

Loan Selling Advisor[®]

Training Resources

Loan Selling Advisor[®] is the Freddie Mac all-in-one solution for pricing, contracting, and loan delivery. This document lists various resources available on Freddie Mac Learning that show how to work with Loan Selling Advisor and Freddie Mac. Click on the title to access the resource.

Introduction

Reference Tools

[Selling Mortgages to Freddie Mac Using Loan Selling Advisor](#)

Access a robust menu of Help topics to assist you with navigating Loan Selling Advisor functions and tools. Our step-by-step instructions will aid you with creating and pricing contracts under the Cash, Guarantor and MultiLender executions, create rate sheets, create and price loans, understand the delivery process, settlement and/or funding, exporting data and more. **Updated March 2024**

Tutorials / Videos

[Loan Selling Advisor User Roles](#)

This 8-minute tutorial explains the various user roles available and the process for getting set up with those roles.

[Loan Selling Advisor Overview](#)

This 10-minute tutorial provides an overview of Loan Selling Advisor, including information on logging in, navigation, user profiles, user roles and various resources.

[Getting Started with Loan Selling Advisor Online Help](#)

In this 3-minute video, learn how to navigate through Loan Selling Advisor Help.

Cash Pricing and Contracting

Reference Tools

[Loan Selling Advisor Cash Selling and Delivery Process Flow](#)

Use this interactive process flow to understand the steps for successful cash contract delivery and fulfillment through Loan Selling Advisor.

[Cash Contract Data Field Definitions](#)

Data field definitions and requirements for entering data when creating all cash contracts. Data fields display based on the contract and servicing options selected.

[Sell and Deliver Mortgages with Specified Characteristics to Freddie Mac](#)

Provides instructions and tips on selling and delivering mortgages with specified characteristics to Freddie Mac, using Loan Selling Advisor. **Updated February 2024**

[Deliver ULDD ARM Data Fields](#)

This reference tool reviews mortgage loan data that must be delivered under the requirements of the Uniform Loan Delivery Dataset (ULDD) through Loan Selling Advisor for Adjustable Rate Mortgages (ARMs) sold to Freddie Mac.

[Best Practices for Best Efforts Contracts](#)

Instructions on using the Modify Best Effort Import functionality, the data required to create a loan or contract using "Quick Loan," and other best practices with a Best Efforts commitment.

[SOFR At-a-Glance for Selling and Delivery](#)

This reference tool provides an overview of the Secured Overnight Financing Rate (SOFR) Index and guides you through impacts to Freddie Mac Loan Advisor selling and delivery systems.

Tutorials / Videos

[Cash Rate Sheet Fundamentals](#)

This 15-minute tutorial highlights how to request Freddie Mac Rate Sheets for servicing-released and servicing-retained contracts and understand rate sheet results and options.

[Create Cash Rate Sheet Templates](#)

In this 5-minute videoclip, you'll learn how to create cash rate sheet pricing scenarios and save them as rate sheet templates, and how to modify and manage cash rate sheet templates.

[Purchase Contracts Overview](#)

This 5-minute tutorial contains an overview of Freddie Mac's purchase contracts, contract types and the contract life cycle.

[Mandatory Fixed-Rate Cash Contract Fundamentals](#)

In this 10-minute tutorial, learn about the fundamentals of mandatory, fixed-rate, servicing-retained or Concurrent Transfer of Servicing contracts and how to create them in Loan Selling Advisor. **Updated March 2024**

[Extend a Mandatory Cash Contract](#)

In this 5-minute video, learn how to extend Mandatory, fixed-rate, Cash Contracts directly in Loan Selling Advisor. In the event the contract amount specified in a Mandatory Cash Contract will not be fulfilled on or prior to the contract expiration date; you may extend the contract at any time on or prior to the contract expiration date.

Updated January 2024

[Pair Off Mandatory Cash Contracts](#)

An 8-minute tutorial defining a cash pair-off, which identifies the cash contract tolerance and options for pair-offs as well as simulates the pair-off process. **Updated January 2024**

[Using Compare for Best Efforts Cash Contracts](#)

In this 2-minute video, learn how to view and compare the fees assessed before you accept the price when initiating an extension or relock for a Best Efforts Cash Contract.

