Fannie Mae

Uniform Closing Dataset Quick Guide
Non-Seller Access to the UCD Collection Solution

Updated June 13, 2017

Purpose of the document:

The Uniform Closing Dataset (UCD) collection solution offers our customers and non-seller correspondent lenders flexible options to submit and receive feedback on the UCD file at multiple points in their business process, enabling them to take advantage of data quality and eligibility checks prior to loan delivery. This document was created to assist Fannie Mae **non-sellers** obtain access to the UCD collection solution and complete the registration process.

Customers will have two options to deliver and receive feedback on their UCD files:

- Direct integration with Fannie Mae's new business-to-business integration platform, enabling UCD file submission directly from the lender's system.
- Web-based user interface allowing quick import of UCD files and receipt of feedback messages; available from FannieMae.com or via a link within Loan Delivery.

There are two roles for UCD:

- **UCD_SUBMIT:** Provides the capability to upload UCD files, search UCD files, and transfer a submitted UCD file to another party. Fannie Mae Sellers have access to the UCD_SUBMIT role using Loan Delivery credentials.
- **UCD_ADMIN:** Provides the capability to establish and manage relationships between correspondents and aggregators who will share UCD data.

> **NOTE**: *The UCD_ADMIN role should only be provisioned to limited number of users. These are specific users in your organization who have the ability to initiate, approve, and view established relationships between a Correspondent and their Aggregator. These users should also request the UCD_SUBMIT role.*

Table of Contents

Select one of the links below to be directed to your specific registration setup based on your Fannie Mae user type.

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1. Existing Fannie Mae Non-Sellers – UCDP/CU

Fannie Mae non-sellers with existing Uniform Collateral Data Portal® (UCDP®) **and** Collateral Underwriter® (CU^{TM}) credentials may obtain access to the UCD solution.

Step 1 – Register for UCD

Your Technology Manager Corporate Administrator must go into Technology Manager: Manage Applications under Available Applications and agree to the Terms & Conditions for the usage of the UCD solution. Once this is complete, UCD will be available as an "Active Application Managed" technology solution. Administrators will then be able grant the UCD solution to specific user profiles as needed.
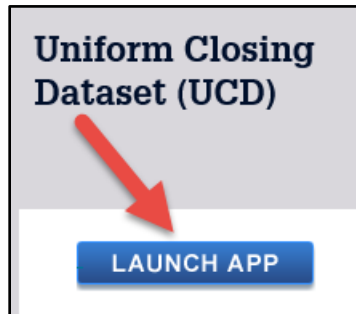
1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select Technology Manager: Registration & Account Management under the Technology Applications & Tools heading
5. Click **LAUNCH APP** and Login
6. Complete the steps to add the UCD solution. *See Section 4 below for detailed instructions*

> ⚠ **NOTE***: Technology Manager Corporate Administrator and User Administrators are able to set up and manage user profiles and access to Fannie Mae technology applications. Administrators can grant and remove access to UCD for any users, as needed. Supporting documentation and job aids can be found on the Technology Manager page.*

Access the UCD Collection Solution from FannieMae.com

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select the **Uniform Closing Dataset (UCD)** link under UMDP Data Requirements section. The **UCD** home page will appear. Hint: You may want to bookmark this page in your web browser.
5. Click **LAUNCH APP**. A new browser will open displaying the **UCD Login** page.

1. Enter your Fannie Mae User Name and Password, and click Login

LOG IN

User Name: _____

Password: _____

LOGIN   Clear

Need Help With Your User ID or Password?

*Please Do Not Bookmark this page

2. The **UCD solution** home page will appear

Fannie Mae   Help ▾   Log Out

| Upload | Search |

Please select a UCD file

Choose File...

Upload   Clear   Refresh

© 2016 Fannie Mae.   *Logged in as:*

2. Existing Fannie Mae Non-Sellers – UCDP Only

Fannie Mae non-sellers with existing Uniform Collateral Data Portal® (UCDP®) *only* credentials may obtain access to the UCD solution. Before you can register for UCD, you will need to register for Collateral Underwriter® (CU™). We encourage you to register for CU by completing steps 1 and 2 below at your earliest convenience.

Step 1 – Request your password:

Before you can login to the UCD solution, you must have your original Fannie Mae Lender Admin user name and password available.

