![Fannie Mae®]

Ask Poli Job Aid for Corporate Admins

Ask Poli is being updated to enhance the user experience and enable future functionality including expanded search capabilities, bringing together Selling and Servicing topics, and leveraging Fannie Mae's Single Sign-On. Pocket Poli, an Ask Poli solution integrated with a lender's intranet/extranet, will be retired April 23, 2024.

To continue using Ask Poli® after April 22, 2024, users will need their own Fannie Mae (FM) User ID with appropriate Ask Poli permissions. As a Corporate Administrator, we are asking you to provision Fannie Mae User IDs for your users that require uninterrupted access to Ask Poli.
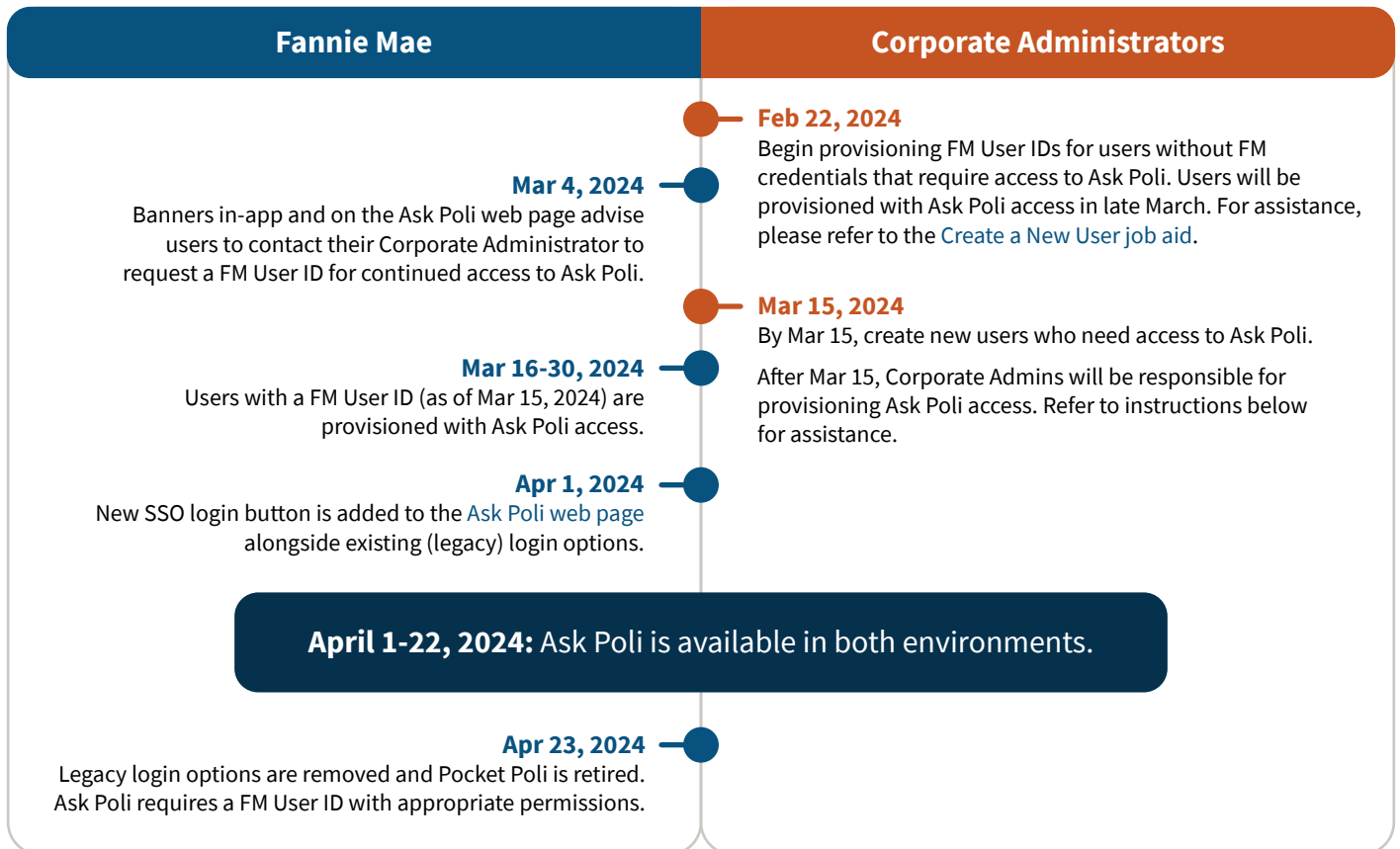
Note: Creating a Fannie Mae User ID **does not** inherently provide access to technology applications (e.g. Desktop Underwriter® or Condo Project Manager™) which are provisioned by the Corporate Administrator in Technology Manager.

