



Uniform Closing Dataset Quick Guide Non-Seller Access to the UCD Collection Solution

Updated June 13, 2017

Purpose of the document:

The Uniform Closing Dataset (UCD) collection solution offers our customers and non-seller correspondent lenders flexible options to submit and receive feedback on the UCD file at multiple points in their business process, enabling them to take advantage of data quality and eligibility checks prior to loan delivery. This document was created to assist Fannie Mae **non-sellers** obtain access to the UCD collection solution and complete the registration process.

Customers will have two options to deliver and receive feedback on their UCD files:

- Direct integration with Fannie Mae's new business-to-business integration platform, enabling UCD file submission directly from the lender's system.
- Web-based user interface allowing quick import of UCD files and receipt of feedback messages; available from FannieMae.com or via a link within Loan Delivery.

There are two roles for UCD:

- **UCD_SUBMIT:** Provides the capability to upload UCD files, search UCD files, and transfer a submitted UCD file to another party. Fannie Mae Sellers have access to the UCD_SUBMIT role using Loan Delivery credentials.
- **UCD_ADMIN:** Provides the capability to establish and manage relationships between correspondents and aggregators who will share UCD data.

NOTE: The UCD_ADMIN role should only be provisioned to limited number of users. These are specific users in your organization who have the ability to initiate, approve, and view established relationships between a Correspondent and their Aggregator. These users should also request the UCD_SUBMIT role.

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Select one of the links below to be directed to your specific registration setup based on your Fannie Mae user type.

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2. [Existing Fannie Mae Non-Sellers – with access UCDP Only today](#)
3. [New Fannie Mae Non-Sellers – with no access to UCDP/CU today](#)
4. [Grant Access to UCD Application in Technology Manager](#)



1. Existing Fannie Mae Non-Sellers – UCDP/CU

Fannie Mae non-sellers with existing Uniform Collateral Data Portal® (UCDP®) **and** Collateral Underwriter® (CU™) credentials may obtain access to the UCD solution.

Step 1 – Register for UCD

Your Technology Manager Corporate Administrator must go into Technology Manager: Manage Applications under Available Applications and agree to the Terms & Conditions for the usage of the UCD solution. Once this is complete, UCD will be available as an “Active Application Managed” technology solution. Administrators will then be able grant the UCD solution to specific user profiles as needed.

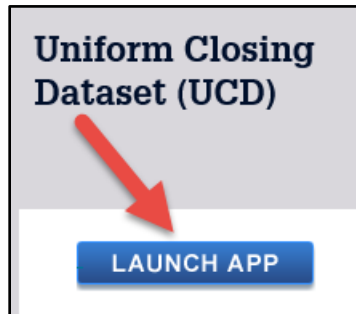
1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select [Technology Manager: Registration & Account Management](#) under the Technology Applications & Tools heading
5. Click **LAUNCH APP** and Login
6. Complete the steps to add the UCD solution. [See Section 4 below for detailed instructions](#)



NOTE: *Technology Manager Corporate Administrator and User Administrators are able to set up and manage user profiles and access to Fannie Mae technology applications. Administrators can grant and remove access to UCD for any users, as needed. Supporting documentation and job aids can be found on the [Technology Manager page](#).*

Access the UCD Collection Solution from FannieMae.com

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select the **Uniform Closing Dataset (UCD)** link under UMDP Data Requirements section. The **UCD** home page will appear. Hint: You may want to bookmark this page in your web browser.
5. Click **LAUNCH APP**. A new browser will open displaying the **UCD Login** page.



1. Enter your Fannie Mae User Name and Password, and click Login

LOG IN

User Name:

Password:

[Need Help With Your User ID or Password?](#)

***Please Do Not Bookmark this page**

2. The **UCD solution** home page will appear

 **Fannie Mae** [Help](#) [Log Out](#)

Upload Search

Please select a UCD file

© 2016 Fannie Mae. Logged in as:



2. Existing Fannie Mae Non-Sellers – UCDP Only

Fannie Mae non-sellers with existing Uniform Collateral Data Portal® (UCDP®) **only** credentials may obtain access to the UCD solution. Before you can register for UCD, you will need to register for Collateral Underwriter® (CU™). We encourage you to register for CU by completing steps 1 and 2 below at your earliest convenience.

