UCDP Appraisal Sharing Job Aid for Aggregators

Aggregator Lender Admin: Follow Steps 1 and 2 to perform the required one-time aggregator set-up and manage user role set-up for your organization within the Uniform Collateral Data Portal® (UCDP®).

Aggregator (Individual User): Refer to Step 3 to retrieve correspondent-shared appraisals.

Lender Role	Activity
Aggregator Lender Admin	**Step 1: Perform One-time Aggregator Set-up** The **Aggregator Profile** set-up is the prerequisite step to begin receiving correspondent appraisals shared with your organization. As the **Aggregator Lender Admin**, you are responsible for creating and managing the aggregator profile for your organization within the UCDP web portal. From the **UCDP Home page**, click the **Account Administration** tab and select **User and Business Unit Administration**. Select your **UCDP Business Unit**, locate the **Aggregator Set up** section and fill out the required fields (**Aggregator Name, City, State, FNM S/SN (5-digit), FRE SSN**). You will be assigned a randomly generated Aggregator ID to share with your correspondent lenders once you have completed these steps. Refer to *Uniform Collateral Data Portal Reference Series for the Lender Admin: 5 - Managing Aggregator Profile* for step-by-step instructions. **Notes:** ■ Aggregators must access the UCDP web portal to set up the aggregator profile. ■ S/SN drop-down lists: Please select the value based on the S/SN that you intend to use for your UCDP appraisal submissions. Please note: the FNM S/SN drop down will reflect only the first 5-digits of the S/SN. ■ If you have multiple Seller/Servicer Numbers (S/SNs) listed and have questions on which one to use, contact your Fannie Mae customer account team or Freddie Mac representative. ■ Be sure to communicate the newly created Aggregator Name and Aggregator ID to your correspondent lenders so they can begin sharing appraisals with your organization.

Step 2: Review and Assign the UCDP role
In order to retrieve correspondent-shared appraisals, aggregators must have the appropriate UCDP Role. As the **lender admin**, you are responsible for assigning one of the following UCDP roles to your user: ***Lender Admin*** or ***Lender CorrAgg User***.   **Note:**   The *Lender CorrAgg User* has the same privileges as a *Lender User* with the added appraisal sharing functionality.   Refer to *[Uniform Collateral Data Portal Reference Series for the Lender Admin: 3 - Managing Users](#)* for step-by-step instructions on how to assign or change a user's role in UCDP.   To use the **UCDP Direct Integration (DI)** solution, your users must have the *DI Lender* role to successfully execute the appraisal sharing related DI services/calls.

Lender Role	Activity
Aggregator (Individual User)	**Step 3: Retrieve Correspondent-shared Appraisals** **UCDP Web Solution:** From the Home page, navigate to the Share Appraisal tab and select the Retrieve Appraisals from the drop-down to generate the Retrieve Shared Appraisals page. Enter the parameters to search for correspondent-shared appraisals and submit. Once the search results return, you may review the appraisal's status, findings, Submission Summary Report (SSR), and PDF as needed. Refer to *[Uniform Collateral Data Portal Appraisal Sharing User Guide](#)* for step-by-step instructions on retrieving correspondent-shared appraisals. **UCDP DI Solution:** ▪ Execute the optional *GetDesignations* DI call to retrieve a list of Doc File IDs that have been designated to you within the prescribed date range. ▪ Execute the *GetFindings, GetFindingsWait*, and *GetReports* DI calls to access the correspondent-shared appraisal's status, findings, and SSR.