



Quality Control Job Aid

October 2025



1. Navigate the following path:

-> *Lender Information*

-> *Roles in Your Organization*

Lender Information

Roles in Your Organization

All mandatory roles must have at least **one** contact assigned to verify this section. The same contact can also be assigned to multiple roles. Please be sure to check for existing contacts before choosing to add a new contact.

***Mandatory Role**

▼ * Chief Executive Officer/President 1	+ Existing Contact	+ New Contact
▼ * Chief Financial Officer 1	+ Existing Contact	+ New Contact
▼ * Chief Risk Officer 1	+ Existing Contact	+ New Contact
▼ * Head of Technology 1	+ Existing Contact	+ New Contact
▼ * Head of Quality Control		
▼ * Fidelity Bond, Errors & Omissions (FBE0) 1	+ Existing Contact	+ New Contact
▼ * Form 582 Submitter 1	+ Existing Contact	+ New Contact
▼ * Designated Recipient for Notices 1	+ Existing Contact	+ New Contact
▼ Head of Secondary Marketing 1	+ Existing Contact	+ New Contact
▼ Head of Underwriting 0	+ Existing Contact	+ New Contact
▼ Head of Servicing 0	+ Existing Contact	+ New Contact



2. Select the dropdown arrow for *Head of Quality Control* to display the following roles:

- *Head of Pre-Funding Quality Control*
- *Head of Post-Closing Quality Control*

Lender Information

Roles in Your Organization

All mandatory roles must have at least **one** contact assigned to verify this section. The same contact can also be assigned to multiple roles. Please be sure to check for existing contacts before choosing to add a new contact.

*Mandatory Role

▼ * Chief Executive Officer/President 1	+ Existing Contact	+ New Contact
▼ * Chief Financial Officer 1	+ Existing Contact	+ New Contact
▼ * Chief Risk Officer 1	+ Existing Contact	+ New Contact
▼ * Head of Technology 1	+ Existing Contact	+ New Contact
▲ * Head of Quality Control		
▼ * Head of Pre-Funding Quality Control (Originations only, not Servicing) 1	+ Existing Contact	+ New Contact
▼ * Head of Post-Closing Quality Control (Originations only, not Servicing) 1	+ Existing Contact	+ New Contact
▼ * Fidelity Bond, Errors & Omissions (FBEO) 1	+ Existing Contact	+ New Contact
▼ * Form 582 Submitter 1	+ Existing Contact	+ New Contact
▼ * Designated Recipient for Notices 1	+ Existing Contact	+ New Contact
▼ Head of Secondary Marketing 1	+ Existing Contact	+ New Contact



3. Click the dropdown arrow for *Head of Pre-Funding Quality Control*

Lender Information

Roles in Your Organization

All mandatory roles must have at least **one** contact assigned to verify this section. The same contact can also be assigned to multiple roles. Please be sure to check for existing contacts before choosing to add a new contact.

***Mandatory Role**

- ▼ * Chief Executive Officer/President 1 + Existing Contact + New Contact
- ▼ * Chief Financial Officer 1 + Existing Contact + New Contact
- ▼ * Chief Risk Officer 1 + Existing Contact + New Contact
- ▼ * Head of Technology 1 + Existing Contact + New Contact
- ▲ * Head of Quality Control
 - ▲ * Head of Pre-Funding Quality Control (Originations only, not Servicing) 0 + Existing Contact + New Contact

NAME	TITLE	EMAIL	ASSIGN
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- ▼ * Head of Post-Closing Quality Control (Originations only, not Servicing) 0 + Existing Contact + New Contact

- ▼ * Fidelity Bond, Errors & Omissions (FBEO) 1 + Existing Contact + New Contact
- ▼ * Form 582 Submitter 1 + Existing Contact + New Contact
- ▼ * Designated Recipient for Notices 1 + Existing Contact + New Contact
- ▼ * Head of Secondary Marketing 1 + Existing Contact + New Contact


4. Add a contact to the role of Head of Pre-Funding Quality Control. Choose 1 of the following options:

A. Existing Contact, or

B. New Contact

Do not create duplicate contacts.

Input the name of QC Manager who oversees the actual day-to-day administration of the prefunding QC process at the operational level.



First: Search *Existing Contact* list for QC Manager name & select name if listed



Next: If QC Manager name is not listed in *Existing Contact*, create the contact in *New Contact* & click *Save*

If a pre-existing contact name must be changed to reflect a new QC Manager name, click *Assign*  to deactivate the contact,  go to a different page to refresh the contact field, then return to *Roles in Your Organization*, & follow the contact entry instructions. The *Assign* button will automatically activate when the contact entry is completed. 



5. Click the dropdown arrow for *Head of Post-Closing Quality Control*

Lender Information

Roles in Your Organization

All mandatory roles must have at least **one** contact assigned to verify this section. The same contact can also be assigned to multiple roles. Please be sure to check for existing contacts before choosing to add a new contact.