Step 1 – Request your password:

Before you can login to the UCD solution, you must have your original Fannie Mae Lender Admin user name and password available.

To retrieve your Fannie Mae user name/password, follow these steps:

1. Call the Technology Support Center (800-2FANNIE or 800-232-6643)
2. Follow the prompts for Single Family Technology Support.

Request a password reset

Once you have received your original Fannie Mae Lender Admin user credentials, follow the steps below to register for Collateral Underwriter.

Step 2 – Register for Collateral Underwriter:

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Originating & Underwriting** tab
4. Select [Collateral Underwriter](#) under the Technology Applications & Tools heading
5. Under Registration & Account Management, open the **CU Non-Seller Implementation Guide**
6. Refer to **Step 2 – Complete Contracting, Registration, and CU User Setup** section of this document
7. Once the contract and registration process are complete, you're UCDP **Lender Administrator** – who is now also setup as a Technology Manager **Corporate Administrator** -- can set up and manage CU application user credentials.

Step 3 – Register for the UCD collection solution

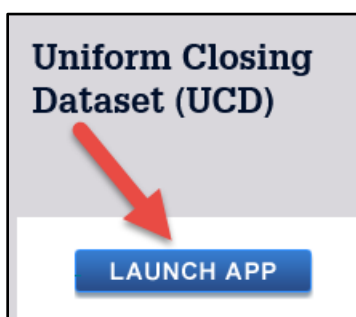
Once the UCDP/CU registration process is completed successfully, your Technology Manager Corporate Administrator must go into Technology Manager: Manage Applications under Available Applications and agree to the Terms & Conditions for the usage for UCD solution. Once this is complete, UCD will be available as an



“Active Application Managed” technology solution. Administrators will then be able grant the UCD solution to specific user profiles as needed. [See Section 4 below for detailed instructions.](#)

Access the UCD Collection Solution from FannieMae.com

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Delivering** tab
4. Select the **Uniform Closing Dataset (UCD)** link under UMDP Data Requirements section. The **UCD** home page will appear. Hint: You may want to bookmark this page in your web browser.
5. Click **LAUNCH APP**. A new browser will open displaying the **UCD Login** page.



1. Enter your Fannie Mae User Name and Password, and click Login

The image shows a screenshot of the 'LOG IN' page. It features a form with two input fields: 'User Name:' and 'Password:'. Below the fields is a green 'LOGIN' button and a 'Clear' link. At the bottom, there is a link that says 'Need Help With Your User ID or Password?'.

***Please Do Not Bookmark this page**

2. The **UCD solution** home page will appear

The image shows a screenshot of the UCD solution home page. The page has a dark blue header with the Fannie Mae logo and 'Fannie Mae' text. In the top right corner, there are links for 'Help' and 'Log Out'. Below the header, there is a navigation bar with 'Upload' and 'Search' buttons. The main content area contains the text 'Please select a UCD file' and a 'Choose File...' button. Below this, there are 'Upload', 'Clear', and 'Refresh' buttons. At the bottom, there is a footer with '© 2016 Fannie Mae.' and a 'Logged in as:' field.



3. New Fannie Mae Non-Sellers

New Fannie Mae non-sellers must follow the Uniform Collateral Data Portal® (UCDP®) / Collateral Underwriter® (CU™) registration process for non-seller correspondents before they can access UCD solution. Register for UCDP and Collateral Underwriter by completing steps 1 and 2 below.

Step 1 – Register for UCDP Access:

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Originating & Underwriting** tab
4. Select [UCDP](#) under the Technology Applications & Tools heading
5. Under Technology Requirements & Registration, open the **How to Register for UCDP** document.
6. Refer to the **Correspondents (Non-Seller/Service) that do not have an existing Fannie Mae Seller/Service Number** section of the document.

NOTE: *It takes between 7-10 business days to be issued registration for UCDP.*

Step 2 – Register for Collateral Underwriter Access:

Once you have received your UCDP credentials, follow the steps to register for Collateral Underwriter.

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**
3. Click the **Originating & Underwriting** tab
4. Select [Collateral Underwriter](#) under the Technology Applications & Tools heading
5. Under Registration & Account Management, open the **CU Non-Seller Implementation Guide**
6. Refer to **Step 2 – Complete Contracting, Registration, and CU User Setup** section of this document
7. Once the contract and registration process are complete, your UCDP Lender Administrator – who is now also setup as a Technology Manager Corporate Administrator -- can set up and manage CU application user credentials.

