

Quick Exchange – Manage Contacts User Guide

July 2023





Quick Exchange – Manage Contacts User Guide Overview

In order for Loan Quality Connect to successfully send systemic email correspondence on loan file documentation requests, repurchase demands, data validation and/or self-reports, contact data must be submitted and maintained using these guidelines:

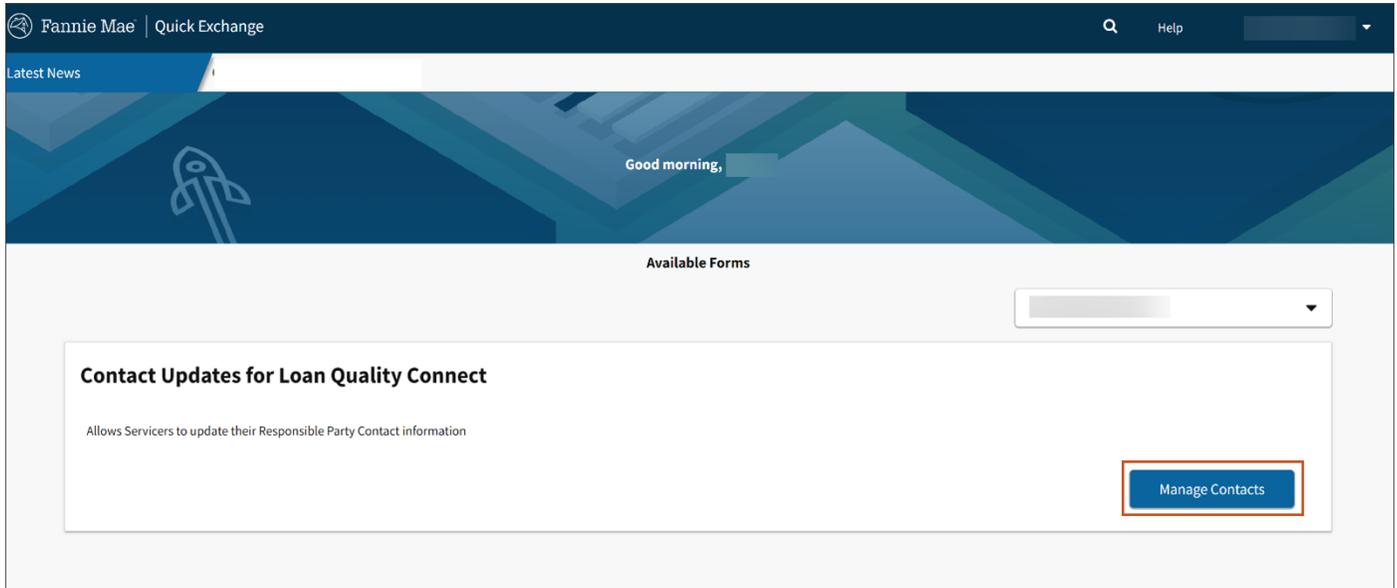
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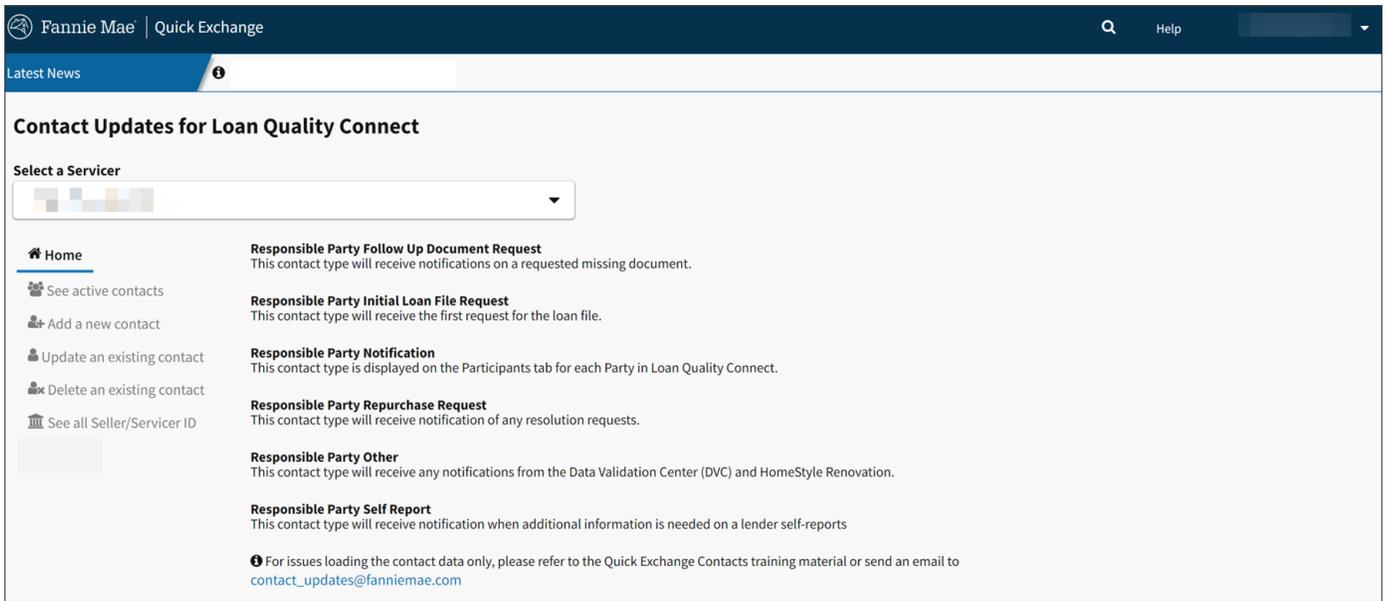


