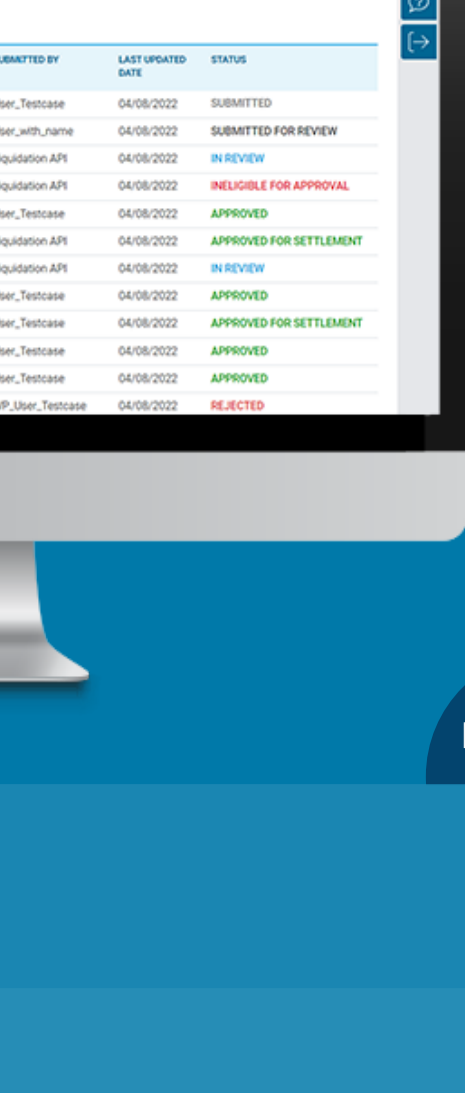


# RESOLVE® Onboarding Checklist

## THE BASICS



### DO THESE FIRST

Get familiar with Resolve and key resources before you pick an onboarding checklist.



#### MY PROGRESS

Learn about Resolve, capabilities, and resources.  
→ [Visit the Resolve web page](#)

#### TIMING

Recommend doing now

#### STEP

Identify staff such as loss mitigation specialists, Access Manager administrators, project managers etc.  
→ [Share the onboarding checklist](#)

Recommend doing now

Identify your organization's loss mitigation policies and procedures as it relates to the available user interface features and recent announcements.  
→ [Review release summary](#)

Check quarterly

Assess and plan for change management activities for upcoming capabilities.  
→ [View Product Timeline](#)

Check quarterly

## YOUR OPTIONS



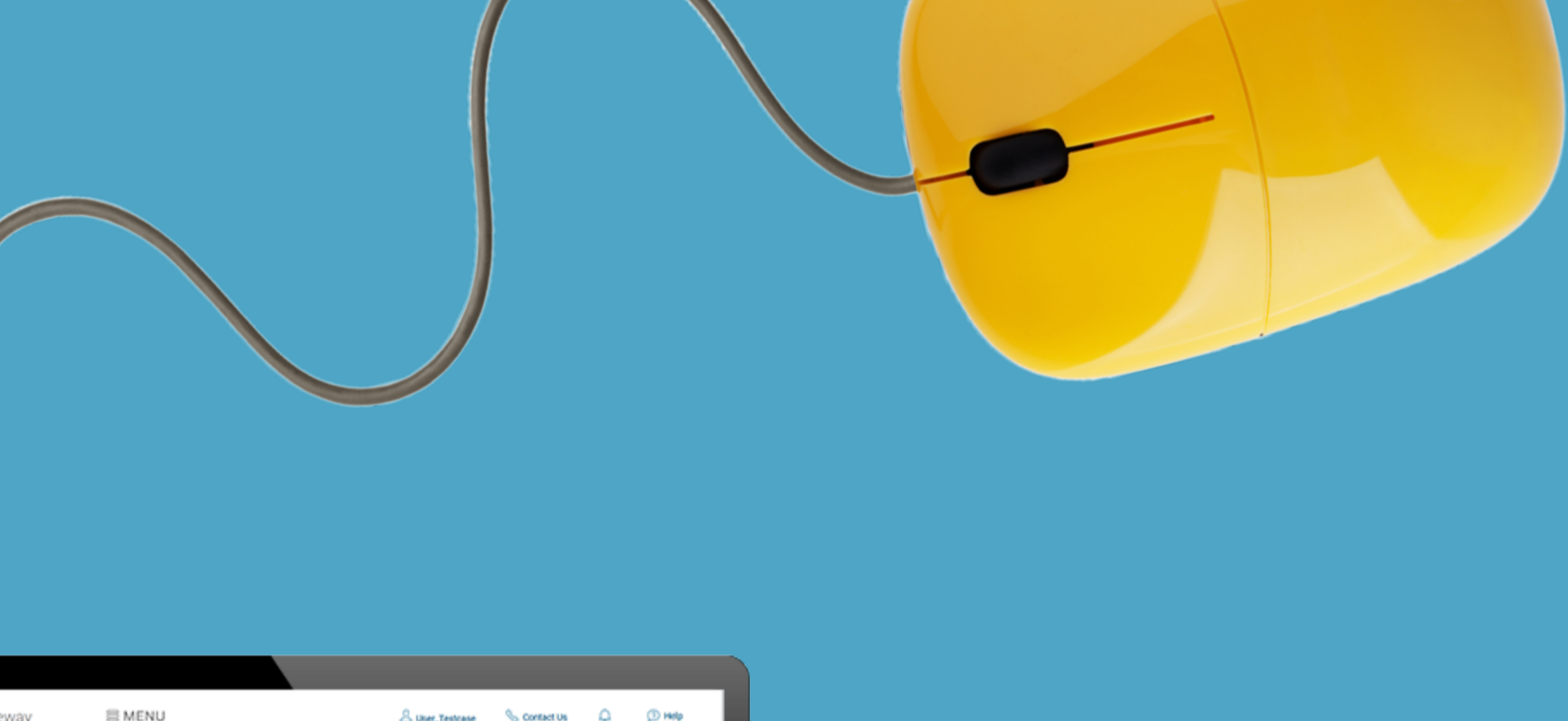
Hover over an image to learn more about each option

