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. Click on the title to access the resource.

Cash-Released XChange®

Reference Tools

Cash-Released XChange® User Guide

Accessed through Loan Selling Advisor® under the Settlements menu, the user guide contains important information on how to package and deliver documents to the Transferee Servicer under the Cash-Released XChange execution.

Servicing Released Premium Adjustment Guide

Identifies contract and loan data fields subject to SRP adjustments for mortgages sold through Cash-Released XChange.

Import Servicing Loan Numbers

This reference is for Cash-Released XChange Transferee Servicers. It provides instructional information on how to use Loan Selling Advisor to import Servicing loan numbers.

How to Request Seller Access to XChange Center[SM]

Learn how to request access to the XChange Center using Freddie Mac Access Manager. Use Access Manager to request the Seller (Transferor Servicer) user role of External CRX Preference Admin to edit Servicer (Transferee Servicer) preferences.

Document Custodian Options for Cash-Released XChange®

Learn how to request a preferred document custodian for mortgages sold through Cash-Released XChange.

XChange Center Help – Seller

This online guide offers help for the XChange Center-Seller application. Use it for assistance with navigating the application and to access step-by-step procedures and tips for best practices. XChange Center provides Cash-Released XChange Transferor Servicers the ability to create, edit and manage Transferee Servicers preferences for loans sold to Freddie Mac through Loan Selling Advisor.

XChange Center Help – Servicer

This online guide offers help for the XChange Center-Servicer application. Use it for assistance with navigating the application and to access step-by-step procedures and tips for best practices. The XChange Center provides Cash-Released XChange Transferee Servicers the capability to create, manage and reconcile their Servicing-Released Premium (SRP) grids.

Tutorials

[Freddie Mac Cash-Released XChange® Overview](#)

Provides a high-level description of the Cash-Released XChange and Freddie Automated Servicing Transfer (FAST®) processes.

[Fundamentals of Cash-Released XChange®](#)

This 25-minute tutorial highlights the fundamentals of the Cash-Released XChange process for selling mortgages servicing released using Guide Exhibit 28A, including key steps for taking out a contract and contract fulfillment.

[Managing Servicer Preferences in XChange Center℠](#)

In this 5-minute video, learn how to use the XChange Center to edit Servicer (Transferee Servicer) preferences and edit premium and haircut values.

[Request Seller Access to XChange Center℠](#)

In this 3-minute video, Sellers (Transferor Servicers) will learn how to request access to the XChange Center to manage Transferee Servicer preferences. Access is granted through Freddie Mac Access Manager.

Co-Issue XChange®

Reference Tools

[Co-Issue XChange Online Help – Seller](#)

This online guide offers help for the Co-Issue XChange application for Sellers (Transferor Servicers). Use it for assistance with navigating the application and to access step-by-step procedures and tips for best practices. Sellers use Co-Issue XChange to retrieve SRP pricing information for loans sold through Co-Issue XChange.

[Co-Issue XChange Online Help – Transferee Servicer](#)

This online guide offers help for the Co-Issue XChange application for Transferee Servicers. Use it for assistance with navigating the application and to access step-by-step procedures and tips for best practices. Transferee Servicers use Co-Issue XChange to manage their servicing released premium (SRP) grids for Seller consumption for loans sold through Co-Issue XChange.

[Deliver Accurate Data for Cash Loans Sold Through Co-Issue XChange®](#)

Learn how to deliver the Loan Acquisition Scheduled UPB Amount and Last Paid Installment Due Date data points for Cash loans sold through Co-Issue XChange when the loan's Freddie Mac Funding Date is after the 10th of the month. New

Correspondent XChange®

Reference Tools

[Third Party Help](#)

Step-by-step instructions for Aggregators and Originators on how to use and navigate Loan Selling Advisor for loans transferred through the Correspondent XChange.

[Correspondent XChange Process Flow](#)

This process flow shows the basic loan data transfer process using Loan Selling Advisor.

Tutorials

[Correspondent XChange® Originator Pipeline](#)

This 20-minute tutorial provides guidance and instruction on how to use Loan Selling Advisor to create and manage loans you intend to transfer to an Aggregator. You'll also learn how to clear edits, submit loans and manage your Originator Pipeline.

Freddie Automated Servicing Transfer (FAST®)

Reference Tools

[Freddie Automated Servicing Transfer (FAST®) Help System](#)

Learn how to upload loan documents to the Transferee Servicer for mortgages sold through Cash-Released XChange and Co-Issue XChange® and how to troubleshoot errors.

[FAST® Daily Reconciliation Summary Report](#)

Transferor Servicers receive a daily reconciliation summary report through the FAST tool. It contains servicing file transfer activity for the most recent 90-day period.

[FAST® Co-Issue XChange® Imaged Document Checklist](#)

For Co-Issue XChange Transferor Servicers to use when submitting servicing transfer documents through FAST to Co-Issue XChange Transferee Servicers.

[FAST® Co-Issue XChange® Final Document Checklist](#)

For Co-Issue XChange Transferor Servicers to use when forwarding final recorded documents to Co-Issue XChange Transferee Servicers.

Tutorials

[Request or Modify Access to FAST®](#)

Watch this 5-minute video to learn how to request or modify access to Freddie Automated Servicing Transfer (FAST®) tool.

[Freddie Automated Servicing Transfer (FAST®) Delivery User Interface (UI) Tool](#)

Learn about Freddie Mac's FAST Tool for servicing file transfers. FAST simplifies and speeds up the servicing file transfer process letting you upload servicing documents to the Transferee Servicer, for mortgages sold through Cash-Released XChange and Co-Issue XChange.

> For a catalog of all Freddie Mac Learning resources, visit:
> https://sf.freddiemac.com/content/_assets/resources/pdf/fact-sheet/freddie-mac-learning-catalog.pdf