Accessing Contact Updates for Loan Quality Connect

1. Access [Quick Exchange](#).
2. Click **Manage Contacts**.



Result: The Contact Updates for Loan Quality Connect screen appears.



NOTE: Each 9-digit Servicer number is required to have at least **one** contact list for **each** contact date type listed.



Existing List of Active Contacts

Select your **Servicer Name** from the Select a Servicer field.

The screenshot shows the 'Contact Updates for Loan Quality Connect' page. At the top, there is a navigation bar with 'Fannie Mae | Quick Exchange', a search icon, and a 'Help' link. Below the navigation bar is a 'Latest News' section with an information icon. The main heading is 'Contact Updates for Loan Quality Connect'. A dropdown menu labeled 'Select a Servicer' is highlighted with a red box and contains the text 'Choose Servicer'. To the left of the main content is a sidebar with a 'Home' icon and several menu items: 'See active contacts', 'Add a new contact', 'Update an existing contact', 'Delete an existing contact', and 'See all Seller/Servicer ID'. The main content area lists five contact types with their descriptions:

- Responsible Party Follow Up Document Request**: This contact type will receive notifications on a requested missing document.
- Responsible Party Initial Loan File Request**: This contact type will receive the first request for the loan file.
- Responsible Party Notification**: This contact type is displayed on the Participants tab for each Party in Loan Quality Connect.
- Responsible Party Repurchase Request**: This contact type will receive notification of any resolution requests.
- Responsible Party Other**: This contact type will receive any notifications from the Data Validation Center (DVC) and HomeStyle Renovation.
- Responsible Party Self Report**: This contact type will receive notification when additional information is needed on a lender self-reports.

 At the bottom of the main content area, there is a note: 'For issues loading the contact data only, please refer to the Quick Exchange Contacts training material or send an email to contact_updates@fanniemae.com'.

NOTE: If your Fannie Mae credentials provide access to multiple servicers, select your Servicer Name before proceeding.

Active Contacts

Click **See active contacts** to view a list of all active contacts.

The screenshot shows the 'All Active Contacts' page. At the top, there is a navigation bar with 'Fannie Mae | Quick Exchange', a search icon, and a 'Help' link. Below the navigation bar is a 'Latest News' section with an information icon and a yellow banner that says 'App-independent message.'. The main heading is 'Contact Updates for Loan Quality Connect'. A dropdown menu labeled 'Select a Servicer' is visible. To the left of the main content is a sidebar with a 'Home' icon and several menu items: 'See active contacts' (highlighted with a red box), 'Add a new contact', 'Update an existing contact', 'Delete an existing contact', and 'See all Seller/Servicer ID'. The main content area is titled 'All Active Contacts' and shows a table with the following columns: 'Seller/Servicer #', 'Contact First Name', 'Contact Last Name', 'Contact Type', 'Primary Email', and 'Primary Phone'. The table is filtered to show 'Showing 1 to 25 of 204 entries'. Below the table, there are several rows of contact data, each with a small profile picture icon. The table has search filters for 'Servicer ID', 'First Name', 'Last Name', 'Contact Type', and 'Primary Email'.



