



# Loan Delivery Quick Start for Whole Loans Checklist

This checklist references what's covered in the online Quick Start. Keep it handy as you prepare to use Loan Delivery for the first time.

## Preparing to Use Loan Delivery

This section of the Quick Start covered key steps you need to complete prior to using Loan Delivery for the first time.

### Review Your Data File Prior to Export

These are the data elements you need to have in your system prior to exporting:

- Financial Institution Number/Document Custodian ID
- Servicer Number/Servicer ID
- Servicer Loan Identifier/Servicer Loan ID
- Wire Nickname/Warehouse Lender ID
- Warehouse Lender (if applicable)
- Lender Loan Number/Seller Loan ID
- Date of Mortgage Note/Note Date
- Seller Number/Seller ID

### Ensure You Have Access to Fannie Mae Applications

- Loan Delivery
- Fannie Mae Connect

### Complete Forms Needed for Loan Delivery

- Master Custodial Agreement, Form 2017
- Certificate of Authority, Incumbency & Specimen Signatures, Form 360
- Seller's Designation of Wire Transfer Instructions, Form 482
- Authorization of Automatic Transfer of Funds, Form 1072

## Practice Using Loan Delivery

This section of the Quick Start provided tutorials for you to practice using Loan Delivery.

### Logging in to Loan Delivery

### Updating Your Seller Profile

### Main Navigation

### Importing a Loan

### Resolving Edits

### Submitting a Loan

### Accessing Reports



## Next Steps

This section of the Quick Start covered steps you will take upon submitting your loan to Fannie Mae.

- Endorse Note**
- Register Security Instrument with MERS**
- Assign Security Instrument, if *not* registered in MERS**

## Additional Resources

This section of the Quick Start covered provided helpful resources as you continue to use Loan Delivery.

### Resources

- Loan Delivery Learning Center
- Loan Delivery Portal Page
- Information on the data on the Commitment Detail and Loan Detail screens:
  - Commitment Details Page
  - Loan Details Page
- Seller/Servicer-Initiated Post-Purchase Adjustments
- Fannie Mae Selling Guide
- Fannie Mae Guide Forms

### Who to Contact

Pricing, commitments, extensions, pair-offs: Capital Markets Pricing and Sales Desk	800-752-0257
Fannie Mae technology application assistance	800-2FANNIE(232-6643), press 1 and select option 1
Selling Guide questions	800-2FANNIE, press 1 and select option 2, then enter the first five digits of your Seller number
Loan Delivery & Custody Helpline	800-2FANNIE, press 1 and select option 4 email: <a href="mailto:acquisitions_loan_delivery@fanniemae.com">acquisitions_loan_delivery@fanniemae.com</a>
Bailee Letter or Certification Helpline	800-2FANNIE, press 1 and select option 5
Servicing Guide questions and servicing-related questions	800-2FANNIE, press 1 and select option 3 email: <a href="mailto:servicing_solutions@fanniemae.com">servicing_solutions@fanniemae.com</a>
Reporting, remitting and reconciliation assistance	800-2FANNIE, press 1 and select option 6 email: <a href="mailto:master_solutions@fanniemae.com">master_solutions@fanniemae.com</a>