

## Uniform Collateral Data Portal Reference Series for the Lender Admin: 4 - Managing Lender Agents

This reference is the fourth in a series of five references for the Lender Administrator, a Uniform Collateral Data Portal<sup>®</sup> (UCDP<sup>®</sup>) user who has authority to set up and manage the business structure within the portal, including the access privileges of other users. This user is known as the lender admin. The focus of this reference is on managing lender agents, which are third-party entities that a lender authorizes to perform functions within the UCDP, such as uploading appraisals, sharing appraisals, and evaluating results. The other references in this series include:

- Series 1: Lender Admin Registration
- Series 3: Managing Users

Series 2: Managing Business Units

Series 5: Managing Aggregator Profile

The topics covered in this reference include:

- Managing Relationships with Lender Agents Overview
- Inviting a Lender Agent
- Assigning and Removing Seller Numbers
- Updating a Lender Agent Relationship
- Finding Additional Assistance





Managing Relationships with Lender Agents Overview	A lender agent is a third-party entity that a lender authorizes to perform functions within the UCDP, such as uploading appraisals, sharing appraisals, and evaluating results. As the lender admin, you are responsible for authorizing lender agents to perform these tasks on behalf of your organization. The appraisal data files submitted by a lender agent on behalf of your organization become part of your business unit structure and can be viewed by the lender and returned in lender-initiated searches and reports. Lenders may also take actions on these appraisal data files as if they had submitted them directly. Similarly, the appraisals shared by a lender agent on behalf of your organization can be searched via the appraisal sharing. Lender agents must be authorized by both GSEs to be listed in the UCDP lender agent dropdown. Lender agents must complete the <b>UCDP Lender</b> <b>Agent Registration Form</b> on either Fannie Mae's website or Freddie Mac's website to request an account.			
	Once the lender agent completes the UCDP lender agent registration and account setup, their name appears in the lender agent dropdown on the <i>Relationships</i> page in the UCDP. From there, you can identify and select one or more lender agents to submit appraisals on your organization's behalf to the UCDP. The <i>Relationships</i> page provides you, the lender admin, with functionality to manage your lender agent relationships. On this page, you may complete the following tasks:			
	Functionality Description			
	Inviting a Lender AgentEnables you to invite a lender agent who is in the lender agent dropdown into an established business unit.			
	Assigning and Removing Seller NumbersEnables you to assign and remove Seller Numbers you want the lender agent to work under once the lender agent is invited.			
	Updating a Lender Agent RelationshipEnables you to change the status of the relationship from active to inactive and vice versa.			

This communication relates to the Uniform Mortgage Data Program®, an effort undertaken jointly by Fannie Mae and Freddie Mac at the direction of their regulator, the Federal Housing Finance Agency.







Inviting a Lender Agent	This section covers how to initiate setting up a relationship with a lender agent. After you invite a lender agent to establish a relationship with your organization, the lender agent receives an email inviting them to submit appraisal data files on your organization's behalf. To become an active lender agent for your organization, the agent must log in to the UCDP and accept the invitation.	
	When inviting the lender agent, set the permission level to "Full":	
	With a permission level of "Full", the lender agent can perform all of the functions of a lender user, including submitting appraisals, viewing results, requesting overrides, searching for appraisals, scheduling and viewing reports, and viewing all findings related to appraisals submitted on your organization's behalf. This includes UAD Compliance Check messages, and in the future will include all proprietary GSE findings that may be delivered as part of the appraisal results through the UCDP. In addition, the lender agent may share appraisals submitted by the lender agent on behalf of the lender.	
	<i>Note</i> : The "Limited" lender agent permission level will be retired in the UCDP in the future and should no longer be used in the lender agent invitation.	
	To invite a lender agent, follow these steps:	





Inviting a Lender Agent			
Ste	₽p	Action / Result	
1.	From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.	<complex-block>         Interm Collateral Data Portal       Image: Control Collateral Data Portal       Image: Collateral Data Por</complex-block>	
2.	From the <i>Administration</i> – <i>Home</i> page, click <b>Relationships</b> in the left navigation bar.	Uniform Collateral Data Portal       Image: Construction of the second of	
	Click the Sign to display the list of lender agents associated with that business unit.	<ul> <li>Click on a business unit name to manage the business unit.</li> <li>Click on a business unit name to manage the business unit.</li> <li>Click on "Users" to manage the users in the business unit.</li> <li>Expand the "Users" item and click on a user's name to modify that user.</li> <li>Regular users are displayed in blue and Direct Integration users are displayed in orange and the view.</li> <li>Some user operations may not take effect immediately. Click on the refresh button on the left to refresh the view.</li> </ul>	





