Fannie Mae

Provisioning Access to Ask Poli

Poli knows. Just ask.

User Admin Guide

Ask Poli® is an intelligent business tool designed to assist Fannie Mae's approved business partners to quickly get answers straight from the source.

To access Ask Poli, each broker user will need their own Fannie Mae (FM) User ID with appropriate Ask Poli permissions. As a User Administrator, you will use Technology Manager to provision Fannie Mae User IDs for your users that require access to Ask Poli.

Note: Creating a Fannie Mae User ID **does not** inherently provide access to technology applications which are provisioned by the User Administrator in Technology Manager.

With Ask Poli, there are three easy ways for brokers to get answers to their questions:

Let Ask Poli predict the answer you need

Type in your question or keyword(s) in the search bar and look for autocomplete suggestions right underneath.

Choose from a list of search results

Type in your question or keyword(s) in the search bar and press "Enter" to see a list of articles.

Use navigational icons to get answers

Use the icons which represent the mortgage loan life cycle, at the top of the page to browse selling and servicing.

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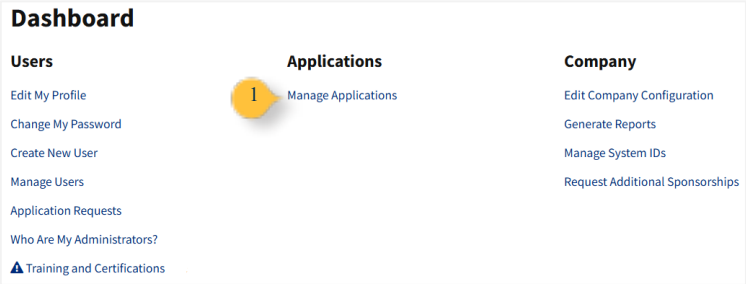
Provisioning Process Overview

This job aid provides User Administrators (UA) with guidance for setting up the Ask Poli application and granting a user access to the Broker role.

Set Up Access to the Ask Poli Application

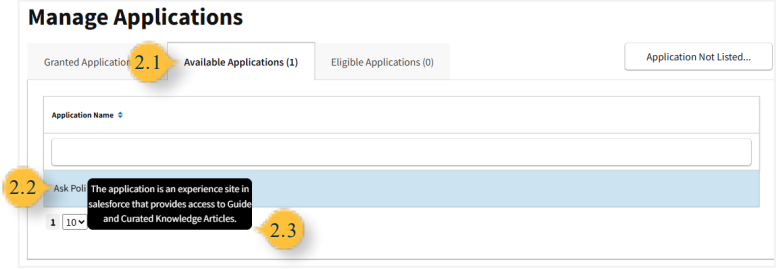
Note: By granting a user group access to an application, users in the group are NOT automatically given access to the application. After completing this procedure, you will need to grant users access to the application (see next set of instructions).

1. From the dashboard, click the **Manage Applications** link. The Manage Applications screen appears with a list of active applications.

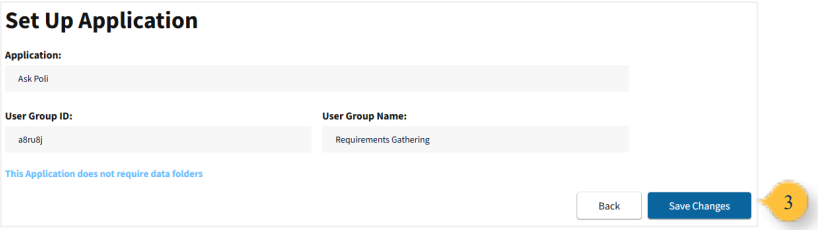


2. Select the **Available Applications** tab to view all applications the UA may set up as a Granted Application. Select Ask Poli.

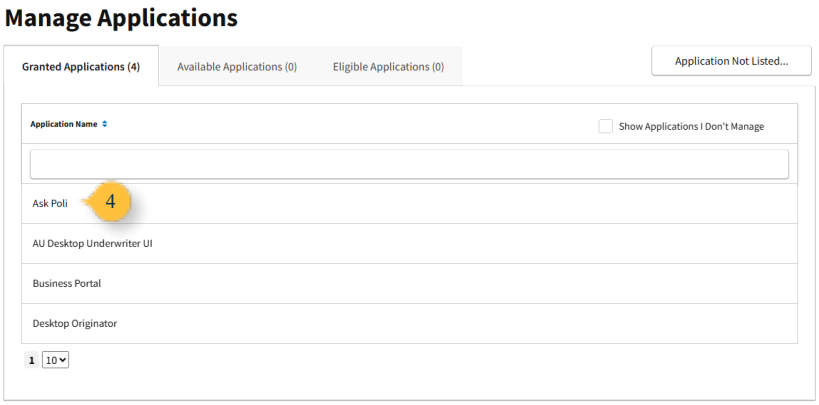
   Note: Hover over each application for an application description.