Fannie Mae's Ask Poli is a search tool that helps mortgage sellers and servicers quickly find answers to policy-related questions, with responses straight from the source. In April, we are updating Ask Poli to:

- expand search capabilities — introducing keyword and theme-based searching

- bring together Selling and Servicing topics, for seamless navigation through the full loan life cycle

- leverage Fannie Mae's Single Sign-On (SSO), consistent with other Fannie Mae applications

Pocket Poli, an Ask Poli solution integrated with a lender's intranet/extranet, will be retired April 23, 2024.

Ask Poli Update Timeline

Fannie Mae	Corporate Administrators

Feb 22, 2024
Begin provisioning FM User IDs for users without FM credentials that require access to Ask Poli. Users will be provisioned with Ask Poli access in late March. For assistance, please refer to the Create a New User job aid.

Mar 4, 2024
Banners in-app and on the Ask Poli web page advise users to contact their Corporate Administrator to request a FM User ID for continued access to Ask Poli.

Mar 15, 2024
By Mar 15, create new users who need access to Ask Poli.

After Mar 15, Corporate Admins will be responsible for provisioning Ask Poli access. Refer to instructions below for assistance.

Mar 16-30, 2024
Users with a FM User ID (as of Mar 15, 2024) are provisioned with Ask Poli access.

Apr 1, 2024
New SSO login button is added to the Ask Poli web page alongside existing (legacy) login options.

April 1-22, 2024: Ask Poli is available in both environments.

Apr 23, 2024
Legacy login options are removed and Pocket Poli is retired. Ask Poli requires a FM User ID with appropriate permissions.

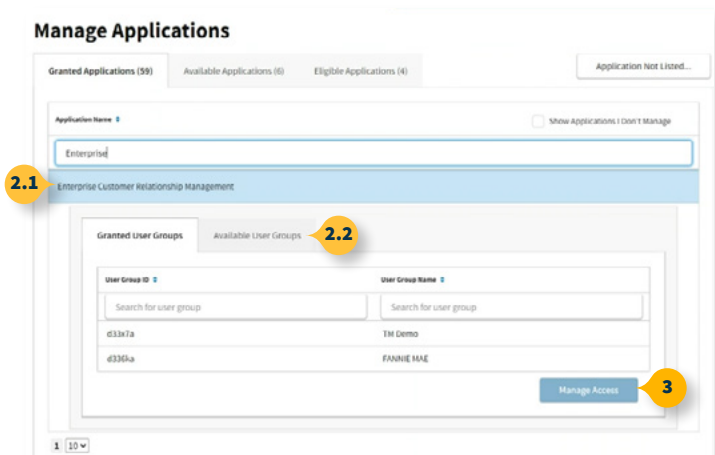# Provisioning Process Overview

This job aid provides Corporate Administrators with guidance for granting a user group access to the Enterprise Customer Relationship Management (ECRM) application and granting a user access to the Ask Poli role.

Granting a User Group Access to the ECRM Application

Review the Grant a User Group Access to an Application job aid for a more detailed explanation on how to add an application to the list of Fannie Mae Technology applications a user group can access.
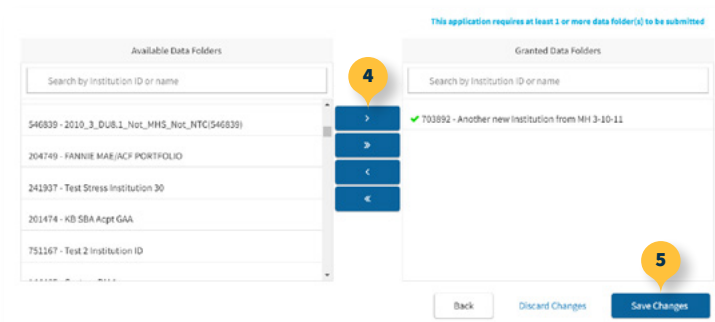
> **Note:** By granting a user group access to an application, users in the group are <u>NOT</u> automatically given access to the application. After completing this procedure, you will need to grant users access to the application (see next set of instructions).

1. From the dashboard, click the **Manage Applications** link.

2. The Manage Applications screen appears with a list of active applications. Select from the Active Applications list *Enterprise Customer Relationship Management* to be added to the user group's list of Available Applications. Then, click the **Available User Groups** tab.

