer(s), click the **Request Pool Numbers** button on the right-hand side of the screen.
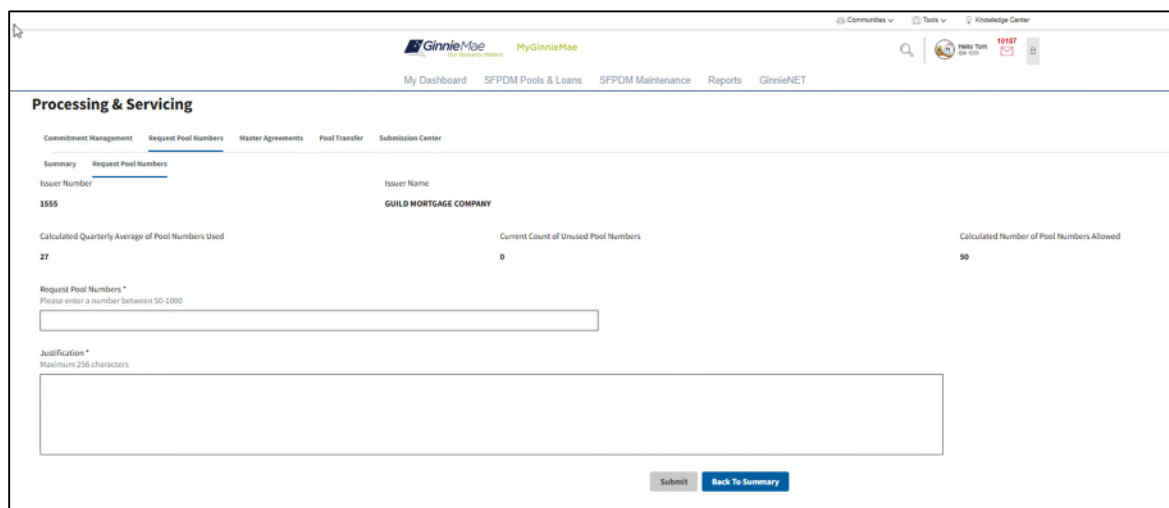
The Request Pool Numbers screen appears:

Figure 8 Issuer Pool Number Request Screen

Field	Description
Calculated Quarterly Average of Pool Numbers Used	Rolling quarterly average from 12 months prior to date of request of used alphanumeric pool numbers as of the request date.
Current Count of Pool Numbers Unused	The count of alphanumeric pool numbers already assigned to the Issuer but not used as of date of request.
Calculated Number of Pool Numbers Allowed	Maximum number of alphanumeric pool numbers allowed by Ginnie Mae for this Issuer.
Request Pool Numbers	Enter the number of alphanumeric pool numbers. A minimum of 50 pool numbers must be requested for SF and 3 for MF
Justification (limit 256 characters)	If the alphanumeric pool number is greater than the number allowed and an Account Executive (AE) override is requested, enter the reason for the override request (256-character limit).

Table 2 Issuer Pool Number Request Screen Fields

5. Click the **Submit** button to submit the request.

6. If the requested number of pools is less than or equal to the Calculated Number of Pools Allowed, the *Approved Request* screen appears:
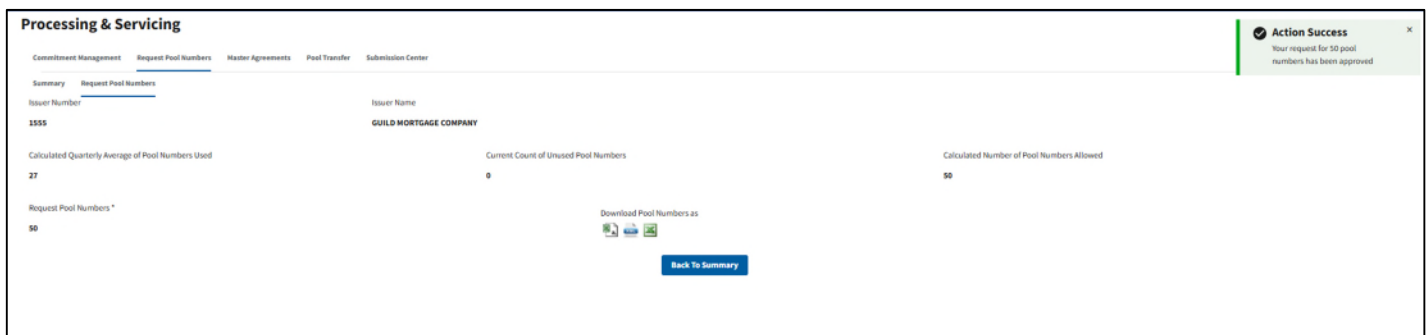

Figure 9 Approved Request Screen

7. Click the button to download the pool numbers in Excel format, the button to download in CSV format, or the button to download in HTML format.

8. Click the **Back to Summary** button to return to the Summary screen.

9. If the Issuer has not met the preconditions and is not in good standing with Ginnie Mae, a message to contact the AE will be displayed:

Figure 10 Unauthorized Issuer Screen

10. If the request is for more than the number of pool numbers allowed, the *Recalculated Request* screen appears:

Figure 11 Recalculated Request Screen

11. Click the **Accept Calculated Number** button to accept the number allowed and download the pool numbers.

12. To request an AE Override of the system-calculated number, enter the justification in the *Justification* field. The justification can be up to 256 characters.