[Adjustable Rate Mortgage \(ARM\) Cash Contracts](#)

In this 20-minute tutorial, you will learn how to create an ARM Cash Contract in Loan Selling Advisor and how to navigate the contract screens and accept the price. **Updated March 2024**

[Import Fixed-Rate Cash Contract](#)

In this 4-minute video, learn how to import fixed-rate contract data from import files.

[Best Efforts Contract Option](#)

This 36-minute tutorial provides a detailed view of the process of taking out and fulfilling a Best Efforts Contract, covering requirements, pricing and creating/modifying a contract.

[Single-Family's Sell for Cash Toolkit](#)

This toolkit contains information to assist you in selling mortgages for Cash to Freddie Mac. It contains links to a variety of resources including job aids, tutorials webpages and tools you will need to successfully sell mortgages through the Cash execution.

Guarantor and MultiLender Swap Pricing and Contracting

Reference Tools

[Single-Family's Sell for Securities Checklist](#)

This checklist will help guide you through the steps required to start selling mortgages to Freddie Mac through the Guarantor and MultiLender Swap executions.

[Sell for Securities: Frequently Asked Questions](#)

These frequently asked questions will assist you when selling mortgages through our Guarantor and MultiLender Swap executions and will help you better understand some of the delivery requirements.

[Loan Selling Advisor Guarantor Selling and Delivery Process Flow](#)

Use this interactive process flow to understand the steps for successful guarantor contract delivery and fulfillment through Loan Selling Advisor.

[BUBD Calculator for Fixed-Rate Guarantor and MultiLender Swap](#)

This calculator is designed to help you calculate buyups, buydowns and accounting net yield amounts for guarantor contracts sold through Loan Selling Advisor.

Tutorials / Videos

[Single-Family's Sell for Securities Roadmap](#)

Use this interactive roadmap to guide you through the process of doing guarantor business with Freddie Mac. From pricing and pooling to contracts, loan delivery and fulfillment, you will understand the steps required for issuance of the security.

[Single-Family's Sell for Securities Toolkit](#)

This toolkit contains information to assist you in selling mortgages for securities to Freddie Mac. It contains links to a variety of resources you will need to successfully sell mortgages through Loan Selling Advisor for Guarantor and MultiLender Swap executions.

[Manually Create or Import Guarantor Contracts](#)

In this 35-minute tutorial, learn how to create Guarantor or MultiLender contracts in Loan Selling Advisor by manually entering or importing data.

[Assign Security Wire Instructions](#)

This 10-minute tutorial describes the process to assign security wire instructions for Guarantor and MultiLender contracts.

[Buyups and Buydowns for Fixed-Rate Guarantor and MultiLender Contracts](#)

This 15-minute tutorial will help you understand buyups and buydowns for fixed-rate mortgages and how to utilize them to pool a wider range of note rates under one coupon. **Updated January 2024**

[Guarantor Rate Sheets](#)

This 5-minute tutorial will help you understand Guarantor Rate Sheets, rate sheet components and how to generate and export them.

[Guarantor Security Wire Instructions](#)

This 7-minute tutorial demonstrates how to create and manage security wire instructions for Guarantor Contracts. You will also learn about the required user roles for these tasks.

[Purchase Contracts Overview](#)

This 5-minute tutorial contains an overview of Freddie Mac's purchase contracts, contract types and the contract life cycle.

[Servicing Options for Guarantor and MultiLender Contracts](#)

This 3-minute video will help you understand servicing options for Guarantor and MultiLender contracts.

[Tips for Using the Daily Automated Clearinghouse \(ACH\) Schedule](#)

Learn about Freddie Mac's Daily Automated Clearing House (ACH) Process for mortgages sold under the Guarantor and MultiLender Swap programs.