3. Select the user group you wish to add to an application. Then click **Manage Access**.

> **Note:** If you do not see Enterprise Customer Relationship Management listed under "Available Applications" please review the Set Up an Available Application job aid.

4. The Set Up Application screen appears. In the **Available Data Folders** pane, select the data folder(s) you wish to assign to the user group, then click the **Add Arrow** button.

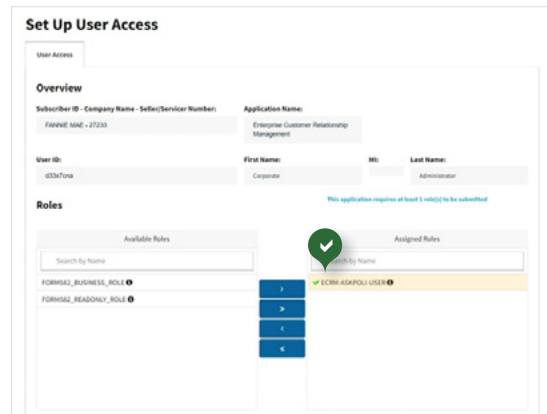5. The selected data folder(s) will be added to the Granted Data Folders pane. Click **Save Changes** to save the changes made.
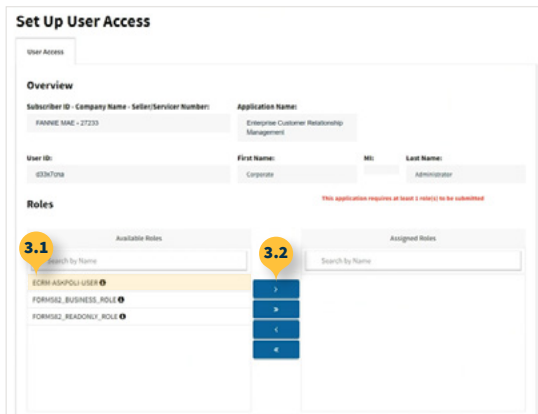
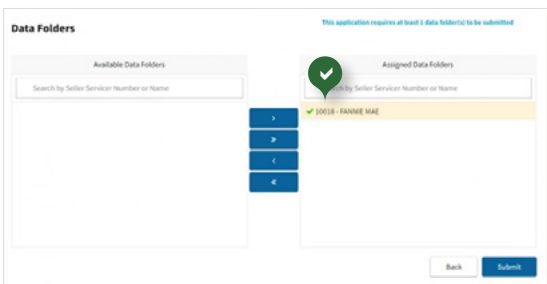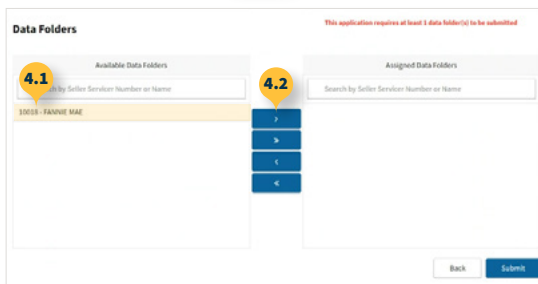# Granting a User Access to the Ask Poli Role

> **Note:** Before assigning user access to the Ask Poli role and ECRM application, Corporate Administrators will need to verify that they have set up the ECRM application for their organization and granted user group access to the ECRM application. For more instructions, please review the Set Up an Available Application job aid and the Grant a User Group Access to an Application job aid.

Review the Grant a User Access to an Application job aid for a more detailed explanation on how to enable a user's access to a specific Fannie Mae Technology application using the traditional Technology Manager process.

1. Select the desired user record. The profile Information for the selected user record appears. Click the **Available Applications** tab.

2. Select the *Enterprise Customer Relationship Management* application to assign to the user, then click **MANAGE ACCESS**.

3. The Set Up User Access screen appears. In the Roles section, select *ECRM-ASKPOLI-USER*, then click the **Add Arrow** button.

4. In the Data Folder section, select the data folder(s) the user will be able to access, then click the **Add Arrow** button.

5. Click **SUBMIT**.

6. A confirmation window appears. Click **CONTINUE** to save your changes.

> **Note:** The Technology Manager Virtual Assistant can walk you through the end-to-end process for creating up to five new users at once and for granting application access. Using the Virtual Assistant, you can also duplicate a list of applications to which one user has access in another user's profile and grant that user access to the same set of applications.

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 will be required to access Ask Poli beginning April 23, 2024.

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 **Who do I contact if I have questions?**

The Technology Support Center is available to answer questions related to Fannie Mae technology applications and can be reached at 1-800-2FANNIE (1-800-232-6643).

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 →