

Uniform Collateral Data Portal Reference Series for the Lender Admin: 5 - Managing Aggregator Profile

This reference is the fifth in a series of references for the Lender Administrator, a Uniform Collateral Data Portal® (UCDP®) user who has authority to set up and manage the business structure within the portal, including the access privileges of other users. This user is known as the lender admin. The focus of this reference is on managing the aggregator profile. The other references in this series include:

- [Series 1: Lender Admin Registration](#)
- [Series 2: Managing Business Units](#)
- [Series 3: Managing Users](#)
- [Series 4: Managing Lender Agents](#)

The topics covered in this reference include:

- [Managing Aggregator Setup Overview](#)
- [Creating an Aggregator](#)
- [Modifying an Existing Aggregator](#)
- [Finding Additional Assistance](#)

Managing Aggregator Setup Overview

An aggregator profile is required for a UCDP lender who wants to have the ability to view appraisals shared by their correspondent lenders or correspondent lenders' authorized agents. As the lender admin, you are responsible for creating and managing the aggregator profile for your organization.

Once you have established business units for your organization, you may register for the aggregator profile. The aggregator profile set-up requires data entry on an aggregator name, a single Fannie Mae 5-digit Seller Number, and/or a single Freddie Mac Seller Number, City, and State. The information provided during the aggregator set-up will be available to your correspondent lenders when they share appraisals with your organization. Your correspondent lenders may not share appraisals with your organization through the UCDP until you complete the aggregator set-up.

For most organizations, establishing one aggregator profile under the primary business unit meets business needs. You can create only one aggregator profile under each business unit.

Individual users at the business unit level where the aggregator profile is created have read-only access to appraisals shared by their correspondent lenders.

In the event your organization requires additional aggregator profiles, the lender admin may register additional aggregators under the child business units.

The functionality associated with an aggregator profile set up includes:

Functionality	Description
Creating an Aggregator	Enables you to create an aggregator profile so that your correspondent lenders may share appraisals with your organization.
Modifying an Aggregator	Enables you to modify an existing aggregator profile to meet current needs.

Creating an Aggregator

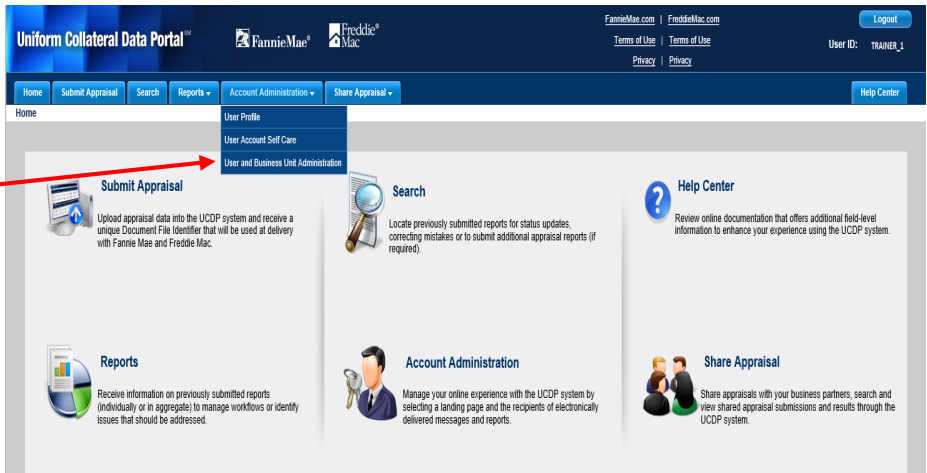
Creating an aggregator profile is the prerequisite for your correspondent lenders to share their appraisals with your organization.

You can create only one aggregator profile under each business unit. **For most organizations, establishing one aggregator profile under the primary business unit meets business needs.** In the event your organization requires additional aggregator profiles, the lender admin may register additional aggregators under the child business units.