Inviting a Lender Agent			
Step	Action / Result		
	After you select Relationships from the left navigation bar, the Administration - Relationships page appears.          Uniform Collateral Data Portal       Image: Im		
<ul> <li>3. From the Administration - Relationships page, select the:</li> <li>Lender agent you wish to invite from the Lender Agent dropdown.</li> <li>Permission level (full) from the Lender Agent Permissions dropdown.</li> </ul>	your organization.		





Inviting a Lender Agent		
Step	Action / Result	
	After you click <b>Invi</b> <b>lender agent]</b> mes a "Pending" status invitation.	ite, a <b>You have successfully invited [name of the</b> ssage appears. The Current Relationships section shows until the lender agent accepts or declines the relationship
	G Training Lender	Relationships
	Training Lender	You have successfully invited Jim's Agency
	Training Lender  Seller Numbers  Relationships  Relationships  UCPR Amprical Approv	Invite a Lender Agent Training Business Unit Training Lender Agent Len
	H- Business Units	Update a Relationship
		Select Relationship* V Lender Agent Permissions* Status Change Status V Update To
		Current Relationships
		Relationship Name Lender Agent Name Business Unit Number Permissions Status
		Training Lender-Jim's Agency         Jim's Agency         EVD18140         FULL         PENDING           Training Lender-Training Lender Agent         Training Lender Agent         VD\$71636         FULL         PENDING
	The lender agent to accepts the invitation organization and the section changes to If the lender the request to to <u>Updating</u> and Even though the leader active Seller Number enable the lender a This feature is in p activity to the lender Numbers(s), the leader organization submit	hen receives an email invitation. If the lender agent ion, the UCDP creates the relationship between your he lender agent. The status in the Current Relationships o "Active". agent has not yet accepted the invitation, you can cancel by updating the lender agent's status to "Inactive". Refer a Lender Agent Relationship. ender agent has been invited into a business unit that has ber(s), you must assign specific Seller Number(s) to agent to submit appraisals on your organization's behalf. lace to limit the exposure of your entire organization's er agent. Even with that business unit and Seller ender agent only has access to appraisal data files their itted. Refer to <u>Assigning and Removing Seller Numbers</u> on.





Assigning and Removing Seller Numbers	For the lender agent to submit appraisals on your organization's behalf, you must assign a Seller Number(s). For Fannie Mae, the Seller Number is your Seller/Servicer Number or Non-Seller/Servicer Number ID. For Freddie Mac, the Seller Number is your Seller/Servicer Number or Third Party Originator (TPO) Number.	
	You may assign a Seller Number(s) as soon as you invite the lender agent, even though the status may still be "Pending". Once a lender agent accepts the invitation and has an assigned Seller Number(s), the lender agent can begin submitting appraisals for your organization under the assigned Seller Number(s).	
	Typically, organizations submit appraisals under one Seller Number for each GSE. If your organization submits appraisals under more than one Seller Number for a given GSE, you have the flexibility to determine which Seller Number(s) the lender agent uses without exposing all of your organization's activity.	
	To assign and remove Seller Numbers to and from a lender agent, follow these steps:	

Assigning and Removing Seller Numbers			
Step	Action / Result		
1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.	Uniform Collateral Data Portal       Readeline com       Logarity         Uniform Collateral Data Portal       Readeline com       Imma d'Une       Im		
	After you select <b>User and Business Unit Administration</b> , the <b>Administration - Home</b> page appears.		