13. Click the ⬚ Request AE Override ⬚ button to initiate a Ginnie Mae AE review and override.

The Pending AE Override Request Confirmation screen appears:

Figure 12 Request Override Confirmation Screen

14. The AE receives notification of pending requests.
15. If the override request is approved, the Issuer receives an email notification of approval, the request appears on the **Issuer Summary** screen, and the Issuer can download the pool numbers.

16. If the override request is declined, the Issuer receives an email notification of the decline, and the **Declined Override Request** screen appears on the Summary screen:

Figure 13 Declined Override Request Screen

17. If the Issuer has available pool numbers equal to or exceeding the quarterly average used, the *Sufficient Pool Numbers Available* screen appears. If more pool numbers are required, the Issuer can submit an AE Override request as previously described or return to the **Issuer Summary** screen.

Figure 14 Sufficient Pool Numbers Available Screen

3 REPORTING

Issuers can request reports via MGM. Reports have the capability to filter, sort, and export to external formats including Microsoft Excel, text, and PDF.

3.1 Report Capabilities

The following reports are available.

Report	Description
Approved Pool Numbers	This report displays the approved pools and the approval date. Issuers can only see the pool information within their portfolio.
Available Pool Numbers	This report displays the pool numbers assigned to a specific Issuer.

Report	Description
Status of Pool Number Requests (Summary and Detail)	This report displays the status (Pending, Approved, or Declined) of an Issuer's AE override requests. A Detail screen displays the request and approval status for individual pool assignment requests. Issuers can only see the pool information within their portfolio.

Table 3 Available Reports

3.2   Report Procedures

Issuers, Ginnie Mae, and PPA Operations can request reports and can filter, sort, and export the data to various formats.

3.2.1   Access

2. Log into the MyGinnieMae (MGM) portal.
● From the main screen of MGM, select Tools.
3. Select Report Center under IPMS.
4. Select the Report Center link.

The Report Center screen appears:
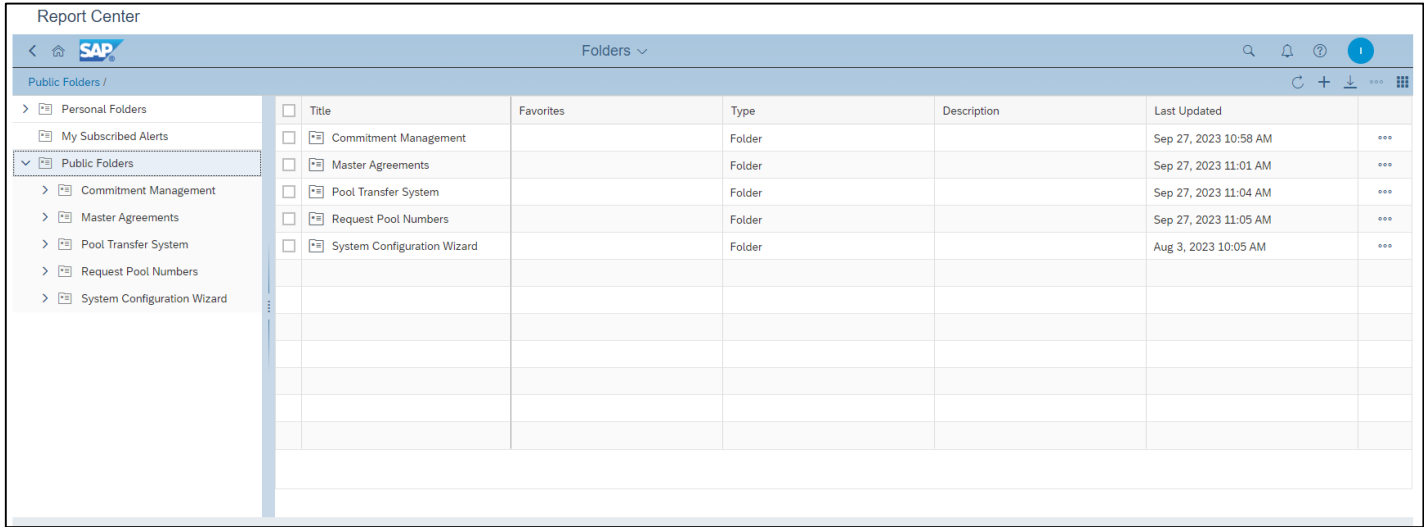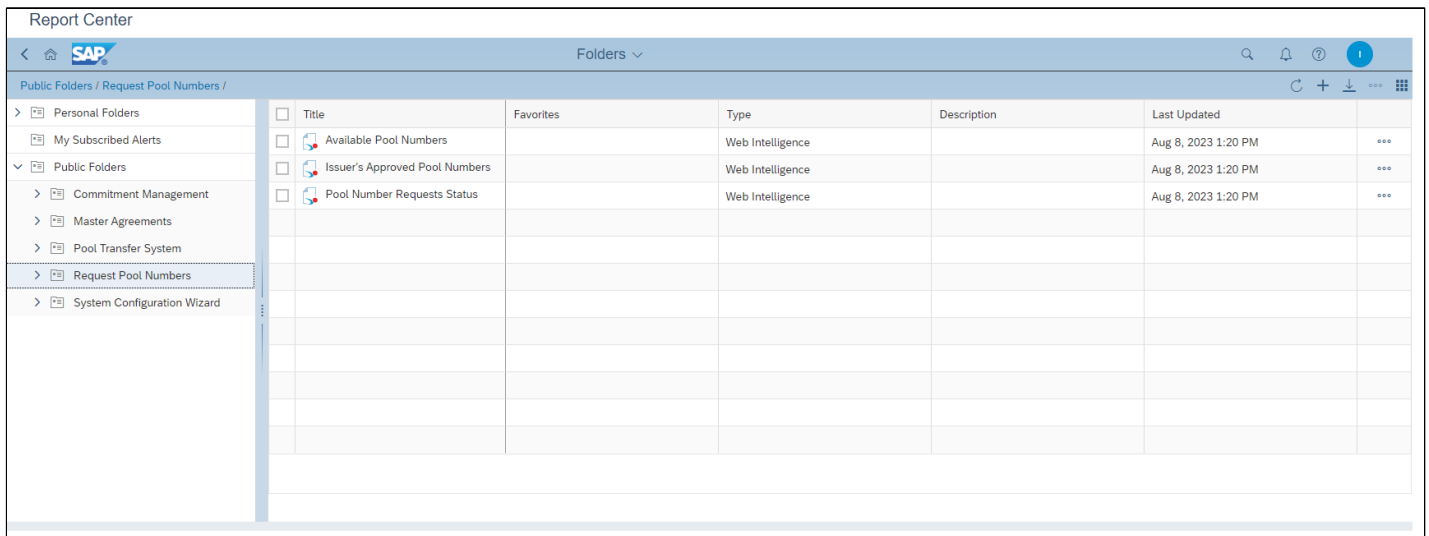
Figure 15 Report Center Screen