*Mandatory Role

▼ * Chief Executive Officer/President 1	+ Existing Contact	+ New Contact												
▼ * Chief Financial Officer 1	+ Existing Contact	+ New Contact												
▼ * Chief Risk Officer 1	+ Existing Contact	+ New Contact												
▼ * Head of Technology 1	+ Existing Contact	+ New Contact												
^ * Head of Quality Control														
^ * Head of Pre-Funding Quality Control (Originations only, not Servicing) 0	+ Existing Contact	+ New Contact												
<table><thead><tr><th>NAME</th><th>TITLE</th><th>EMAIL</th><th>ASSIGN</th></tr></thead><tbody><tr><td colspan="4">▼ * Head of Post-Closing Quality Control (Originations only, not Servicing) 0</td></tr><tr><td>NAME</td><td>TITLE</td><td>EMAIL</td><td>ASSIGN</td></tr></tbody></table>			NAME	TITLE	EMAIL	ASSIGN	▼ * Head of Post-Closing Quality Control (Originations only, not Servicing) 0				NAME	TITLE	EMAIL	ASSIGN
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▼ * Designated Recipient for Notices 1	+ Existing Contact	+ New Contact												
▼ * Head of Secondary Marketing 1	+ Existing Contact	+ New Contact												



6. Add a contact to the role of Head of Post-Closing Quality Control. Choose 1 of the following options:

A. Existing Contact, or

B. New Contact

Do not create duplicate contacts.

Input the name of QC Manager who oversees the actual day-to-day administration of the post-closing QC process at the operational level.



First: Search *Existing Contact* list for QC Manager name & select name if listed



Next: If QC Manager name is not listed in *Existing Contact*, create the contact in *New Contact* & click *Save*

If a pre-existing contact name must be changed to reflect a new QC Manager name, click *Assign*  to deactivate the contact,  go to a different page to refresh the contact field, then return to *Roles in Your Organization*, & follow the contact entry instructions. The *Assign* button will automatically activate when the contact entry is completed. 



7. Navigate the following path:

-> **Mortgage Operations**

-> **Quality Control**

[Note: The QC Manager names previously entered into *Roles in Your Organization* now appear in the top section named *Roles*]

[< Contractors / Third Parties](#)[Third Party Originators >](#)

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles
These contacts can be updated in the **Roles in Your Organization** section.

Role	Name	
Head of Pre-Funding Quality Control	Kathy Smith	
Head of Post-Closing Quality Control	Kathy Smith	

Vendors
Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select **None**.

Vendor Type	Vendor Name	Edit
Pre-Funding Quality Control Vendor	None - 100% QC performed internally	✎
Post-Closing Quality Control Vendor	None - 100% QC performed internally	✎

☐ Verify this response

[^](#)



8. Scroll down to the section named *Vendors*

[Note: The column named *Vendor Name* automatically defaults to reflect “None – 100% QC performed internally”]

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name
Head of Pre-Funding Quality Control	Kathy Smith
Head of Post-Closing Quality Control	Kathy Smith

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select None.

Vendor Type	Vendor Name	Edit
Pre-Funding Quality Control Vendor	None - 100% QC performed internally	
Post-Closing Quality Control Vendor	None - 100% QC performed internally	

Verify this response



9. Lender does not contract with third-party QC service providers

If your organization does not contract with third-party QC service providers to perform tasks for the prefunding QC process and the post-closing QC process, check the box named *Verify this response* to complete this section

[< Contractors / Third Parties](#) [Third Party Originators >](#)

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles
These contacts can be updated in the **Roles in Your Organization** section.

Role	Name
Head of Pre-Funding Quality Control	Kathy Smith
Head of Post-Closing Quality Control	Kathy Smith

Vendors
Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select **None**.

Vendor Type	Vendor Name	Edit
Pre-Funding Quality Control Vendor	None - 100% QC performed internally	Edit
Post-Closing Quality Control Vendor	None - 100% QC performed internally	Edit

☒ Verify this response



10. Lender contracts with third-party QC service providers

If your organization contracts with third-party QC service providers to perform tasks for the prefunding QC process and/or the post-closing QC process, click either one of the pencil icons under the column named *Edit*

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name	
Head of Pre-Funding Quality Control	Kathy Smith	
Head of Post-Closing Quality Control	Kathy Smith	

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select **None**.

Vendor Type	Vendor Name	Edit
Pre-Funding Quality Control Vendor	None - 100% QC performed internally	
Post-Closing Quality Control Vendor	None - 100% QC performed internally	

☐ Verify this response



11. Lender contracts with third-party QC service providers

3 dropdown lists appear under the column for Pre-Funding Quality Control Vendor;
3 dropdown lists appear under the column for Post-Closing Quality Control Vendor

Use the dropdown lists
in the order they appear
starting with the first
dropdown list at the top.

Each dropdown list
activates in the order of
appearance.

Contractors / Third Parties

Third Party Originators >

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name	
Head of Pre-Funding Quality Control	Kathy Smith	
Head of Post-Closing Quality Control	Kathy Smith	

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select None.

