Condo Project Advisor® Access

To access Condo Project Advisor®, your organization must be provisioned through Freddie Mac Access Manager. Access Manager is a self-service system that enables Freddie Mac Seller/Servicers to create, manage and provide their users access to certain Freddie Mac Single-Family sourcing and servicing tools and applications. With Access Manager, you can also run real-time reports on user access and review access privileges on a periodic basis to recertify approved users.

This job aid provides information on the user roles and how to obtain organizational access to use the Condo Project Advisor Project Assessment Request (PAR) and the Project Waiver Request (PWR) capabilities.

> **Note:** If you are using Access Manager for the first time, refer to Exhibit 1.

Existing Condo Project Advisor Users

No action is required!

If you're already using Condo Project Advisor PWR to manage your project eligibility waiver requests, effective October 24, 2022, you will automatically have access to submit PARs

New Condo Project Advisor Users

Current Access Manager Users

If you are already using Access Manager for other tools, your executive administrator will need to use the Modify Administrator Access authorization workflow to update the existing company administrator's access authorization to allow provisioning for Condo Project Advisor. Once that is completed, they can use the New Administrator Account workflow to edit/add users to allow use of Condo Project Advisor.

> **Note:** If you are using Access Manager for the first time, refer to Exhibit 1.

The following steps must be completed to access Condo Project Advisor through the Freddie Mac Loan Advisor® portal.

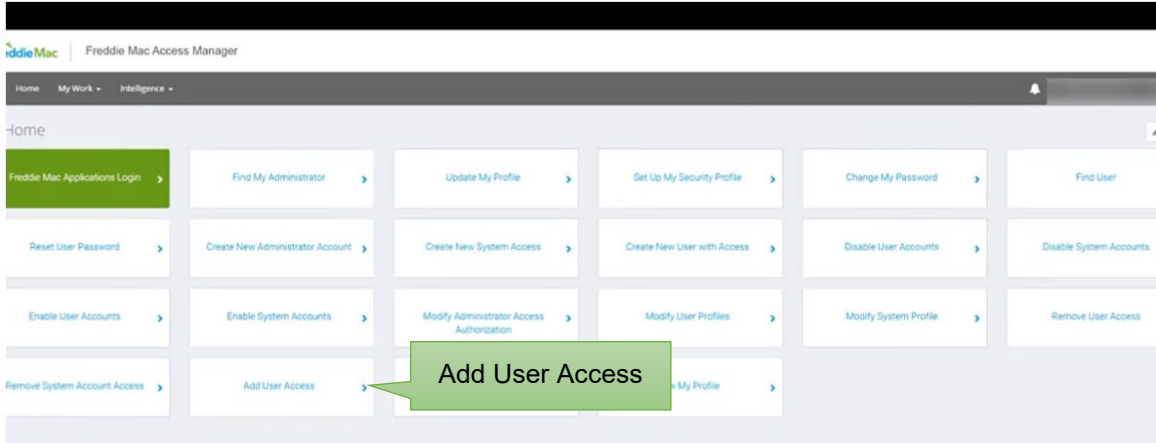| Step	Action
1	**Login** to Access Manager as an Executive Administrator/Primary Elevated Administrator. If you don't know who the Executive Administrator is within your organization, use the *Find My Administrator workflow* in the [Access Manager Online Help](#).
2	**Select** the Modify Administrator Access Authorization option and add the "**Project Underwriter**" role to Primary and Secondary Administrators. Executive or Primary Elevated Administrators can provide administrator access authorizations to Condo Project Advisor from here **Project Underwriter Role:** This role can submit PARs, review the Project Assessment Results page, download Project Assessment Results PDF Feedback Certificate, submit PWRs, upload PWR documentation, and monitor PWR pipeline status.

Step	Action
3	**Have the Executive Administrator grant access to the Primary Administrator(s).** From the Access Manager page, the Executive Administrator must click the menu icon in the upper-left corner and select **Modify Admin Access Authorization** to add Condo Project Advisor as an application for the Primary Administrator(s). For step-by-step instructions, refer to the *Modify Admin Access Authorization workflow* within the [Access Manager Online Help](#). **Modify Administrator Access Authorization** **Instructions** A user's Access Authorization is a customized set of applications, roles, and legacy number associations to which they have permission to provision for a user. **Application** Condo Project Advisor-CPA A summary of the selected access. **Selected Access *** CANCEL BACK NEXT **Log in to Access Manager and begin granting access to Condo Project Advisor.** Once you have access to Condo Project Advisor, you may begin granting access to other authorized users. Existing Access Manager users will receive an email, with the subject line *Freddie Mac System Access Notification for [name],* indicating the tool(s) and role(s) for which they were granted access.