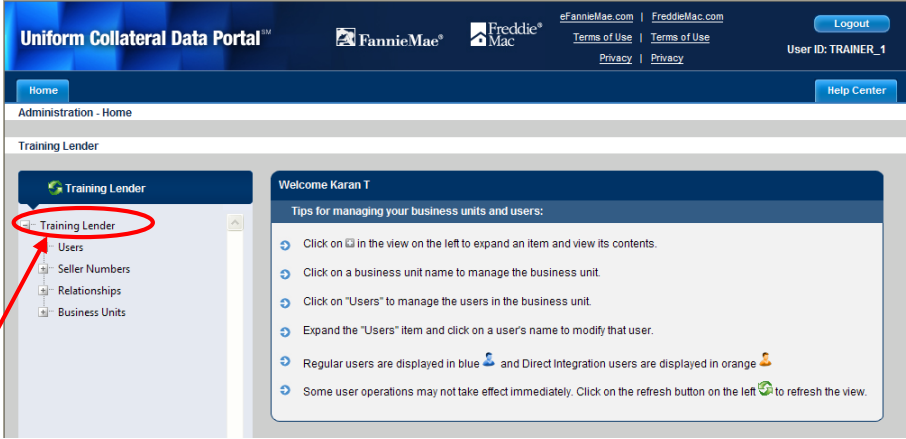


Although you may create additional aggregator profiles, you must select a FRE Seller Number and/or a FNM Seller Number (5-digit) that are not associated with any existing aggregator profile. Most organizations typically transact under one seller number for each GSE and may only set up one aggregator profile.

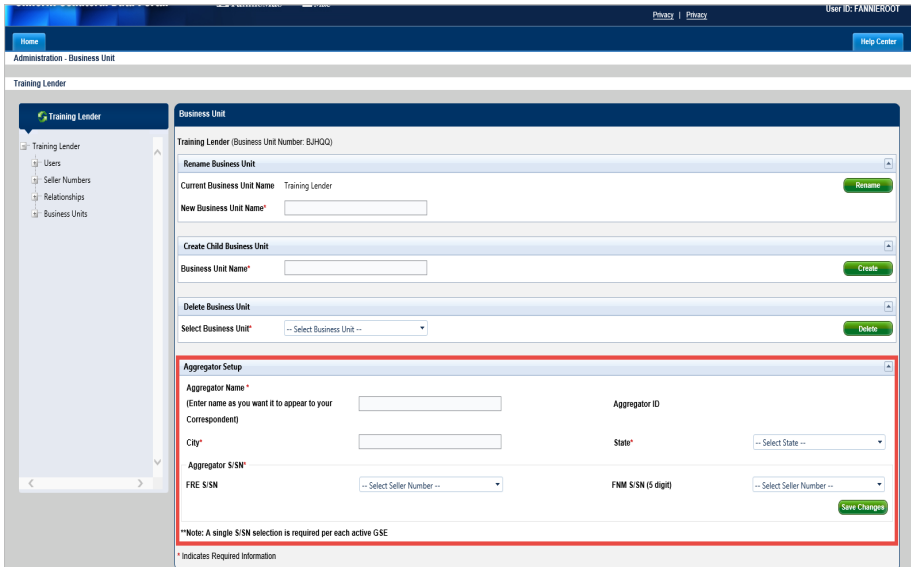
To create an aggregator profile, follow these steps:

Creating an Aggregator Profile	
Step	Action / Result
1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration .	 <p>After you select User and Business Unit Administration, the Administration - Home page appears.</p>

Creating an Aggregator Profile






Step	Action / Result
<p>2. From the Administration – Home page, select the Business Unit</p> <p> Training Lender is the parent business unit in this example.</p> <p> If your organization requires additional aggregator profiles under the child business units, click the + Business Units to display the list of existing child business units and select the child business unit.</p>	

After you select the Business Unit from the left navigation bar, the **Administration – Business Unit** page appears.



The “Aggregator Setup” section of the Business Unit page allows you to manage your aggregator profile. You can create a new aggregator profile or modify an existing aggregator profile. The focus of this section is on creating a new aggregator profile.

Creating an Aggregator Profile

Step	Action / Result
<p>3. From the Administration – Business Units page, locate the Aggregator Setup section and enter the required fields:</p> <ul style="list-style-type: none"> • Enter the Aggregator Name • Enter the City of your organization • Click the State dropdown to select the State of your organization • Click the FRE S/SN dropdown to select a single Seller Number for Freddie Mac • Click the FNM S/SN (5-digit) dropdown to select a single Seller Number for Fannie Mae <p>Click Save Changes</p> <p> A single S/SN selection is required per active GSE.</p>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Aggregator Setup</p> <p>Aggregator Name * (Enter name as you want it to appear to your Correspondent) <input type="text" value="Training Aggregator"/> Aggregator ID</p> <p>City* <input type="text" value="Herndon"/> State* <input type="text" value="VA"/></p> <p>Aggregator S/SN*</p> <p>FRE S/SN <input type="text" value="-- Select Seller Number --"/> FNM S/SN (5 digit) <input type="text" value="10006"/></p> <p style="text-align: right;">Save Changes</p> <p><small>**Note: A single S/SN selection is required per each active GSE</small></p> <p><small>* Indicates Required Information</small></p> </div> <p> The FRE S/SN drop down displays the list of available Seller Number(s) assigned to the business unit.</p> <p> The FNM S/SN (5-digit) drop down list displays the first five digits of the available Seller Number(s) assigned to the business unit.</p> <p> FNM S/SN (5-digit) drop down: Please select the 5-digit S/SN based on the S/SN that you use for your UCDP appraisal submissions.</p> <p> If you have multiple S/SNs listed and have questions on which to use, contact your Fannie Mae or Freddie Mac customer account team.</p>