Step 3 – Register for UCD Access

Your Technology Manager Corporate Administrator must go into Technology Manager: Manage Applications under Available Applications and agree to the Terms & Conditions for the usage of the UCD solution. Once this is complete, UCD will be available as an “Active Application Managed” technology solution. Administrators will then be able grant the UCD solution to specific user profiles as needed.

1. On the FannieMae.com Home page, click **Funding the Market**
2. Under Business Partners Click **Single-Family Business**



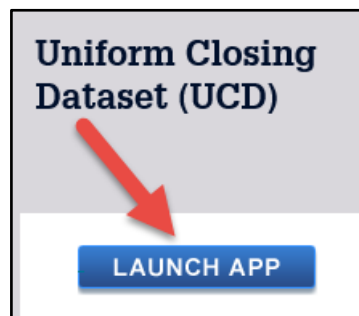
3. Click the **Delivering** tab
4. Select [Technology Manager: Registration & Account Management](#) under the Technology Applications & Tools heading
5. Click **LAUNCH APP** and Login
6. Complete the steps to add the UCD solution. [See Section 4 below for detailed instructions.](#)



NOTE: *Technology Manager Corporate Administrator and User Administrators are able to set up and manage user profiles and access to Fannie Mae technology applications. Administrators can grant and remove access to UCD for any users, as needed. Supporting documentation and job aids can be found on the [Technology Manager page](#).*

Access the UCD Collection Solution from FannieMae.com

1. On the FannieMae.com Home page, click **Funding the Market**
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5. Click **LAUNCH APP**. A new browser will open displaying the **UCD Login** page.



6. Enter your Fannie Mae User Name and Password, and click Login.



LOG IN

User Name:

Password:

[Need Help With Your User ID or Password?](#)

***Please Do Not Bookmark this page**

7. The **UCD solution** home page will appear.

Fannie Mae [Help](#) [Log Out](#)

Please select a UCD file

© 2016 Fannie Mae. Logged in as:



4. Grant Access to UCD Application in Technology Manager

1. On the Technology Manager Home Page, click the **Manage Users** link.

Corporate Administrator Home Page

My Company
Subscriber ID - Name:
c010ub - GEM SAVINGS ASSOCIATION - 16101

Applications	Users	Company
<i>I Would Like To...</i> Manage Applications Manage Data Folders	<i>I Would Like To...</i> Update My Info <hr/> Create New User Manage Users Manage User Groups	<i>I Would Like To...</i> Edit Company Configuration Manage Lender/Broker Relationships Generate Reports

User Administrator Home Page

My Company
Subscriber ID - Name:
c010ub - GEM SAVINGS ASSOCIATION - 16101

I Would Like To...

- [Update My Info](#)
- [Create New User](#)
- [Manage Users](#)
- [Generate Reports](#)

2. The Manage Users screen appears. In the Search field, enter the desired search criteria and search value, then click **Search**.



NOTE: The screens to create a new user are the same for both CA and UA profiles.

Manage Users

Search

Choose one of the following:
 Active Deactivated Both

Search by:
Last Name [v] [text box]

Search [button] Clear Search [button]

Active Users [panel highlighted]

Deactivated Users [panel]

[Create New User ...](#)

Profile Information [panel]

Granted Applications [panel]

Available Applications I Manage [panel]

Available Applications I Don't Manage [panel]

Deactivated Applications [panel]

3. Click the **Active Users** panel where the user's record was found, then select the **user record**.

I Would Like To...

Manage Users

Search (by 'Last Name') [panel]

Active Users (4 records found) [panel highlighted]

First Name	Last Name	User ID	Phone	User Group ID
Bertie	Test	w1283bxt	(703) 833-1111	w1283a
Billy	Test	w1283bnt	(703) 833-1111	w1283a
Jeremy	Test	w1283jnt	(703) 833-1111	w1283a
Lindsay	Test	w1283lnt	(703) 833-1111	w1283a

Deactivated Users [panel]

[Create New User ...](#)

Profile Information [panel]

Granted Applications (0 records found) [panel]

Application Name [text box]

Available Applications I Manage (3 records found) [panel]

Available Applications I Don't Manage (5 records found) [panel]

Deactivated Applications (0 records found) [panel]

4. Click the **Available Applications I Manage** panel, then click the **UCD** application you want to assign to the user.