Loan Data

Reference Tools

[Delivery Requirements for Construction Conversion and Renovation Mortgages](#)

Provides Uniform Loan Delivery Dataset delivery instructions, tips and examples for construction conversion and renovation mortgages.

[Prepare for ULDD Phase 4a Updates](#)

This Help page identifies data delivery updates for ULDD Phase 4a and provides links to ULDD resources. **Updated March 2024**

[Prepare for ULDD Phase 5 Conversion](#)

This Help page identifies new data points and updates to existing data points for ULDD Phase 5 and provides links to ULDD resources. **Updated March 2024**

[Tips to Confirm Representation and Warranty Relief in Loan Selling Advisor](#)

Describes the collateral representation and warranty relief status information, the steps to perform to receive a status and how to view and export the status.

[Validate Loan Product Advisor and Non-Loan Product Advisor Loans in Loan Selling Advisor](#)

Guidance on troubleshooting and fixing critical error messages received for LP loans.

[Deliver Temporary Subsidy Buydowns through Loan Selling Advisor](#)

Provides instructions and tips for delivering loans with Temporary Subsidy Buydowns through Loan Selling Advisor. Such buydowns are referred to in the *Single-Family Seller/Servicer Guide* as Limited or Extended Buydown Mortgages.

[How to Deliver HFA Advantage Mortgages in Loan Selling Advisor](#)

Learn the steps on how to deliver ULDD data points for HFA Advantage mortgages through Loan Selling Advisor.

Tutorials / Videos

[Create and Modify Loans](#)

In this 15-minute tutorial, you will learn about importing loans and manually entering loans. **Updated January 2024**

[Allocating & Pricing Loans](#)

This 5-minute tutorial describes how to allocate loans to a contract and how to price those loans against the contract.

[ULDD Data Delivery Tips](#)

Provides guidance on how to deliver the Uniform Loan Delivery Dataset (ULDD) in Loan Selling Advisor to ensure accurate data and avoid data delivery errors. **Updated March 2024**

[Evaluate/Assess Loans](#)

A 20-minute tutorial that covers the process for evaluating/assessing loans, including assessment options, viewing results and clearing critical errors.

[How to Confirm Representation and Warranty Relief in Loan Selling Advisor](#)

This 15-minute tutorial provides instructions on and a simulation of receiving a collateral representation and warranty relief decision.

[Loan Pipeline: Action/Function Buttons](#)

This eight-minute video demonstrates how to use the Loan Pipeline action/function buttons to efficiently perform tasks on allocated and unallocated loans, across multiple contracts. The functions include View/Modify, Evaluate, Delete, Compare with Loan Product Advisor® and Calculate Loan Acquisition Scheduled UPB Amount. **New**

[Deliver First-Time Homebuyer Data](#)

This 4-minute video highlights the key data fields required to deliver Mortgages to Freddie Mac for First-Time Homebuyers. **Updated March 2024**

Pipeline Management and Exporting Data

Reference Tools

[Export Data](#)

Learn how to use export data using preset data sets and to create custom data sets through Loan Selling Advisor. This reference contains direct links to a video and a comprehensive mapping document.

Tutorials / Videos

[How to Use the Loan Pipeline](#)

This 15-minute tutorial provides information on how to use the Loan Pipeline to search for and manage loans. You will also learn how to use search filters, create custom result views and how to access certain loan functions.

[How to Use the Contract Pipeline](#)

This 10-minute tutorial provides information on how to use the Contract Pipeline in Loan Selling Advisor to search for and manage contracts. You will also learn how to use search filters and create custom result views.

[Export Delivery Data](#)

In this 5-minute tutorial, learn how to use export data using preset data sets and to create custom data sets in Loan Selling Advisor.

Loan Delivery

Reference Tools

[Delivery Standards for Cash](#)

Provides standards for delivering cash contracts.

[Delivery Standards for Guarantor and MultiLender Swap Programs](#)

Provides standards for delivering guarantor contracts.

[Certification Prior to Allocation](#)

Information on certifying loans before they are allocated to a contract.