Filter Contact Data

Use the filters either individually or in multiples to filter data as desired.

Showing 1 to 4 of 4 entries

Seller/Service #	Contact First Name	Contact Last Name	Contact Type	Primary Email	Primary Pho
Service ID		Last Name	Contact Type	Primary Ei	

Export Contact Data

Click **Export** to export the filtered data to a downloadable version to a .csv format.

Click **Export All** to export the complete contact data set to a downloadable version to a .csv format.

Home

See active contacts

- Add a new contact
- Update an existing contact
- Delete an existing contact
- See all Seller/Service ID

All Active Contacts

Showing 1 to 4 of 4 entries

Seller/Service #	Contact First Name	Contact Last Name	Contact Type	Primary Email	Primary Pho
Service ID		Last Name	Contact Type	Primary Ei	

1 25

Export **Export All**



Add a New Contact

1. Click **Add a new contact**.
2. Enter information in **all applicable fields**.

Home

See active contacts

Add a new contact

Update an existing contact

Delete an existing contact

See all Seller/Service ID

Add new Responsible Party Contact

Contact Information

All Seller/Service ID numbers are required to have at least one contact for each contact type

First Name

Last Name

Phone Number

Secondary Phone Number optional

Email Address

Select Contact Type(s)

<input type="checkbox"/> Select All	<input type="checkbox"/> ResponsiblePartyInitialLoanFileRequest
<input type="checkbox"/> ResponsiblePartyFollowUpDocumentRequest	<input type="checkbox"/> ResponsiblePartyOther
<input type="checkbox"/> ResponsiblePartyNotification	<input type="checkbox"/> ResponsiblePartyRepurchaseRequest
<input type="checkbox"/> ResponsiblePartySelfReport	

Select Service ID(s)

Select All

NOTE: No web-based email addresses are allowed (i.e., gmail.com, yahoo.com, etc.) Each point of contact is required to be added individually, enter full name, and avoid adding only initials. Group mailboxes are allowed, to add please enter the First & Last Name in compliance with the mailbox's name as this is a requirement for the system. Once the contact has been added, the corresponding contact will be added live in Quick Exchange, however it will take 24-48 business hours to complete the add cycle on all other applicable Fannie Mae systems.



Update an Existing Contact

1. Click **Update an existing contact**.
2. Click **Select** to the right of the desired contact to update.

The screenshot shows the 'Edit Responsible Party Contact' page in the Fannie Mae Quick Exchange system. The left sidebar contains navigation options: Home, See active contacts, Add a new contact, **Update an existing contact** (highlighted with a red box), Delete an existing contact, and See all Seller/Service ID. The main content area has a 'Reset Filter' button and a table of contacts. The table has columns for First Name, Last Name, Email, and Edit Contact. The 'Edit Contact' column contains 'Select' buttons for each contact, with the top one highlighted by a red box. The table shows 5 entries, with the first one being the contact being edited.

3. Update appropriate fields and select/deselect **all** applicable check boxes.

The screenshot shows the 'Edit Responsible Party Contact' form. The left sidebar has the same navigation options as the previous screenshot. The main content area is divided into sections: 'Contact Information', 'Edit Contact Type(s)', and 'Edit Servicer ID(s)'. The 'Contact Information' section is highlighted with a red box and contains fields for First Name, Last Name, Phone Number, Secondary Phone Number (optional), and Email Address. The 'Edit Contact Type(s)' section is highlighted with a red box and contains a list of checkboxes: 'Select All', 'ResponsiblePartyInitialLoanFileRequest', 'ResponsiblePartyOther' (checked), 'ResponsiblePartyRepurchaseRequest' (checked), 'ResponsiblePartyFollowUpDocumentRequest' (checked), 'ResponsiblePartyNotification' (checked), and 'ResponsiblePartySelfReport'. The 'Edit Servicer ID(s)' section is highlighted with a red box and contains a checkbox for 'Unselect All' (checked) and a checkbox for a specific servicer ID (checked). At the bottom, there are 'Back' and 'Save' buttons.

