

## Shared credential access change to whole loan purchase advice reports

Thank you for making this important shared credential access change for the Whole Loan Purchase Advice (WLPA) reports in Fannie Mae Connect™. This update will help protect your organization's data by limiting the third party organization's access to just the WLPA reports.

Please complete the steps below by **Feb. 12, 2021**. Contact our [Customer Access Shared Service \(CASS\) team](#) with any questions.

**Step 1: Identify how the user ID is being used.** *Determine which description below best describes how the impacted user ID is set up and being used by both your organization and the third-party organization.*

**Lender A:** Lenders who have a user ID that is actively being used by both their organization (to access Fannie Mae applications) and the third-party organization (to access WLPA reports) and would like to keep the user ID active.

**Lender B:** Lenders who have a user ID that is actively being used by the third-party organization **only** to access the WLPA Reports and is **not** being used within their organization to access Fannie Mae applications.

**Step 2: Change shared credential access.** *Follow the steps below based on the Step 1 description that best describes your organization.*

### Lender A

In this scenario, your Corporate Administrator will create a new user ID in Technology Manager and your Report Administrator will create a Custom Report Category in Fannie Mae Connect to limit the third party organization's access to only the WLPA reports.

1. **Corporate Administrator in Technology Manager**
  - a. Set up a new user ID for the third-party organization to use when accessing the WLPA reports. Refer to the [Create a New User Job Aid](#) for assistance with this step.
  - b. Assign the Fannie Mae Connect application and General Reports User Role to the user ID. Refer to the [Grant a User Access to an Application Job Aid](#) for assistance with this step.
  - c. Important Notes:
    - i. No other role should be assigned to this new user ID.
    - ii. As a security measure, we recommend that you reset the password for the original user ID that was being used by the third-party organization to access the WLPA reports.
2. **Report Administrator in Fannie Mae Connect**
  - a. Within Fannie Mae Connect, create a new Custom Report Category via the Report Administration tab.
  - b. Assign the WLPA reports to the new Custom Report Category.
  - c. Assign the new user ID that was set up in the prior steps to the new Custom Report Category.

### Lender B

In this scenario, your Corporate Administrator will reduce the third party organization's access to the associated user ID in Technology Manager and your Report Administrator will create a Custom Report Category in Fannie Mae Connect to limit the third party organization's access to only the WLPA reports.

1. **Corporate Administrator in Technology Manager**
  - a. Remove all application and role access for the user ID being used by the third-party organization. Refer to the [Remove a User's Access to an Application Job Aid](#) for assistance with this step.
  - b. Assign the Fannie Mae Connect application and General Reports User Role to the user ID. Refer to the [Grant a User Access to an Application Job Aid](#) for assistance with this step.
2. **Report Administrator in Fannie Mae Connect**
  - a. Within Fannie Mae Connect, create a new Custom Report Category via the Report Administration tab.
  - b. Assign the WLPA reports to the new Custom Report Category.
  - c. Assign the user ID to the new Custom Report Category.

**Both scenarios:** Refer to the [Creating and Managing Custom Report Categories Job Aid](#) for step-by-step instructions and helpful tips.