1. Click the 📁 Request Pool Numbers hyperlink.

The available reports appear:
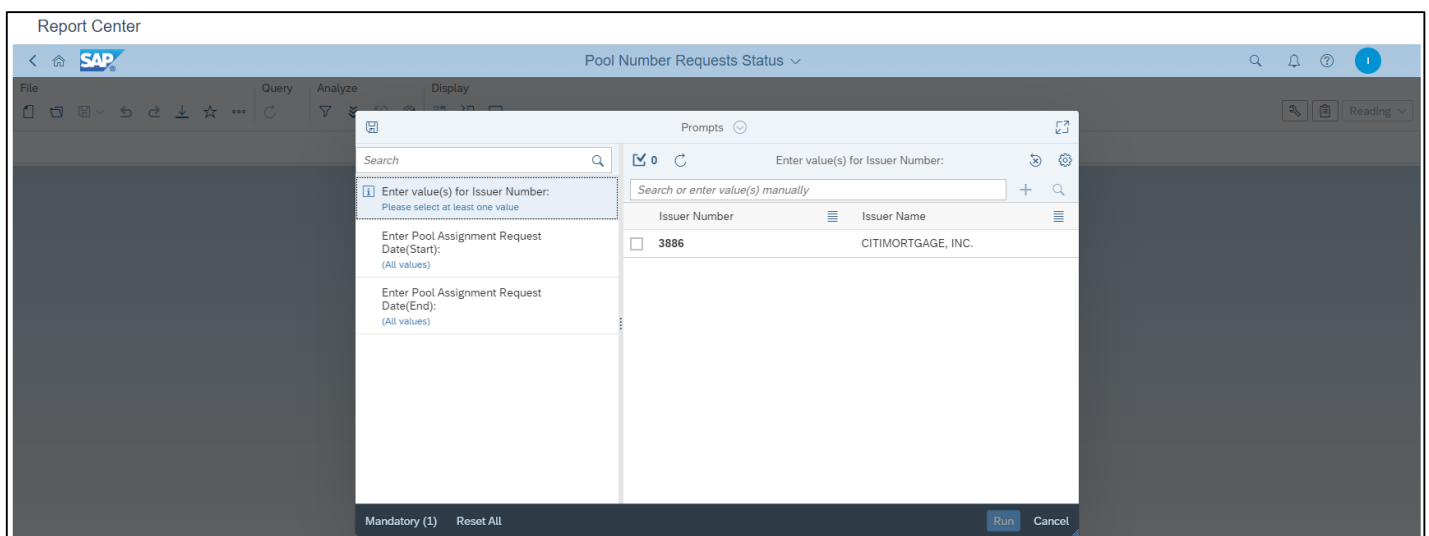
Figure 16 RPN Reports for Issuer

2. Select one of the available reports.

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3.2.2 General Functionality

Once a report is selected from the Reports Selection screen, the **Selection Criteria** prompt appears and allows you to specify the report criteria.