4. Click **Save**.



5. Click **Save** in confirmation pop-up box.



NOTE: One you click **Save** the corresponding contact will be updated live in Quick Exchange, however it will take 24 – 48 business hours to complete the update cycle on all other applicable Fannie Mae systems.

NOTE: Important! If a contact needs to be deleted (i.e., no longer with the company) use the following **Delete an existing contact option** only.

Delete an Existing Contact

If a contact needs to be deleted (i.e., no longer with the company) use the following steps.

1. Click **Delete and existing contact** from the left menu.

The screenshot shows the Fannie Mae Quick Exchange interface. The top navigation bar includes the Fannie Mae logo, 'Quick Exchange', a search icon, and 'Help'. Below the navigation bar is a 'Latest News' section. The main content area is titled 'Contact Updates for Loan Quality Connect' and features a 'Select a Servicer' dropdown menu. On the left side, there is a navigation menu with options: Home, See active contacts, Add a new contact, Update an existing contact, **Delete an existing contact** (highlighted with a red box), and See all Seller/Servicer ID. The main content area is titled 'Delete Existing Contact' and includes a 'Reset Filter' button. Below this is a table with columns for 'First Name', 'Last Name', 'Email', and 'Delete Contact'. The table contains five rows of contact information, each with a 'Select' button in the 'Delete Contact' column. The text 'Showing 1 to 5 of 5 entries' is displayed at the top right of the table.

First Name	Last Name	Email	Delete Contact
First Name	Last Name	Primary Email	Select
			Select



2. Select the **Contact** that needs to be deleted.

Fannie Mae | Quick Exchange

Latest News

Contact Updates for Loan Quality Connect

Select a Servicer

- Home
- See active contacts
- Add a new contact
- Update an existing contact
- Delete an existing contact**
- See all Seller/Servicer ID

Delete Existing Contact

Reset Filter

Showing 1 to 5 of 5 entries

First Name	Last Name	Email	Delete Contact
First Name	Last Name	Primary Email	
			Select

3. Validate the contact is correct, click **Delete**.

Fannie Mae | Quick Exchange

Latest News

Contact Updates for Loan Quality Connect

Select a Servicer

- Home
- See active contacts
- Add a new contact
- Update an existing contact
- Delete an existing contact**
- See all Seller/Servicer ID

Delete Existing Contact

Contact Information

First Name: [Text Field]

Last Name: [Text Field]

Phone Number: [Text Field]

Secondary Phone Number (optional): [Text Field]

Email Address: [Text Field]

Back Delete



4. Validate that the contact to be deleted is correct, click **Delete**.

Warning! ×

This contact will no longer receive systemic email notifications from the Loan Quality Connect System. Click the delete button to proceed.

Go back Delete

NOTE: The following deletion confirmation pop-up box will appear confirming the deletion.

Success ×

Your party contact deletion has been successfully processed

NOTE: Once you click **Delete** the corresponding contact will be deleted live in Quick Exchange, however it will take 24 – 48 business hours to complete the deletion cycle on all other applicable Fannie Mae systems.



See all Seller/Servicer Identification Numbers

Click **See all Seller/Servicer ID** on the left menu.

The screenshot shows the Fannie Mae Quick Exchange interface. At the top, there is a navigation bar with 'Fannie Mae | Quick Exchange' and a search icon. Below this is a 'Latest News' section. The main content area is titled 'Contact Updates for Loan Quality Connect'. On the left, there is a sidebar menu with options: Home, See active contacts, Add a new contact, Update an existing contact, Delete an existing contact, and 'See all Seller/Servicer ID' (highlighted with a red box). The main content area is titled 'All Servicer IDs' and shows 'Data as of Jun 08, 2023'. It displays a table with one entry for 'Seller/Servicer #' and a search box for 'Servicer Id'. The table is currently showing 1 of 1 entry. An 'Export' button is located at the bottom right of the table area.

NOTE: This will display all the Seller/Servicer ID numbers that can be accessed based on your Fannie Mae credentials.

NOTE: To export the entire list of Seller/Servicer ID number, click **Export** and the downloadable list will be downloaded in .csv format.

For questions and/or issues regarding access to Quick Exchange and for additional information in regard to managing contact data for the Loan Quality Connect System (LQCS), please dial the **1-800-FannieMae2** number.