Fannie Mae Technology Manager

Applications Users Company

Manage Users

This symbol, if displayed next to a user record, indicates that the specific user ID is utilized as a System ID or Application ID. Ability to manage this user ID access may be limited.

This application is suspended or no longer meets required business rules. Click the application for more information.

This symbol, if displayed next to a user record, indicates that the specific user is locked. As an administrator, you can unlock the user by resetting their password.

Search (by 'All Records')

Active Users (958 records found)

First Name	Last Name	User ID	Phone	User Group ID
Jason	Brown	d336kxb	(215) 575-1824	d336ka
Jason	Brown	d336k2b	(215) 575-1824	d336ka
Jason	Brown	d336k1b	(215) 575-1824	d336ka
Jason	Brown	i0610rb	(215) 575-1824	i0610e
Jason	Brown	d339u1rb	(215) 575-1824	d339ua
Jason	Brown	d336k1rb	(215) 575-1824	d336ka
Jason	Gleason	d336k1ng	(215) 575-1426	d336ka

Deactivated Users

Create New User ...

Profile Information

Granted Applications (3 records found)

Available Applications I Manage (44 records found)

Application Name: UCD

Available Applications I Don't Manage (6 records found)

Deactivated Applications (0 records found)

5. The **Set Up User Access** screen appears.

Fannie Mae Technology Manager

Set Up User Access

Subscriber ID - Name: d336ka - FANNIE MAE - 27233

User ID: d336k2b Title: First Name: Jason MI: R Last Name: Brown

Application Name: UCD

Roles

This application requires 1 role(s). This requirement must be met in order to click Submit.

Available Roles

- UCD_SUBMIT
- UCD_ADMIN

Assigned Roles

No data

Add >
Add All >>
< Remove
Undo All Changes



6. In the Roles section, select the **role(s) you want to assign** to the user, then click **Add**.

UCD_SUBMIT: All users should have UCD_SUBMIT access.

UCD_ADMIN: role should only be provisioned to a limited number of users. These are specific users in your organization who have the ability to initiate, approve, and view established relationships between correspondents and aggregators. These users should also request the **UCD_SUBMIT** role.

Fannie Mae Technology Manager | Fannie Mae | Logout

Set Up User Access

Subscriber ID - Name:
[d330ka - FANNIE MAE - 27233]

User ID: [d330ka2b] **Title:** [] **First Name:** [Mason] **MI:** [R] **Last Name:** [Brown]

Application Name:
[UCD]

Roles

Available Roles

UCD_ADMIN
UCD_SUBMIT

Assigned Roles

No data

**This application requires 1 role(s).
This requirement must be met in order to click Submit.**

Add >
Add All >>
< **Remove**
Undo All Changes



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

Use Ctrl - mouse click to multi-select

1 of 1

Use Ctrl - mouse click to multi-select

1 of 1

Select one item at a time, multi-select is not allowed.

Select one item at a time, multi-select is not allowed.

Data Folders

Available Data Folders

Seller Servicer Nu	Name
161013005	GEM SAVINGS ASSOCIATION
161010006	GEM SAVINGS ASSOCIATION

Assigned Data Folders

Seller Servicer Nu	Name
No data	

Minimum number of data folders required: 1.
This requirement must be met in order to click Submit.

Submit Cancel

8. Click **Submit**.
9. An Alert box appears. Click **Confirm** to save your changes.

ALERT

Do you want to update this user's access?

Confirm Cancel



Additional Information:

Application	Bookmark the Page	Support options
UCD	www.fanniemae.com/singlefamily/uniform-closing-dataset	UCD@fanniemae.com or Fannie Mae Representative
Loan Delivery	www.fanniemae.com/singlefamily/loan-delivery	800-2FANNIE (800-232-6643)
Collateral Underwriter	www.fanniemae.com/singlefamily/collateral-underwriter	800-2FANNIE (800-232-6643)
UCDP	www.fanniemae.com/singlefamily/uniform-collateral-data-portal	800-2FANNIE (800-232-6643) UCDP_setup@fanniemae.com
Technology Manager	www.fanniemae.com/singlefamily/technology-manager	800-2FANNIE (800-232-6643) technology_manager_request@fanniemae.com