Creating an Aggregator Profile

Step

Action / Result

After you click Save Changes, a confirmation message appears at the top of the screen and the Aggregator ID value is displayed within the Aggregator Setup section. The Aggregator ID is a system generated ID that uniquely identifies the aggregator profile.

In the example below, the aggregator profile has been successfully created and an Aggregator ID has been generated. The Aggregator ID also appears next to the aggregator name in the confirmation message.

Aggregator successfully created as Training Aggregator (PTB560)

The screenshot displays the 'Training Lender' interface. A confirmation message at the top states: "Aggregator successfully created as Training Aggregator (PTB560)". Below this, the 'Aggregator Setup' section is visible, containing the following fields:

Field	Value
Aggregator Name *	Training Aggregator
Aggregator ID	PTB560
City *	Herndon
State *	VA
Aggregator S/ SN *	
FRE S/ SN	-- Select Seller Number --
FNM S/ SN (5 digit)	10006

Buttons for 'Rename', 'Create', 'Delete', and 'Save Changes' are present. A note at the bottom states: "**Note: A single S/ SN selection is required per each active GSE".



Important: After the aggregator is successfully created, communicate the newly created aggregator name and aggregator ID to your correspondent lenders so they can start sharing appraisals with your organization.

Modifying an Aggregator

Modifying an existing aggregator profile provides a way to help meet changing business needs. When your organization makes organizational changes, you can use this functionality to align with those changes and update the aggregator name, city, state, or the selected S/SN.


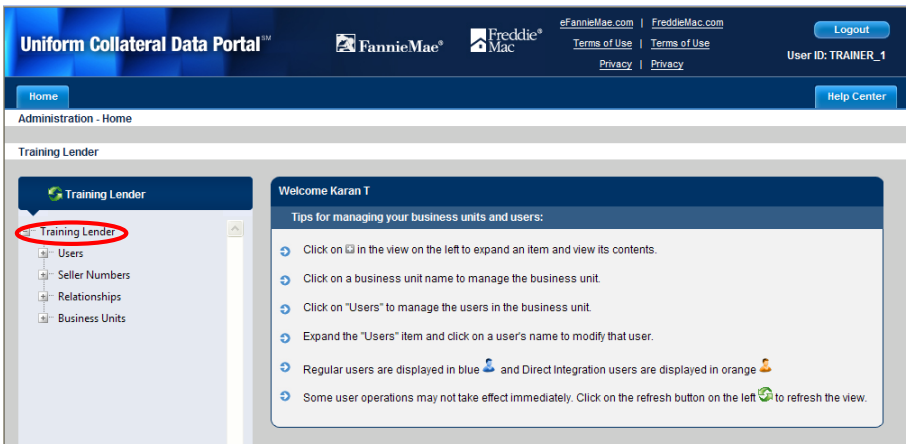
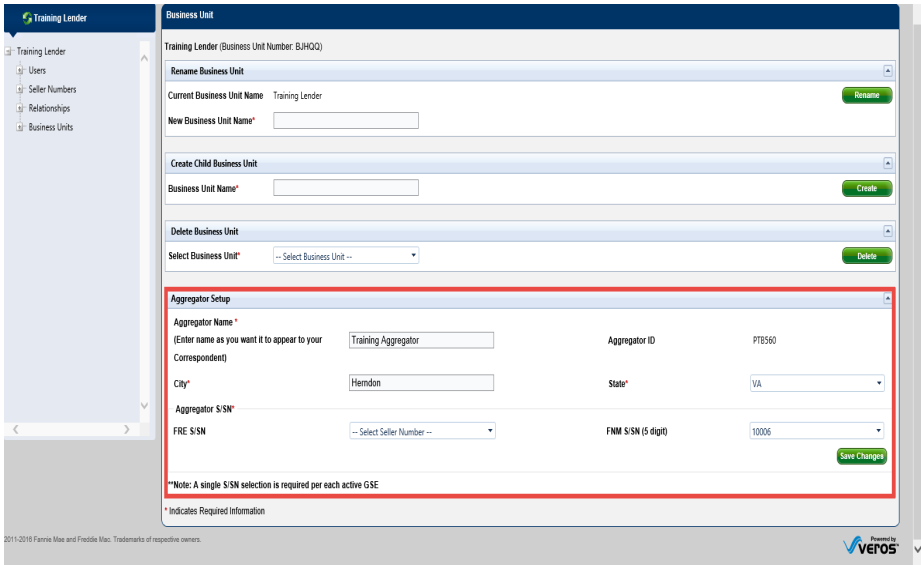