Figure 17 Selection Criteria Screen

1. Select the applicable Issuer(s).

2. Click the button to refresh the available values list box on the left.

3. Click the checkbox for the Issuers to be selected. Click the Run button to generate the report.

4. Click the [>] button to add the selections to the search box on the right or the [<] button to remove selections.

5. Optionally, to select a report date range, click the Start Date and End Date links on the left panel.

6. Click on Refresh (circled below) to get a list of the available dates and select one of them.
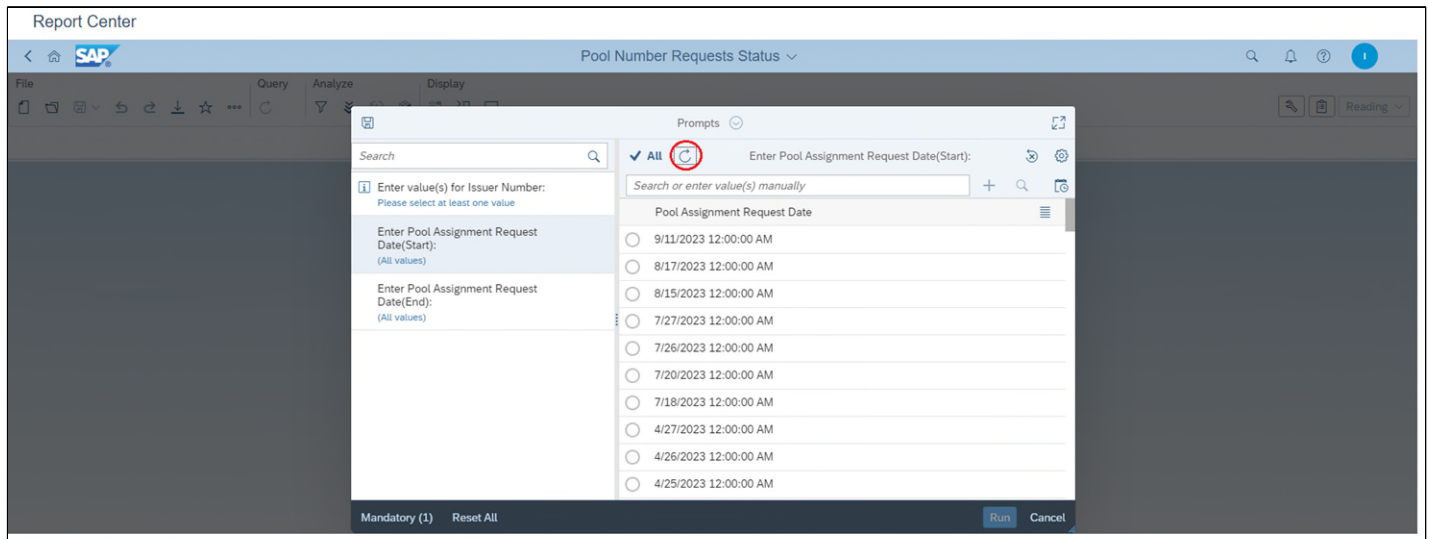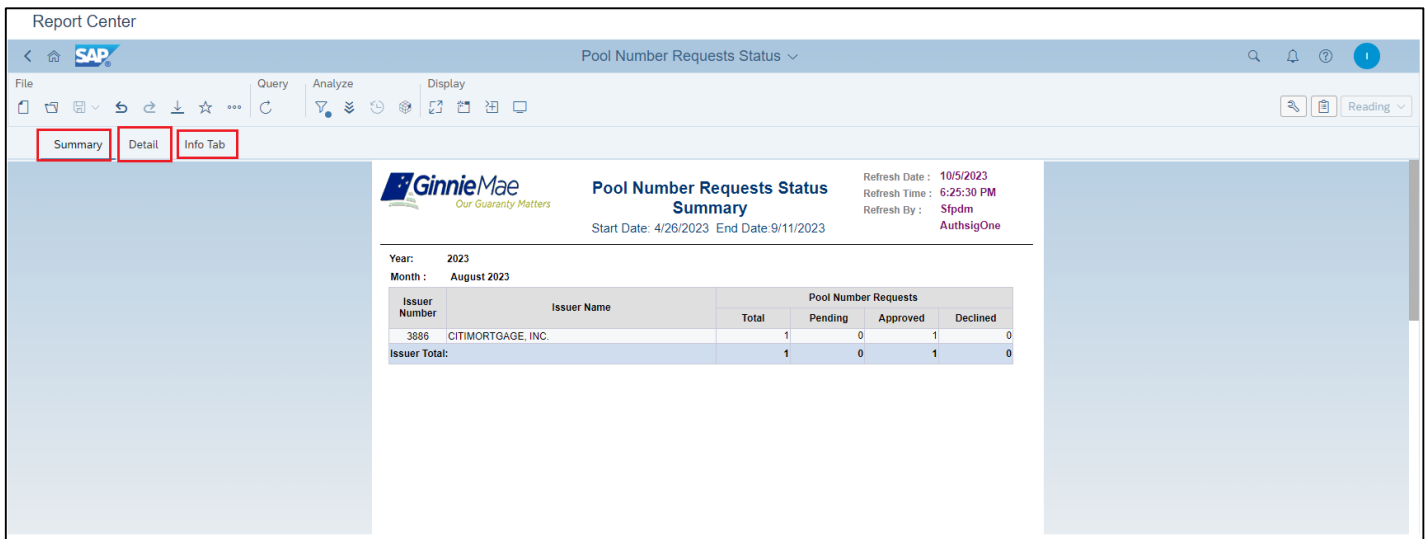
Figure 18 Report Date Selection