To retrieve your Fannie Mae user name/password, follow these steps:

1. Call the Technology Support Center (800-2FANNIE or 800-232-6643)
2. Follow the prompts for Single Family Technology Support.

Request a password reset

Once you have received your original Fannie Mae Lender Admin user credentials, follow the steps below to register for Collateral Underwriter.

Step 2 – Register for Collateral Underwriter:

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Originating & Underwriting** tab
4. Select **Collateral Underwriter** under the Technology Applications & Tools heading
5. Under Registration & Account Management, open the ***CU Non-Seller Implementation Guide***
6. Refer to ***Step 2 – Complete Contracting, Registration, and CU User Setup*** section of this document
7. Once the contract and registration process are complete, you're UCDP **Lender Administrator** – who is now also setup as a Technology Manager **Corporate Administrator** -- can set up and manage CU application user credentials.

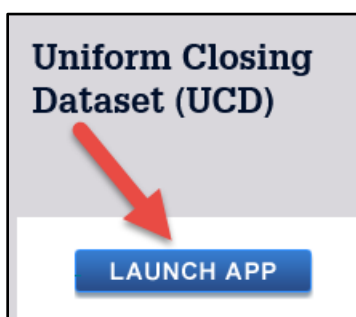## *Step 3 – Register for the UCD collection solution*

Once the UCDP/CU registration process is completed successfully, your Technology Manager Corporate Administrator must go into Technology Manager: Manage Applications under Available Applications and agree to the Terms & Conditions for the usage for UCD solution. Once this is complete, UCD will be available as an

"Active Application Managed" technology solution. Administrators will then be able grant the UCD solution to specific user profiles as needed. *See Section 4 below for detailed instructions.*

Access the UCD Collection Solution from FannieMae.com

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select the **Uniform Closing Dataset (UCD)** link under UMDP Data Requirements section. The **UCD** home page will appear. Hint: You may want to bookmark this page in your web browser.
5. Click **LAUNCH APP**. A new browser will open displaying the **UCD Login** page.

1. Enter your Fannie Mae User Name and Password, and click Login

LOG IN

User Name:

Password:

LOGIN   Clear

Need Help With Your User ID or Password?

***Please Do Not Bookmark this page**

2. The **UCD solution** home page will appear

Fannie Mae   Help ▾   Log Out

Upload   Search

Please select a UCD file
Choose File...

Upload   Clear   Refresh

© 2016 Fannie Mae.   Logged in as:

3. New Fannie Mae Non-Sellers

New Fannie Mae non-sellers must follow the Uniform Collateral Data Portal® (UCDP®) / Collateral Underwriter® (CU™) registration process for non-seller correspondents before they can access UCD solution. Register for UCDP and Collateral Underwriter by completing steps 1 and 2 below.

Step 1 – Register for UCDP Access:

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Originating & Underwriting** tab
4. Select **UCDP** under the Technology Applications & Tools heading
5. Under Technology Requirements & Registration, open the **How to Register for UCDP** document.
6. Refer to the **Correspondents (Non-Seller/Servicers) that do not have an existing Fannie Mae Seller/Servicer Number** section of the document.

> **NOTE:** *It takes between 7-10 business days to be issued registration for UCDP.*

Step 2 – Register for Collateral Underwriter Access:

Once you have received your UCDP credentials, follow the steps to register for Collateral Underwriter.

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Originating & Underwriting** tab
4. Select **Collateral Underwriter** under the Technology Applications & Tools heading
5. Under Registration & Account Management, open the **CU Non-Seller Implementation Guide**
6. Refer to **Step 2 – Complete Contracting, Registration, and CU User Setup** section of this document
7. Once the contract and registration process are complete, your UCDP Lender Administrator – who is now also setup as a Technology Manager Corporate Administrator -- can set up and manage CU application user credentials.

Step 3 – Register for UCD Access

Your Technology Manager Corporate Administrator must go into Technology Manager: Manage Applications under Available Applications and agree to the Terms & Conditions for the usage of the UCD solution. Once this is complete, UCD will be available as an "Active Application Managed" technology solution. Administrators will then be able grant the UCD solution to specific user profiles as needed.