### CHOOSE AN ONBOARDING CHECKLIST

#### USER INTERFACE

#### INTEGRATING VIA TECHNOLOGY PROVIDER

#### DEVELOPING APIs FOR A PROPRIETARY SYSTEM



## USER INTERFACE

#### MY PROGRESS

### TAKE TRAINING

Learn the tool features and capabilities.

Access step-by-step instructions on how to use Resolve.  
→ [Resolve Online help](#)

As needed

Create an account on Freddie Mac Learning, with your Seller/Servicer number to register for training.  
→ [Watch video](#)

Recommend doing now (if not already set up)

Visit the Resolve training web page to register for a webinar, view online help, watch tutorials and access reference documents as they become available.  
→ [Browse Training Options](#)

Check quarterly

### SET UP AND ACCESS TOOL

Successfully set up your organization and users and start using the tool.

Set up your organization in Access Manager to provide user access and profiles. An authorized contact at your organization can begin the process by submitting the Get Started form.

As soon as possible for Servicers not currently set up in Access Manager

Once the form is received, a Freddie Mac representative will contact you within two business days to assist you in completing the Freddie Mac Access Manager Registration Form and other steps for managing user access.  
→ [Enroll in Access Manager](#)

Provide user access to Resolve. Use the online help, 'User Roles' section to determine appropriate access type.  
**Servicer is on Access Manager:** Access Manager administrators should set up new users, modify roles and/or assign any additional administrators in Resolve.  
→ [Log into Access Manager](#)  
**Servicer is not on Access Manager:** Complete the below form to manage user access.  
→ [Servicing Gateway Access Request Form](#)

As needed

Log into Servicing Gateway and open Resolve to validate access for available capabilities. Contact your Access Manager administrator for assistance.  
→ [Log into Servicing Gateway](#)

As needed

Confirm you can complete loss mitigation tasks as it relates to the available capabilities.

As needed

With each available workout for complete, follow your procedures for resolving workout processing and do not use Workout Prospector.  
For all other workouts, continue to use Workout Prospector until new capabilities are released in Resolve.

With each workout request



## INTEGRATING VIA TECHNOLOGY PROVIDER



#### MY PROGRESS

### PREP

Learn about the Resolve API suite and how to efficiently integrate the Resolve platform in cooperation with your servicing technology provider.

Learn about Resolve APIs, the value, how they work, use cases and more.  
→ [Visit Resolve API web page](#)

Recommend doing now

Understand current and future API capabilities.  
→ [View Product Timeline](#)

Check quarterly

#### STEP

### ASSESS INTEGRATION

Understand the scope and engagement model for working with your technology provider.

Learn about the API engagement model, timing and more.  
→ [Download Resolve API Playbook](#)

Recommend doing now

Contact your technology provider to discuss Resolve API integration.

Recommend doing now

#### TIMING

### ENGAGE IN INTEGRATION EFFORTS

If your technology provider is adopting Resolve APIs, follow this guidance to participate in integration.