[Form 996E and Form 1034E Document Delivery Flow](#)

Describes the flow of settlement documents 996E (Warehouse Provider Release and Transfer form) and 1034E (Custodial Certification Schedule) during the settlement process, highlighting the steps performed by the Seller, Warehouse Lender, Document Custodian and Freddie Mac.

[Form 996E Tips and Best Practices](#)

Learn tips and best practices for preparing and submitting Form 996E to the Warehouse Lender.

Tutorials / Videos

[Data Required for Loans Submitted Through Desktop Underwriter](#)

This 3-minute video identifies data fields required for successful delivery of Desktop Underwriter Loans submitted through Loan Product Advisor (LPA) or Loan Quality Advisor (LQA).

Funding/Settlement

Reference Tools

[Loan Selling Advisor Funding and Settlement Statement Examples](#)

Information about Settlement/Funding documents and their availability as well as how the Total Disbursement is calculated.

[Settlement Dates for Securities](#)

This calendar, also known as the settlement date calendar and issued on a rolling 9- to 12-month period, is based on settlement date information released by the Securities Industry and Financial Markets Association (SIFMA) (www.sifma.org) and may be subject to change.

[Understand the Daily ACH Process](#)

Describes the Daily ACH (Automated Clearing House) process for mortgages sold under the Guarantor and MultiLender Swap programs, which can assist Sellers in tailoring their settlement and reconciliation processes.

[Daily ACH Schedule for Securities](#)

This information, issued on a rolling 9- to 12-month period, can assist you in tailoring your settlement and reconciliation activities for the Freddie Mac Daily ACH Process, which applies to mortgages sold under the Guarantor and MultiLender Swap programs.

Tutorials / Videos

[Tips for Using the Settlement Dates for Securities Calendar](#)

In this 6-minute tutorial, learn how to use the Settlement Dates for Securities Calendar to meet Freddie Mac's delivery standards.

[Tips for Using the Daily Automated Clearinghouse \(ACH\) Schedule](#)

Understand Freddie Mac's Daily ACH process for Guarantor and MultiLender Swap transactions.

[Access, View, and Export Settlement Statements](#)

This 3-minute video provides instructions to access the Loan Purchase Statement and the Funding Details Report. It also contains a how-to video.

Document Custodians

Reference Tools

[Using Loan Selling Advisor for Document Custodians](#)

This Help page assists Document Custodians with using Loan Selling Advisor to certify mortgages for Freddie Mac.

[Document Custody Procedures Handbook](#)

Provides Document Custodians with tools to meet our requirements for document custody. It also provides additional information to Seller/Service, including pointers to facilitate the Document Custodian's process and to promote timely and accurate certification.

Tutorials / Videos

[Certifying Mortgages for Freddie Mac](#)

This 50-minute tutorial describes the methods of certifying a note as well as managing the loans during the certification process. Updated February 2024

Warehouse Lenders

Reference Tools

[Export and Import Tips for Warehouse Lenders](#)

Provides detailed steps for exporting data and the steps for importing the updated data back into Loan Selling Advisor.

[Using Loan Selling Advisor for Warehouse Lenders](#)

This Help page assists warehouse lenders with using Loan Selling Advisor to release and relinquish, transfer and assign to Freddie Mac their rights, title and interest in Pledged Mortgages identified on Appendix 1 (Schedule of Pledged Mortgages) of Form 996E, *Warehouse Provider Release and Transfer*.

Tutorials / Videos

[Record and Release Pledged Mortgages for Freddie Mac](#)

This 15-minute tutorial provides instructions on how to release and record your interest in a Pledged Mortgage in Loan Selling Advisor.

Servicing-Released XChange®

Reference Tools

[Servicing-Released XChange Training Resources](#)

This document lists various resources available on Freddie Mac Learning for Freddie Mac's Servicing-Released XChange executions and options. Updated March 2024

For a catalog of all Freddie Mac Learning resources, visit:

<https://sf.freddiemac.com/docs/pdf/fact-sheet/freddie-mac-learning-catalog.pdf>