3. The Set Up Application screen will appear. Select **Save Changes**.



4. Once submission is successful, the *Ask Poli* application will be displayed under the Granted Applications tab.



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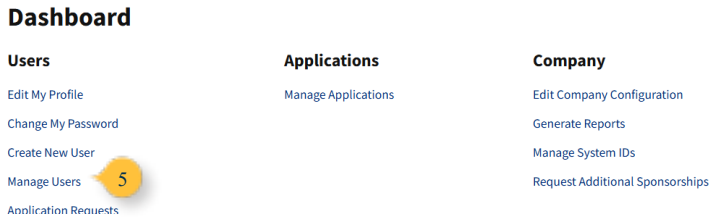
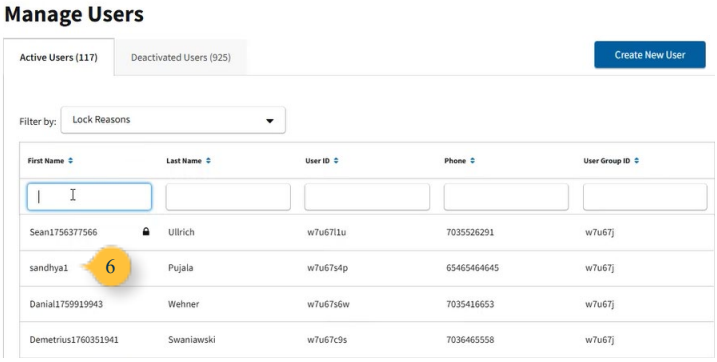
Granting a User Access to the Broker Role

Note: Before assigning user access to the Broker role and Ask Poli application, User Administrators will need to verify that they have set up the Ask Poli application for their organization and granted user group access to the Ask Poli application.

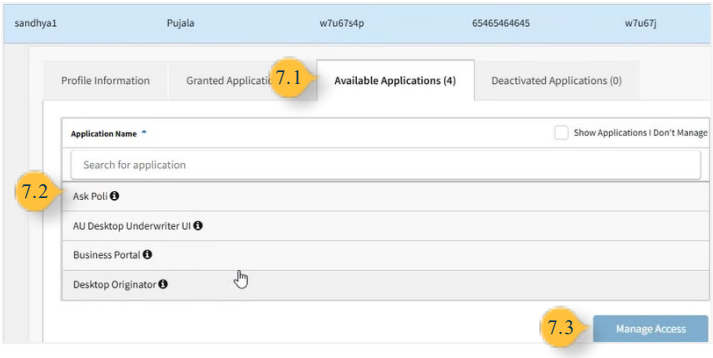
5. Once the application has been granted, the next step is to provision access to a user(s). From the dashboard, select **Manage Users** to provision Ask Poli to a user.



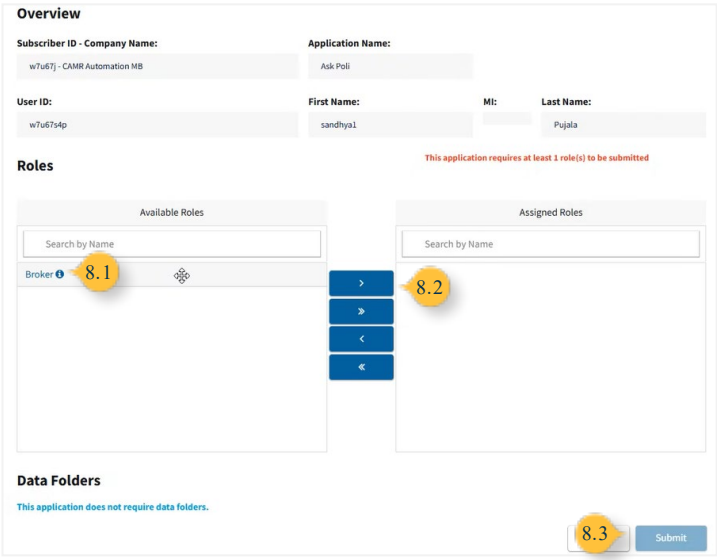
6. Select a user.



7. From the **Available Applications** tab, select *Ask Poli* then **Manage Access**.



8. In Available Roles, select **Broker** and then the **>** to move to Assigned Roles. Click **Submit**.



Repeat steps 6-8 to add the *Ask Poli* application Broker role for additional users.

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Frequently Asked Questions

Q1 Why do users have to log in with a Fannie Mae User ID and password?

Fannie Mae is committed to information security best practices. Consistent with other Fannie Mae applications, a FM User ID and password are required to access Ask Poli.

Q2 What is a System ID? What is a User ID?

System IDs are intended to be used for application-to-application integrations and should not be used to access the user interface of a Fannie Mae application. A User ID allows a single end user to access a Fannie Mae application. Learn more on the Technology Manager Job Aid.

Q3 How can I easily create more than one User ID?

The Technology Manager Virtual Assistant can create up to five new User IDs in one session as well as copy one user's application and role access to another user's profile. Access the Virtual Assistant by clicking the icon in the bottom right-hand corner of your Technology Manager dashboard.

Q4 How long does it take for a user to gain access to Ask Poli after the role is assigned?

Once a User Administrator assigns the Broker role to a user, it may take up to 24 hours for provisioning to complete in Salesforce and for the content to become available in Ask Poli.

Troubleshooting and Support

The Technology Support Center is the primary point of contact for Fannie Mae customers seeking information on or assistance with Fannie Mae technology applications. Reach out to us via phone or web chat using the links below or try using our online search to answer your question.

Please note that the Web Chat link is only available to registered technology application users.

Call us at 1-800-2FANNIE
(1-800-232-6643)

Open a Web Chat →

https://singlefamily.fanniemae.com/applications-technology/ask-poli

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