Your technology provider will submit API requests from their system on your behalf; this requires a Related Third-Party Agreement (RTP). The Servicer and technology provider will sign and return to Freddie Mac.

Recommend doing now

Confirm all Seller/Servicer numbers which will be used by your technology provider.

Recommend doing now

Coordinate with your technology provider to develop a timeline for testing and implementation activities.

Recommend doing now

Participate in loan testing activities in your technology provider's user acceptance testing (UAT) environment.

Per your adoption schedule

Complete configuration activities through your technology provider's system.

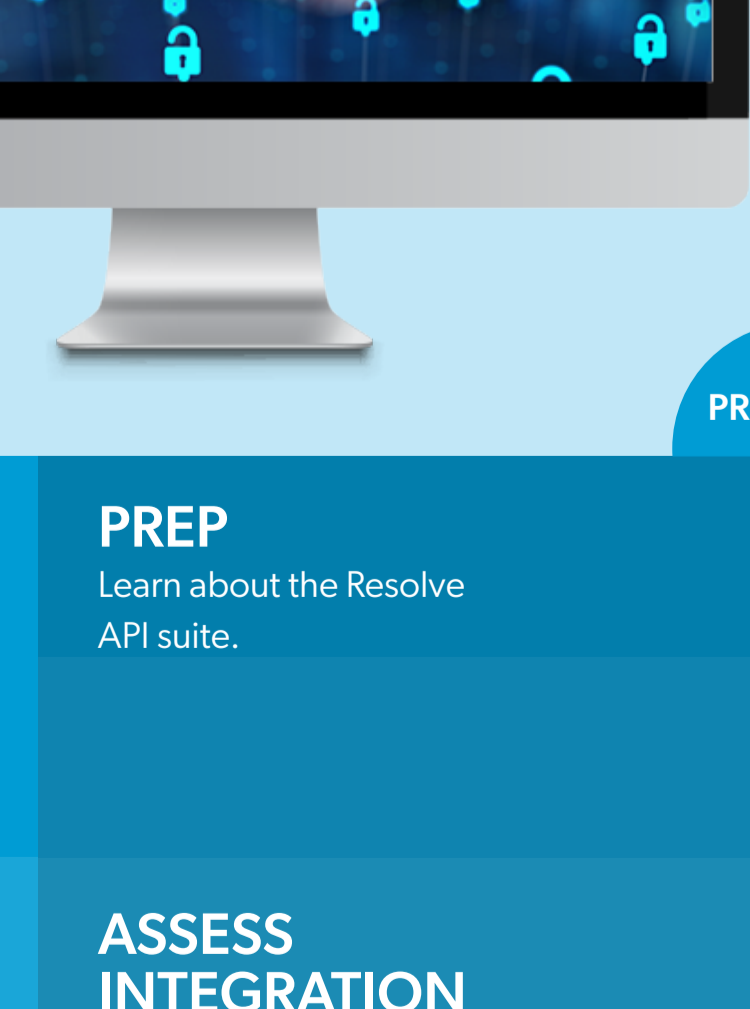
Per your adoption schedule

Complete a term of business (TOB) with Freddie Mac prior to integration go-live.

Per your adoption schedule



## DEVELOPING APIs FOR A PROPRIETARY SYSTEM



#### MY PROGRESS

### PREP

Learn about the Resolve API suite.

Learn about Resolve APIs, the value, how they work, use cases and more.  
→ [Visit Resolve API web page](#)

Recommend doing now

Understand current and future API capabilities.  
→ [View Product Timeline](#)

Check quarterly

#### STEP

### ASSESS INTEGRATION

Understand the scope and engagement model.

Learn about the API engagement model, timing and more.  
→ [Download Resolve API Playbook](#)

Recommend doing now

Learn about the [Developer Portal](#)—a key tool part of the integration process, and how your organization might leverage it to build Resolve APIs.  
→ [Watch a demo](#)

Recommend doing now

Indicate your interest to integrate via Resolve APIs in one of two ways:  
• Contact your servicing account representative  
• [Request consultation](#)

Recommend doing now

Request users to the Developer Portal for business users (i.e., analysts, product managers) and developers to browse APIs and documentation.  
→ [Follow the Get Started steps](#)

You can do now or wait until after your consultation

Understand the mechanics of Resolve APIs. In the Developer Portal, go to the 'API Details' section of each API to review the following API Guides:  
• Workout Options API Guide  
• Retention API Guide  
• Liquidation API Guide  
• Valuation and Pricing API Guide

Once you receive Developer Portal credentials