7. Click the Run button to generate the report. The report is displayed.

Figure 19 Report Navigator

Menu Bar
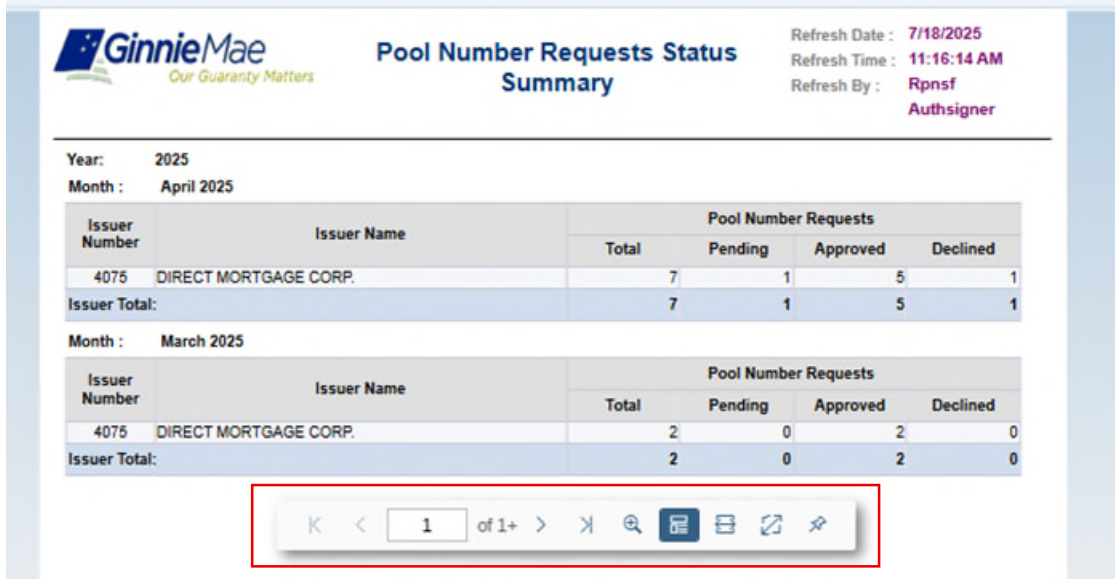
Function	Description
Save	To save the report, the user must select 'Export', as shown in Figure 20.
View	When hovering over the report, a bar comes up at the bottom. Use this bar to page through the report and adjust the View options as desired using Zoom, Hide Print Layout, Fit to Width, and Fit to Page.
Print	Click the ellipsis ⚬⚬⚬ to access the 🖶 Print... Ctrl+P icon to print the report to PDF format.
Undo / Redo	Click the ↶ or ↷ icons to undo or redo previous report actions.
Zoom	Select a ⊕ magnification option to zoom in or out of the report. Zoom is located at the bottom in the navigation bar.
Navigate	For multi-page reports, click the › icon to go to the next page, the ›| icon to go to the last page, the ‹ icon to go to the previous page, or the |‹ icon to go to the first page.
Filtering/Analyze	Click the ▽• to filter the report by one or more fields. Once the filter button is selected, the prompt and issuer number options will be available to filter the report by both options.
Favorite/Unfavorite	Selecting the ☆ button outside of the report will 'favorite' the report and cannot be done while inside of a report.

Table 4 Menu Bar

Reporting Menu
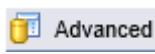
Report Function	Description
Navigation Map	Click the Navigation Map tab [icon] to navigate to a particular section of the report by clicking on the elements on the map.
Selection Parameters	Click the User Input tab [icon] to enter report selection parameters. Once the parameters are entered, click the [Run] button to run the report. The actual selection prompts previously described can be accessed by clicking the [Advanced] button in the User Input tab.
Filtering	Click the Input Controls tab [icon] to enter filter the report by one or more fields. Once the report is filtered, the [Map] button displays the filtering criteria in collapsible format.

Table 5 Reporting Menu
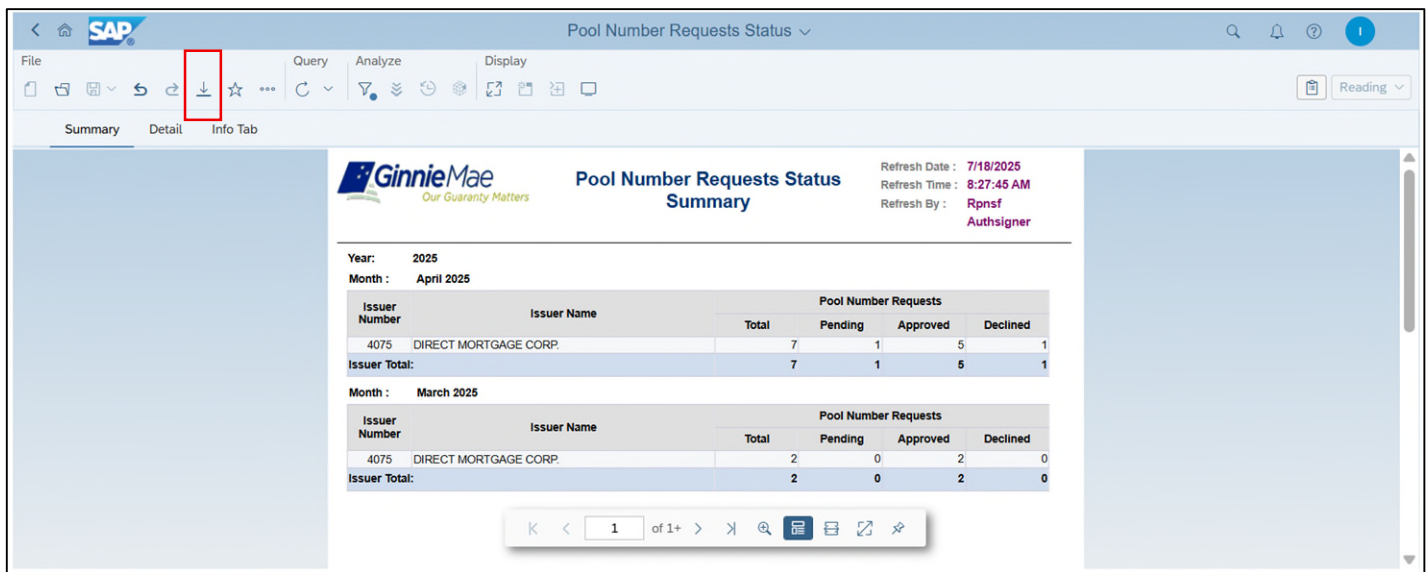
Figure 20 Export Function