Pre-Funding Quality Control Vendor

None - 100% QC performed internally

1

N/A

2

N/A

3

Post-Closing Quality Control Vendor

None - 100% QC performed internally

1

N/A

2

N/A

3

Cancel

Save

Verify this response

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12. Lender contracts with third-party QC service providers

Select QC vendor firm names from the dropdown lists

A maximum of 3 QC vendor firm names may be selected for the Pre-Funding Quality Control Vendor column.

A maximum of 3 QC vendor firm names may be selected for the Post-Closing Quality Control Vendor column.

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name
Head of Pre-Funding Quality Control	Kathy Smith
Head of Post-Closing Quality Control	Kathy Smith

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select None.

Pre-Funding Quality Control Vendor	Post-Closing Quality Control Vendor
None - 100% QC performed internally	Accenture
N/A	M&M Consulting
N/A	Xactus

Cancel Save

☐ Verify this response



13. Lender contracts with third-party QC service providers

Select *Other* from the corresponding column if the QC vendor firm name does not appear in the dropdown list

After selecting *Other* from the dropdown list click *Save*.

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name
Head of Pre-Funding Quality Control	Kathy Smith
Head of Post-Closing Quality Control	Kathy Smith

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select None.

Pre-Funding Quality Control Vendor

Post-Closing Quality Control Vendor

Other - Contact fanniemae_alignwithqc@fanniemae.com to request addition of a QC vendor

None - 100% QC performed internally

N/A

N/A

N/A

N/A

Cancel

Save

☐ Verify this response



14. Lender contracts with third-party QC service providers

Request addition of the QC vendor firm name to the dropdown lists

Click the active email address link & send a request to add the name of the QC vendor firm name to the dropdown list.

Check box for *Verify this response.*

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name	
Head of Pre-Funding Quality Control	Kathy Smith	
Head of Post-Closing Quality Control	Kathy Smith	

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select **None**.

Vendor Type	Vendor Name	Edit
Pre-Funding Quality Control Vendor	Other - Contact fanniemae_alignwithqc@fanniemae.com to request addition of a QC vendor	
Post-Closing Quality Control Vendor	None - 100% QC performed internally	

Live Link:

[Fannie Mae – Align with QC](#)

☒ Verify this response



15. Lender contracts with third-party QC service providers

Additional information required if a QC vendor firm name is selected from the Post-Closing Quality Control Vendor column

Third-Party QC Vendor Oversight automatically activates when at least 1 QC vendor firm name is selected for Post-Closing Quality Control Vendor.

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name
Head of Pre-Funding Quality Control	Kathy Smith
Head of Post-Closing Quality Control	Kathy Smith

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select None.

Pre-Funding Quality Control Vendor

Post-Closing Quality Control Vendor

None - 100% QC performed internally

Accenture

N/A

M&M Consulting

N/A

Xactus

Please enter the name of the individual from the lender's Quality Control business area responsible for performing the monthly 10% oversight review to validate the accuracy and completeness of QC vendor's work. Note: Only one contact can be added for this role.

Third-Party QC Vendor Oversight

+ Existing Contact

New Contact

Cancel

Save



16. Lender contracts with third-party QC service providers

Complete the section named Third-Party QC Vendor Oversight if a QC vendor firm name is selected from the Post-Closing Quality Control Vendor column

Do not create duplicate contacts.

Input the name of QC Manager who oversees the actual day-to-day administration of the post-closing QC vendor oversight process at the operational level by using the option for either *Existing Contact* or *New Contact* & click *Save*.

Contractors / Third Parties

Third Party Originators

You have answered 5 out of 46 Sections

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name
Head of Pre-Funding Quality Control	Kathy Smith
Head of Post-Closing Quality Control	Kathy Smith

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select None.

Pre-Funding Quality Control Vendor

None - 100% QC performed internally

N/A

N/A

Post-Closing Quality Control Vendor

Accenture

M&M Consulting

Xactus

Please enter the name of the individual from the lender's Quality Control business area responsible for performing the monthly 10% oversight review to validate the accuracy and completeness of QC vendor's work. Note: Only one contact can be added for this role.

Third-Party QC Vendor Oversight

+ Existing Contact

+ New Contact

NAME	TITLE	EMAIL	ASSIGN
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Cancel

Save



17. Lender contracts with third-party QC service providers

Validate the accuracy of all input for Quality Control

Check box for
Verify this response.

Mortgage Operations

Quality Control

Roles

These contacts can be updated in the Roles in Your Organization section.

Role	Name	
Head of Pre-Funding Quality Control	Kathy Smith	
Head of Post-Closing Quality Control	Kathy Smith	

Vendors

Please select the names of your Quality Control vendors. If your firm does not outsource to a third-party vendor, please select **None**.

Vendor Type	Vendor Name	Edit
Pre-Funding Quality Control Vendor	None - 100% QC performed internally	
Post-Closing Quality Control Vendor	Accenture	
Post-Closing Quality Control Vendor	M&M Consulting	
Post-Closing Quality Control Vendor	Xactus	

Vendor Type	Name	Edit
Third-Party QC Vendor Oversight	Kathy Smith	

This contact has been updated in the [Contact Verification](#) section. Select the link to see and verify the contact information is correct.

☒ Verify this response