Communicate any changes to your correspondent lenders so they can select the correct aggregator when sharing appraisals.







To modify an existing aggregator profile, follow these steps:

Modifying an Aggregator	
Step	Action / Result
<p>1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.</p>	 <p>After you select User and Business Unit Administration, the Administration - Home page appears.</p>

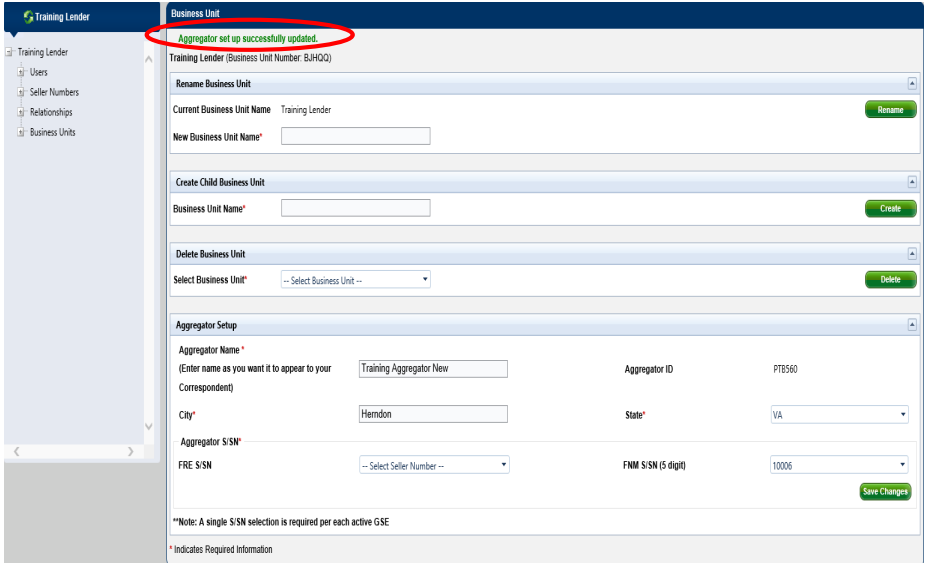
Modifying an Aggregator

Step	Action / Result												
<p>2. From the Administration – Home page, select the Business Unit where the aggregator profile was created</p> <p> Training Lender is the business unit in this example.</p>	 <p>The screenshot shows the 'Administration - Home' page for the 'Training Lender' business unit. The left navigation bar includes 'Training Lender', 'Users', 'Seller Numbers', 'Relationships', and 'Business Units'. The 'Training Lender' item is highlighted with a red circle. The main content area displays a welcome message for 'Karan T' and a 'Tips for managing your business units and users' section with instructions on how to interact with the system.</p>												
	<p>After you select Business Units from the left navigation bar, the Administration – Business Unit page appears.</p>  <p>The screenshot shows the 'Administration - Business Unit' page for 'Training Lender (Business Unit Number: BJHQ)'. The left navigation bar is visible. The main content area includes sections for 'Rename Business Unit', 'Create Child Business Unit', and 'Delete Business Unit'. The 'Aggregator Setup' section is highlighted with a red border and contains the following information:</p> <table border="1"> <tr> <td>Aggregator Name* (Enter name as you want it to appear to your Correspondent)</td> <td><input type="text" value="Training Aggregator"/></td> <td>Aggregator ID</td> <td>PTB560</td> </tr> <tr> <td>City*</td> <td><input type="text" value="Hemdon"/></td> <td>State*</td> <td>VA</td> </tr> <tr> <td>Aggregator S/SN*</td> <td><input type="text" value=""/></td> <td>FNM S/SN (5 digit)</td> <td>10006</td> </tr> </table> <p>Below the form, there is a note: "A single S/SN selection is required per each active GSE" and a "Save Changes" button.</p>	Aggregator Name* (Enter name as you want it to appear to your Correspondent)	<input type="text" value="Training Aggregator"/>	Aggregator ID	PTB560	City*	<input type="text" value="Hemdon"/>	State*	VA	Aggregator S/SN*	<input type="text" value=""/>	FNM S/SN (5 digit)	10006
Aggregator Name* (Enter name as you want it to appear to your Correspondent)	<input type="text" value="Training Aggregator"/>	Aggregator ID	PTB560										
City*	<input type="text" value="Hemdon"/>	State*	VA										
Aggregator S/SN*	<input type="text" value=""/>	FNM S/SN (5 digit)	10006										
	<p>The “Aggregator Setup” section of the Business Unit page allows you to manage your aggregator profile. You can create a new aggregator profile or modify an existing aggregator profile. The focus of this section is on modifying an existing aggregator profile.</p>												

