

Uniform Closing Dataset Quick Guide

Non-Seller Access to UCD Collection Solution

Updated March 2020

The Purpose of this 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. This allows them to take advantage of data quality and eligibility checks prior to loan delivery. This document was created to assist Fannie Mae non-sellers in obtaining access to the UCD collection solution and completing the registration process.

Before you can access the UCD Collection Solution, you must have active user credentials for UCD. This document includes the roles available along with directions for getting access based on your existing Fannie Mae credentials.

Roles

The UCD collection solution will allow for the following access roles:

- **UCD_ADMIN:** Provides the capability to establish and manage relationships between correspondents and aggregators who will share UCD data.
- **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.

NOTE: The UCD_ADMIN role should 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 their aggregators. These users **must** also request the UCD_SUBMIT role.

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Existing Fannie Mae Non-Sellers – UC DP/ CU

Fannie Mae Non-Sellers who have existing UC DP **and** CU credentials can obtain access to the UCD solution. Review the steps below.

Step 1 – Register for UC D

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



needed.

1. On the FannieMae.com Home page, click **Single-Family Mortgages**
2. Click **Technology Solutions**
3. Under Support for Registered Users, Click [Technology Manager](#)
4. Click **LAUNCH APP** and log in
5. Complete the steps to add the UCD Collection Solution for that user.

When requesting access to the UCD collection solution, you can also request access for the UCD Test environment. In Technology Manager the Administrator will find the "UCD CLVE" link from the list of available applications, select this to provide access users within your company. All users **must** have the UCD_SUBMIT role. You can provision the UCD_ADMIN role to users who initiate, approve and view established relationships between a Correspondent and their Aggregator.

Existing Fannie Mae Non-Sellers – UCDP Only

Fannie Mae Non-Sellers who have existing Uniform Collateral Data Portal® (UCDP®) **only** credentials may obtain access to the UCD solution. You will need to, however, register for Collateral Underwriter® (CU™). Once this process is complete then you can register for the UCD solution.

Step 1 – Request your password

Before you can log into the UCD solution, you must have your original Fannie Mae Lender Admin username and password available.

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

1. Call the Technology Solution 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 **Single-Family Mortgages**
2. Click **Technology Solutions**
3. Under Technology, Click [Collateral Underwriter](#)
4. Under Access, open the **CU Non-Seller Implementation Guide**
5. Refer to **Step 2 – Complete Contracting, Registration, and CU User Setup** section of this document
6. Once the contract and registration process are complete, your UCDP Lender Administrator – who is now also setup as a Technology Manager Corporate Administrator – can officially set up and manage CU application user credentials.

Step 3 – Register for the UCD 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 to use the



UCD solution. UCD will then be available as an “Active Application Managed” technology solution. Administrators may then grant access to the UCD solution for specific user profiles as needed.

When requesting access to the UCD collection solution, you can also request access for the UCD Test environment. In Technology Manager the Administrator will find the “UCD CLVE” link from the list of available applications, select this to provide access users within your company. All users **must** have the UCD_SUBMIT role. You can provision the UCD_ADMIN role to users who initiate, approve and view established relationships between a Correspondent and their Aggregator.

New Fannie Mae Non-Sellers

New Fannie Mae Non-Sellers must use the UCDP/CU registration process for Non-Seller Correspondents before they can access the UCD solution. You will need to register for both UCDP and Collateral Underwriter credentials. Once this process is complete, you can then register for the UCD solution.

Based on your current credentials, you may need to register for up to three applications. Below is a summary of the technology applications you may need to register for based on the Fannie Mae Non-Seller category:

Type of Non-Seller	Applications to Register For
Existing Fannie Mae UCDP/CU	1. Register for UCD
Existing Fannie Mae Non-Sellers UCDP Only	1. Register for CU 2. Register for UCD
New Fannie Mae Non-Sellers	1. Register for UCDP 2. Register for CU 3. Register for UCD

Step 1 – Register for UCDP Access

1. On the FannieMae.com Home page, click **Single-Family Mortgages**
2. Click **Technology Solutions**
3. Under Technology, [Uniform Collateral Data Portal](#)
4. Under Access, open the **How to Register for UCDP** document
5. Refer to the **Correspondents (Non-Seller/Service) that do not have an existing Fannie Mae Seller/Service Number** section of the document.