Selection Tabs

Report Function	Description
Report Tab	Click the Report tab at the bottom of the report to view the report. This is the default view when a report is generated.
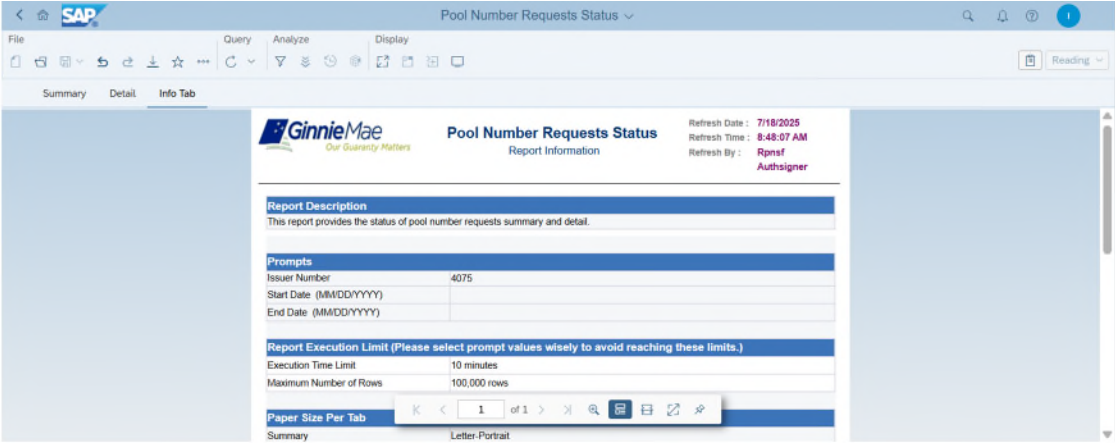
Report Function	Description
Information Tab	Click the Information tab [Info Tab] to view additional information about the report. This ensures that the selection criteria are correctly reflected.

Table 6 Selection Tabs

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3.2.3 Available Pool Numbers Report

This report displays the available numeric and alphanumeric pool numbers for the Issuer.

1. From the Issuer RPN Report screen, click the [📄] Available Pool Numbers hyperlink.

2. In the *Selection Criteria* prompt, enter the report start and end dates.

3. Click the run button to generate the report:

Figure 21 Available Pool Numbers Report

Field/Column	Description
Issuer Number	Four-digit Issuer number assigned by Ginnie Mae.
Issuer Name	Issuer name.
Pool Numbers	Available numeric and alphanumeric pool numbers assigned to the Issuer.
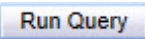
Table 7 Available Pool Numbers Report Columns

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3.2.4 Approved Pool Numbers Report

This report displays the approved pools numbers and the approval date for the Issuer.

1. From the Issuer RPN Report screen, click the ![icon] Issuer's Approved Pool Numbers hyperlink.
2. In the **Selection Criteria** prompt, enter the Issuer and optionally the report start and end dates.

3. Click the **Run Query** button to generate the report:
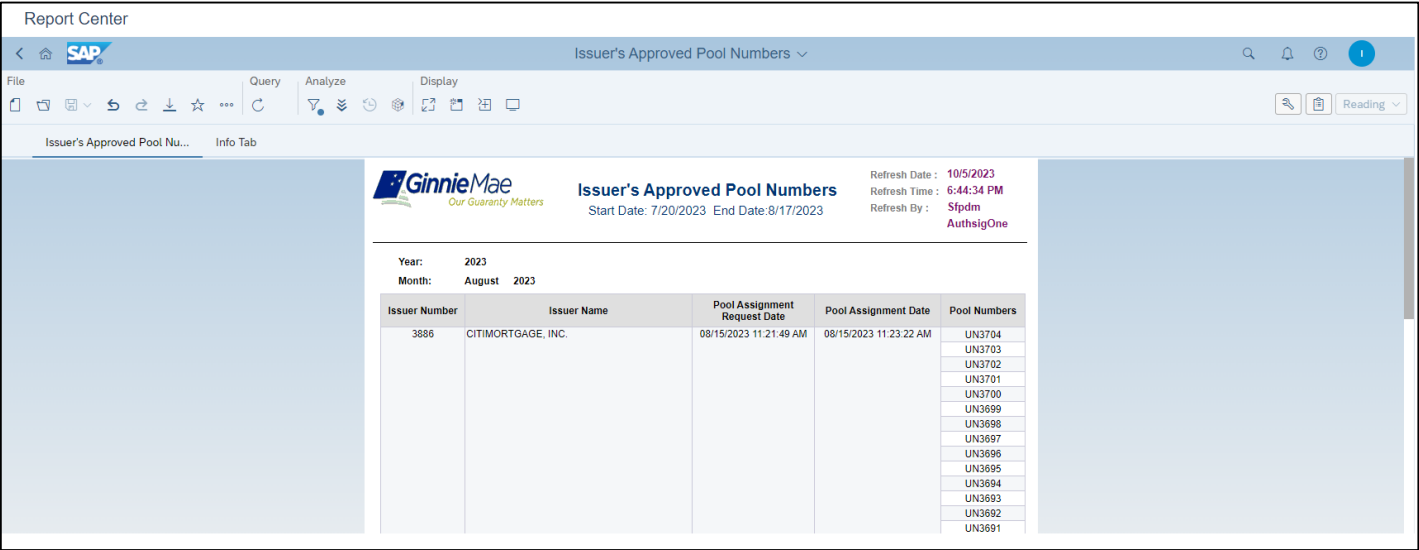
Figure 22 Approved Pool Numbers Report

Field/Column	Description
Year	Report year.
Month	Report month.
Issuer Number	Four-digit Issuer number assigned by Ginnie Mae.
Issuer Name	Issuer name.
Pool Assignment Request Date	The date on which the pool assignment request was submitted by the Issuer.
Pool Assignment Date	The date on which the pool assignment request was approved.
Pool Numbers	Pool numbers assigned. Note: This column also displays all available pool numbers that were assigned to the Issuer prior to the implementation of the modernized RPN system.