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Step	Action
4	**Select Add User Access:** Add User Access - Select Application: **Condo Project Advisor** - Select Role: **Project Underwriter** - Click, **Next**

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Step	Action
(cont'd)	The **Role Description** displays. Add User Access **Instructions** Please specify the applications, roles, and Counterparty Number associations to which the user will have permission to access within Freddie Mac. Selected User:CPA User **Application Name** Condo Project Advisor-CPA **Role** Project Underwriter **Role Description** This role can submit Project Assessment Request, review the Project Assessment Results pipeline page, download Project Assessment Results PDF Feedback Certificate, submit Project Waiver Requests, upload Project Waiver Request documentation, monitor Project Waiver Request pipeline status. **Counterparty Numbers**
5	**Select the Counterparty Numbers:** **Counterparty Numbers** 186925 ☐ Select All Counterparty Numbers Click to associate all Counterparty Numbers to the selected Role. ☐ Remove All Counterparty Numbers Click to disassociate all Counterparty Numbers from the selected Role. ☐ Add to Selected Access

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Step	Action
6	**Choose the Selected Access** and **Next:** A summary of the selected access Selected Access * CoPA-Project Underwriter-186925 CANCEL BACK NEXT
7	**Confirm and Submit Request.** Confirm Request **Instructions** Confirm the request for the creation of the following user **Counterparty** OIM Test Bank. chg **User Title** **First Name** CPA **Middle Name** **Last Name** User **Email** **Phone Number** CPA@User.com 555-555-5555 **Cell Phone** **Fax Number** **Pin** 8602 **Application** **Role** **Counterparty Number(s)** Condo Project Advisor-CPA Project Underwriter 186925 CANCEL BACK SUBMIT

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Exhibit 1: New Access Manager Users

If you're **not** already using Access Manager to manage user access to use our tools and applications, the following steps must be completed:

Step	Action
1	**Open the [Freddie Mac Access Manager Get Started page](#).** Complete the form in its entirety and click the *Get Started* button at the bottom of the page. This submits your access request and a representative will contact you within two business days. *Note:* If needed, you can follow up by contacting the Customer Support Contact Center (800-FREDDIE).
2	**Identify your organization's Administrators and the tools for which they need access.** You must identify and provide contact information for: ▪ An Executive Administrator with a Primary role and one Primary Elevated or Primary Administrator The following table outlines responsibilities of each role. *(see role table below)* You must also determine who will be **responsible for certifying access for authorized users and the frequency.** Contact your Freddie Mac representative with any questions about identifying administrators and integrating Access Manager into your business structure/process.
3	**Complete the setup with a Freddie Mac representative.** Freddie Mac will contact you to complete the registration process. Once your access request has been finalized, two emails will be sent with the subject line *Freddie Mac System Access Notification for [name]* to the Executive Administrator and Primary Elevated or Primary Administrators. The emails confirm that they are set up and provide credential and log-in information. One email will contain the User ID. The other email will contain a temporary password that must be set to a permanent password within 10 days.

Role	*Responsibilities*
Executive Administrator with Primary Administrator capabilities	Identifies two Primary Administrators who have authority to use Access Manager. One Primary Administrator may be the Executive Administrator.
Primary Elevated or Primary Administrator	Acts as a point of accountability for all provisioning access to specific tools within your company or company divisions. This includes the ability to add, modify, or disable authorized user access to specific tools.

Step	Action
	Note: If you don't receive emails from Freddie Mac after two business days, you can follow up by sending an email to CSA_Operations@FreddieMac.com or by contacting the Customer Support Contact Center (800-FREDDIE).
4	**Log in to Access Manager and begin adding other administrators and users.** Once you have access to Access Manager, add any additional administrators (including optional secondary administrators). You may also begin adding users and granting access to Condo Project Advisor. Each added user will receive two emails with the subject line *Freddie Mac System Access Notification for [name].* One email will contain the User ID. The other email will contain a temporary password and the tool(s) and role(s) available. Individual users can reset their single-sign-on password, update their profile, and begin using Condo Project Advisor and other tools they are authorized to use. Users must create a permanent password within 10 days from receiving the email as temporary passwords are only valid for 10 days. To learn about the different workflows for managing user access, and additional resources, refer to the Access Manager webpage.

Resources

To learn more, check out the Access Manager resources available to you:

- Getting Started with Access Manager Overview Videoclip – Provides an overview, hands-on activities, and simulations. (10 mins)
- Access Manager Home Page – Overview, FAQ and links to Tools and Applications.