NOTE: The process takes approximately 7-10 business days to be issued registration for UCDP.

Step 2 – Register for Collateral Underwriter

Once you have received UCDP credentials, follow the steps below to register for Collateral Underwriter:

1. On the FannieMae.com Home page, click **Single-Family Mortgages**
2. Click **Technology Solutions**
3. Under Technology, Click [Collateral Underwriting \(CU\)](#)
4. Under Access, open the **CU Non-Seller Implementation Guide**



5. Refer to **Step 2 – Complete Contracting, Registration, and CU User Setup** section of this document
6. Once the contract and registration process are complete, your UCDP Lender Administrator – who is now also setup as a Technology Manager Corporate Administrator – can officially 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 to use the UCD solution. Once this is complete, UCD will be available as an “Active Application Managed” technology solution. Administrators will then be able to grant access to the UCD solution for specific user profiles as needed.

1. On the FannieMae.com Home page, click **Single-Family Mortgages**
2. Click **Technology Solutions**
3. Under Support for Registered Users, Click [Technology Manager](#)
4. Click **LAUNCH APP** and log in
5. Complete the steps to add the UCD Collection Solution for that user.

When requesting access to the UCD collection solution, you can also request access for the UCD Test environment. In Technology Manager the Administrator will find the “UCD CLVE” link from the list of available applications, select this to provide access users within your company. All users **must** have the UCD_SUBMIT role. You can provision the UCD_ADMIN role to users who initiate, approve and view established relationships between a Correspondent and their Aggregator.



NOTE: *Technology Manager Corporate Administrator and User Administrators have the ability to set up, and manage user profiles for accessing Fannie Mae technology applications. Administrators can grant and remove access for UCD users, as they find appropriate. For additional guidance, refer to the supporting documentation and Job Aids found on the [Technology Manager page](#).*

Grant Access in Technology Manager

The Technology Manager Job Aid [Grant a User Access to an Application](#) will explain how to enable a user’s access to a specific Fannie Mae Technology. Look for **UCD** and **UCD CLVE** for gaining access to UCD Collection Solution and the UCD Test environment. For assistance contact Fannie Mae at 800-2FANNIE (800-232-6643) or via technology_manager_request@fanniemae.com.

Additional Resources

For registration assistance access to other resources, visit the pages below.

Application	Bookmark this Page	Support Options
UCD solution	https://singlefamily.fanniemae.com/applications-technology/uniform-closing-dataset-collection-solution	UCD@fanniemae.com or Fannie Mae Representative
Technology Manager	https://singlefamily.fanniemae.com/applications-technology/technology-manager	800-2FANNIE (800-232-6643) or technology_manager_request@fanniemae.com



Application	Bookmark this Page	Support Options
Loan Delivery	https://singlefamily.fanniemae.com/applications-technology/loan-delivery	800-2FANNIE
UCDP	https://singlefamily.fanniemae.com/applications-technology/uniform-collateral-data-portal	800-2FANNIE or UCDP_setup@fanniemae.com
Collateral Underwriter (CU)	https://singlefamily.fanniemae.com/applications-technology/collateral-underwriter	800-2FANNIE
Desk Underwriter (DU)	https://singlefamily.fanniemae.com/applications-technology/desktop-underwriter-desktop-originator	800-2FANNIE (800-232-6643) or technology_manager_request@fanniemae.com

Technology Manager

The Technology Manager Job Aid [Grant a User Access to an Application](#) will explain how to enable a user's access to a specific Fannie Mae Technology. Look for **UCD** and **UCD CLVE** for gaining access to UCD Collection Solution and the UCD Test environment. For assistance contact Fannie Mae at 800-2FANNIE (800-232-6643) or via technology_manager_request@fanniemae.com.