1. On the FannieMae.com Home page, click **Funding the Market**
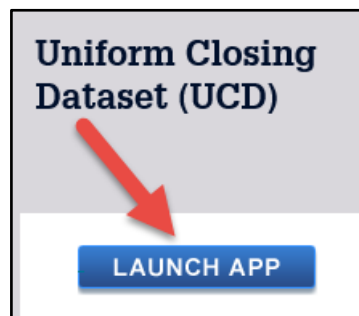2. Under Business Partners Click **Single-Family Business**

3. Click the **Delivering** tab
4. Select **Technology Manager: Registration & Account Management** under the Technology Applications & Tools heading
5. Click **LAUNCH APP** and Login
6. Complete the steps to add the UCD solution. *See Section 4 below for detailed instructions*.

> ⚠️ **NOTE***: Technology Manager Corporate Administrator and User Administrators are able to set up and manage user profiles and access to Fannie Mae technology applications. Administrators can grant and remove access to UCD for any users, as needed. Supporting documentation and job aids can be found on the Technology Manager page.*

Access the UCD Collection Solution from FannieMae.com

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select the **Uniform Closing Dataset (UCD)** link under UMDP Data Requirements section. The **UCD** home page will appear. Hint: You may want to bookmark this page in your web browser
5. Click **LAUNCH APP**. A new browser will open displaying the **UCD Login** page.

Uniform Closing Dataset (UCD)

LAUNCH APP

6. Enter your Fannie Mae User Name and Password, and click Login.

LOG IN

User Name:	
Password:	

LOGIN   Clear

Need Help With Your User ID or Password?

*Please Do Not Bookmark this page

7. The **UCD solution** home page will appear.

Fannie Mae

Help ▾   Log Out

Upload	Search

Please select a UCD file

Choose File…

Upload   Clear   Refresh

© 2016 Fannie Mae.

Logged in as:

4. Grant Access to UCD Application in Technology Manager

1. On the Technology Manager Home Page, click the **Manage Users** link.

Corporate Administrator Home Page

My Company
Subscriber ID - Name:
c010ub - GEM SAVINGS ASSOCIATION - 16101   ∨ Search...

Applications	Users	Company
I Would Like To...	*I Would Like To...*	*I Would Like To...*
Manage Applications	Update My Info	Edit Company Configuration
Manage Data Folders		Manage Lender/Broker Relationships
	Create New User	Generate Reports
	Manage Users	
	Manage User Groups	

User Administrator Home Page

My Company
Subscriber ID - Name:
c010ub - GEM SAVINGS ASSOCIATION - 16101

I Would Like To...

Update My Info

Create New User

Manage Users

Generate Reports

2. The Manage Users screen appears. In the Search field, enter the desired search criteria and search value, then click **Search**.

3. Click the **Active Users panel** where the user's record was found, then select the **user record**.

4. Click the **Available Applications I Manage** panel, then click the **UCD** application you want to assign to the user.

5. The **Set Up User Access** screen appears.

6. In the Roles section, select the **role(s) you want to assign** to the user, then click **Add**.

   UCD_SUBMIT: All users should have UCD_SUBMIT access.

   UCD_ADMIN: role should only be provisioned to a limited number of users. These are specific users in your organization who have the ability to initiate, approve, and view established relationships between correspondents and aggregators. These users should also request the **UCD_SUBMIT** role.

7. In the Data Folder section, select which **data folder(s)** the user will be able to access, then click **Add**.

8. Click **Submit**.

9. An Alert box appears. Click **Confirm** to save your changes.

Additional Information:

Application	Bookmark the Page	Support options
UCD	www.fanniemae.com/singlefamily/uniform-closing-dataset	UCD@fanniemae.com or Fannie Mae Representative
Loan Delivery	www.fanniemae.com/singlefamily/loan-delivery	800-2FANNIE (800-232-6643)
Collateral Underwriter	www.fanniemae.com/singlefamily/collateral-underwriter	800-2FANNIE (800-232-6643)
UCDP	www.fanniemae.com/singlefamily/uniform-collateral-data-portal	800-2FANNIE (800-232-6643) UCDP_setup@fanniemae.com
Technology Manager	www.fanniemae.com/singlefamily/technology-manager	800-2FANNIE (800-232-6643) technology_manager_request@fanniemae.com