Table 8 Approved Pool Numbers Report Columns

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3.2.5 Pool Number Requests Status Summary Report

This report displays the status (Pending, Approved, or Declined) of an Issuer's AE override requests.

1. From the Issuer RPN Report screen, click the **Pool Number Requests Status** hyperlink.

2. In the Selection Criteria prompt, enter the report start and end dates.

3. Click the run button to generate the report:
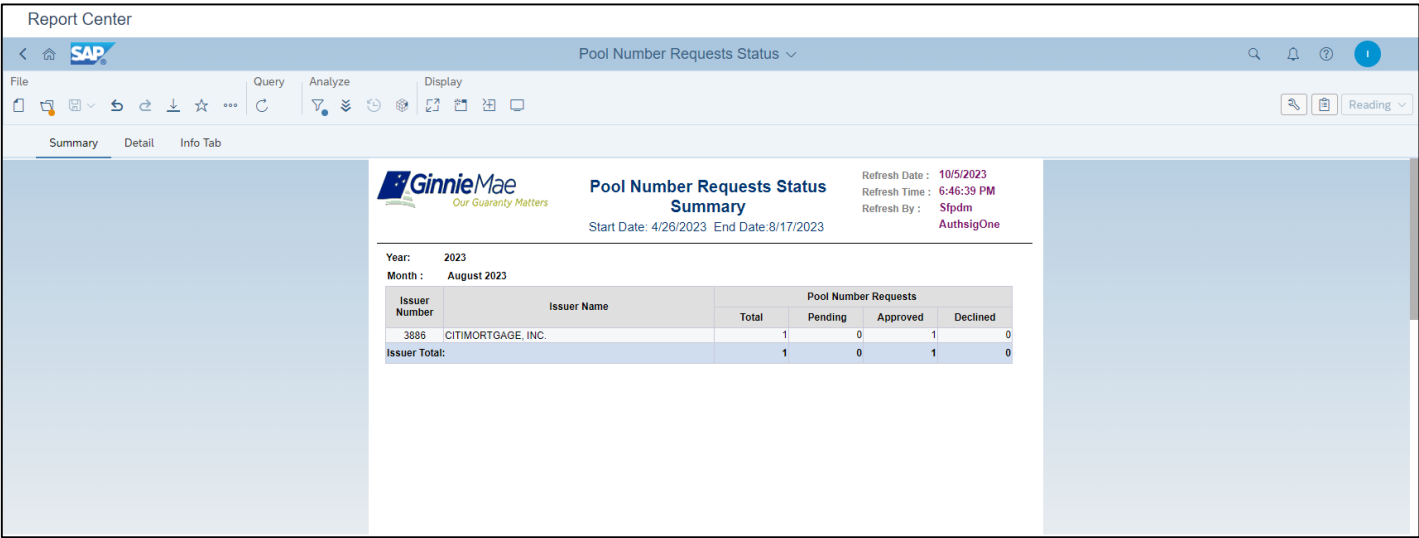
Figure 23 Pool Number Requests Status Summary Report

Field/Column	Description
Year	Report year.
Month	Report month.
Issuer Number	Four-digit Issuer number assigned by Ginnie Mae.
Issuer Name	Issuer name.
Total	Total pool number requests.
Pending	Total pending pool number requests.
Approved	Total approved pool number requests.
Declined	Total declined pool number requests.

Table 9 Pool Number Requests Status Summary Report Fields

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3.2.6 Pool Number Requests Status Detail Report

This report displays the request and approval status for individual pool assignment requests. From the **Pool Number Requests Status Summary Report**, select the **Detail** tab to display the report.
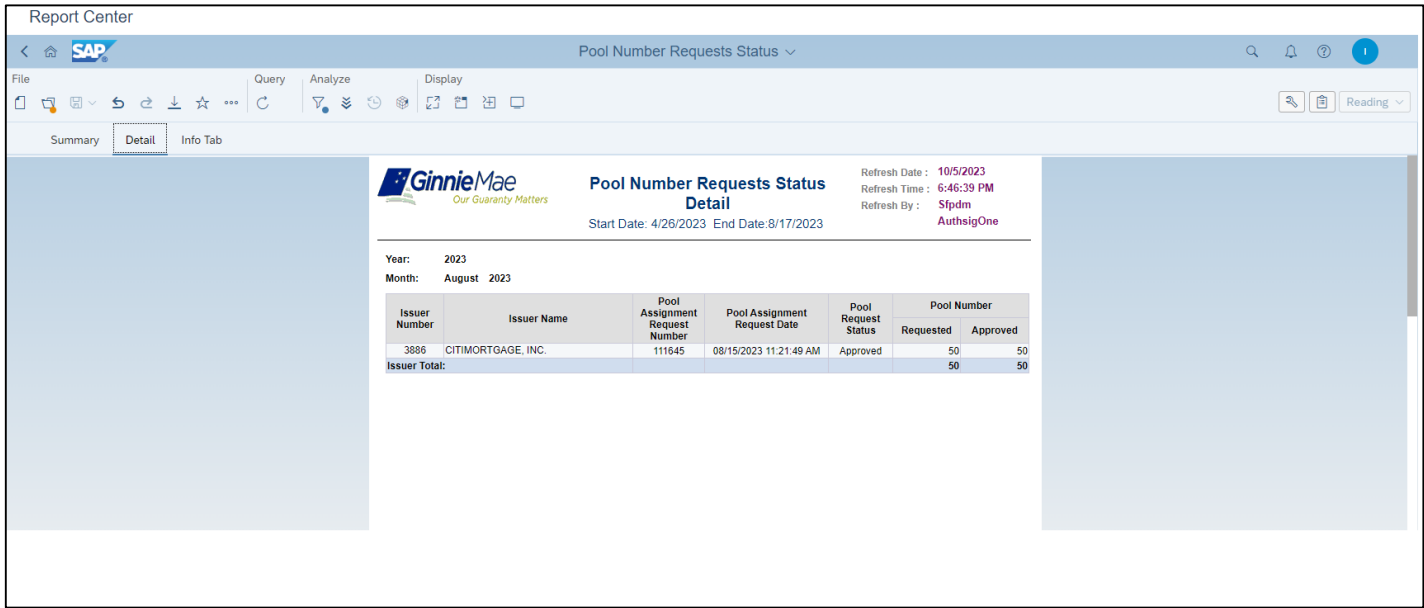
Figure 24 Pool Number Requests Status Detail Report