Modifying an Aggregator

Step	Action / Result
<p>3. From the Administration – Business Units page, locate the Aggregator Setup section and modify the data fields, as applicable.</p> <p>You may edit the following fields:</p> <ul style="list-style-type: none"> • Aggregator Name • FRE S/SN • FNM S/SN (5-digit) • City • State <p>In this example, the Aggregator Name is changed.</p> <p>Click Save Changes</p> <p> A single S/SN selection is required per active GSE.</p> <p> You must select active S/SNs for at least one GSE.</p> <p> In the event that the select FNM S/SN or FRE S/SN becomes inactive, make sure to re-select an active S/SN for the aggregator setup.</p>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p>Aggregator Setup</p> <p>Aggregator Name * (Enter name as you want it to appear to your Correspondent) <input style="width: 150px;" type="text" value="Training Aggregator New"/> x</p> <p>Aggregator ID: PT8560</p> <p>City * <input type="text" value="Herndon"/> State * <input type="text" value="VA"/></p> <p>Aggregator S/SN*</p> <p>FRE S/SN <input type="text" value="-- Select Seller Number --"/> FNM S/SN (5 digit) <input type="text" value="10006"/></p> <p style="text-align: right;">Save Changes</p> <p><small>**Note: A single S/SN selection is required per each active GSE.</small></p> </div> <p> The FRE S/SN drop down displays the list of available Seller Number(s) assigned to the business unit.</p> <p> The FNM S/SN (5-digit) drop down list displays the first five digits of the available Seller Number(s) assigned to the business unit.</p> <p> FNM S/SN (5-digit) drop down: Please select the 5-digit S/SN based on the S/SN that you use for your UCDP appraisal submissions.</p> <p>If you have multiple S/SNs listed and have questions on which to use, contact your Fannie Mae or Freddie Mac customer account team.</p>

Modifying an Aggregator

Step	Action / Result
	<p>After you click Save Changes, an Aggregator successfully updated message appears.</p>  <p>The screenshot shows the 'Business Unit' configuration page for 'Training Lender'. A red circle highlights the message 'Aggregator set up successfully updated.' at the top of the page. Below the message are sections for 'Rename Business Unit', 'Create Child Business Unit', 'Delete Business Unit', and 'Aggregator Setup'. The 'Aggregator Setup' section includes fields for 'Aggregator Name' (Training Aggregator New), 'Aggregator ID' (PTB560), 'City' (Herndon), 'State' (VA), 'Aggregator S'ISN', 'FRE S'ISN', and 'FIM S'ISN (5 digit)' (10006). A 'Save Changes' button is visible at the bottom right of the form.</p>

Finding Additional Assistance

For additional assistance, refer to:

- [Fannie Mae's UCDP web page](https://www.fanniemae.com/singlefamily/uniform-collateral-data-portal)
(<https://www.fanniemae.com/singlefamily/uniform-collateral-data-portal>)
- [Freddie Mac's UCDP web page](http://www.freddie.mac.com/singlefamily/sell/uniform_collateral_data_portal.html)
(http://www.freddie.mac.com/singlefamily/sell/uniform_collateral_data_portal.html)
- The UCDP Support Center at 1-800-917-9291
- UCDP Help Center (accessible after you log in to the UCDP)