Field/Column	Description
Year	Report year.
Month	Report month.
Issuer Number	Four-digit Issuer number assigned by Ginnie Mae.
Issuer Name	Issuer name.
Pool Assignment Request Number	The pool assignment request number assigned to this request.
Pool Assignment Request Date	The date on which the pool assignment request was submitted by the Issuer.
Pool Request Status	Request status (Pending/Approved/Declined).
Pool Numbers Requested	The number of pools requested in the particular request.
Pool Numbers Approved	The number of pools approved for the particular request.

Table 10 Pool Number Requests Status Detail Report Fields

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4   RESOURCES

4.1   Help Desk Contact Information

Contact Ginnie Mae Relationship Services Group/Help Desk at 1-800-234-4662, and then select Option 1.

4.2   MyGinnieMae Portal Dictionary

The MyGinnieMae Portal Dictionary is a reference resource for all portal users. The dictionary contains definitions for terms that provide clarification around portal pages, applications, processes, and general functionality pertaining to the MyGinnieMae portal. Refer to the MyGinnieMae Portal Dictionary.

4.3   MyGinnieMae Self-Help Tools

Users should first reference the appropriate section of the MyGinnieMae Getting Started User Manual for information on creating a user account, requesting functional roles, and managing a user account. Some functions a user may complete without the assistance of a system administrator such as:

- Changing a password every 90 days – Changing a Password in MyGinnieMae QRC
- Resetting a forgotten password – Forgot Password in MyGinnieMae QRC
- Updating profile information – Managing My Profile in MyGinnieMae QRC
- Registering for mobile delivery of the OTP – Registering with the Oracle Mobile Authenticator QRC
- Troubleshooting Errors in MyGinnieMae – Troubleshooting and Common Errors in MyGinnieMae QRC

To get more help, users may access the training sessions and materials on the Issuer Training Page of the Ginnie Mae website at https://www.ginniemae.gov/issuers/issuer_training/Pages/ToolsAndResources.aspx. Users may reference the 'Tools and Resources' section and the 'Training Recordings' section.

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5   APPENDIX

5.1   References

The table below summarizes the documents referenced in this document.

Document Name	Description	Location
MyGinnieMae (MGM) User Guide	For Ginnie Mae users, describes how to use MGM	https://my.ginniemae.gov

Table 11 References

5.2   Key Terms

The table below provides definitions and explanations for terms and acronyms relevant to the content presented in this document.

Term	Definition
AE	Account Executive
APM	All Participant Memorandum
CL/CS	Construction Loan / Construction Loan Split-Rate
DD(D)	Detail Design (Document)
ETL	Extract, Transform, Load
EWODS	Enterprise-Wide Operational Data Store
Ginnie Mae	Government National Mortgage Association
GNET	Ginnie*NET*
GNMA	Government National Mortgage Association
HTTPS	Hypertext Transfer Protocol Secure
HUD	U.S. Department of Housing and Urban Development
IPMS	Integrated Pool Management System
IPMSM	Integrated Pool Management System Modernization
IT	Information Technology
MA	Master Agreements
MAMS	Master Agreements Management System
MF	Multi Family
MGM	MyGinnieMae
MH	Manufactured Housing
ML	Multi Line
NPPS	New Pool Processing System
OCIO	Office of the Chief Information Officer
PDF	Portable Document Format
PM	Project Manager
PPA	Pool Processing Agent
PPM	Project Planning and Management
P&I	Principal and Interest
RPN	Request Pool Numbers
RPO	Returned from Post Office

Term	Definition
SA	Security Administrator
SDP	System Decision Paper
SF	Single Family
SFDC	Salesforce.com
SL	Single Line
SO	Organization Administrator Organization Administrator
TDD	Technical Design Document
UFS	Unclaimed Funds System
URL	Uniform Resource Locator

Table 12 Key Terms

5.3   Pool Number Assignment Calculation

The following formula is used to calculate the maximum pool number assignment:

Quarterly Average = (Total number of pools issued for the originating Issuer over the prior 12-month period) / 4.

Or Quarterly Average (New Issuer) = (Total number of pools issued during active months) / Number of months * 3.

New Pool Numbers Automatically Approved = Quarterly Average - alphanumeric pool numbers already in the Issuer's queue.

5.4   Figures

5.5   Tables

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