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Assigning and Removing Seller Numbers			
Ste	eb de	Action / Result	
2.	From the Administration – Home page, click the In front of Relationships to open that node.	Uniform Collateral Data Portal       Image: Im	
3.	Click the name of the lender agent to which you are assigning a Seller Number(s).	Some user operations may not take effect immediately. Click on the refresh button on the left to refresh the view. After you click the I the list of authorized lender agents appears.          Image: Click on the refresh button on the left to refresh the view.         After you click the I the list of authorized lender agents appears.         Image: Click on the refresh button on the left to refresh the view.         After you click the I the list of authorized lender agents appears.         Image: Click on the refresh button on the left to refresh the view.         Image: Click on the refresh button on the left to refresh button on the left to refresh the view.         Image: Click on the refresh button on the left to refresh button o	
		After you select the lender agent, the <i>Administration – Relationship Details</i> page appears for that lender agent.	





Assigning and Removing Seller Numbers		
Step	Action / Result	
4. From the Administration – Relationships Details page, click Edit to access the Administration - Seller Numbers page.	<complex-block>         Uniform Collateral Data Portal       Image: I</complex-block>	
	Number to/from the lender agent.	
Assigning Seller Numbers 5. From the Administration - Seller Numbers page, locate the list of Available Seller Numbers. Highlight a specific Seller Number in the list and select Add. The Available Seller Numbers list is populated with the same Seller Numbers(s) assigned to the business unit who invited the lender agent into a relationship. The Add all button allows you to assign all the Available Seller Numbers to the lender agent at one time.	Training Lender 7 Training Lender 7 Training Lender     Image Lender  <	





Assigning and Removing Seller Numbers		
Step	Action / Result	
	After you select Ad Seller Number.	Id, the Assigned Seller Numbers list shows the added
<ul> <li>Removing Seller Numbers:</li> <li>6. From the Administration Seller</li> <li>Numbers page, locate the list of Assigned Seller Numbers. Highlight a specific Seller Number</li> </ul>	Training Lender > Training Lender-Training Lender  Training Lender  Training Lender  Training Lender  Seller Numbers Seller Numbers Ektionships Fraining Lender Agent UCP Appraisal Agency Business Units	Nder Agent
A lender agent needs at least one assigned Seller S	Once you remove S submissions in that the agent and the le Seller Number to a to a different active	Seller Numbers from a business unit or a relationship, the t business unit using those seller numbers are still visible to ender, but they become read-only (except to change the n active one, if one exists). Changing those submissions e Seller Number makes the submissions read/write again.





Assigning and Removing Seller Numbers			
Step	Action / Result		
	After you select <b>Re</b> Number removed a	move, the Assigned Se and now in the Available	ller Numbers list shows the Seller Seller Numbers list.
	Sa Training Lender	Seller Rumbers	
	Training Lender	Available Seller Numbers	Assigned Seller Numbers
G Older Numbers Relationships Training Lender Agent UDP Appraisal Agency G Business Units	5679567	Add all >> Add > < Remove << Remove all	
		Evaluation Marc	
	Available Seller Numbers	Assigned Seller Numbers	
		1234123	Add all >>> Add > < Remove (< Remove all





Updating a Lender Agent Relationship	Once the lender agent has accepted the invitation, you can update their status. For example, you can change the status from "Active" to "Inactive" and vice versa.		
	Unlike a user (lender admin, lender user, read-only lender user, or lender corragg user) or a business unit, you cannot permanently delete a lender agent. You can, however, leave it in an "Inactive" status.		
	The lender corragg user role has access to the appraisal sharing functionality.		
	To update a lender agent relationship, follow these steps:		



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Updating a Lender Agent Relationship			
Step	Action / Result		
2. From the Administration – Home page, click Relationships in the left navigation bar.	Uniform Collateral Data Portal <sup>®</sup> TannieMae <sup>®</sup> Mac <sup>Freddick</sup> <u>Freddickac com</u> <u>Tems of Use</u>   <u>Tems of Use</u>   <u>Tems of Use</u>   <u>User ID: TRAINER_1</u> <u>None</u> Administration - Home Training Lender		
Click the Sign to display the list of lender agents associated with that business unit.	Training Lender         Users         Celler Numbers         Relationships         Business Units    Wetcome Karan T          Type for managing your business units and users:         Click on I in the view on the left to expand an item and view its contents.         Click on I in the view on the left to expand an item and view its contents.         Click on I users units         Click on Users' to manage the business unit.         Click on Users' to manage the users in the business unit.         Expand the "Users" item and click on a user's name to modify that user.         Expand the "Users" item and click on a user's name to modify that user.         Borne user operations may not take effect immediately. Click on the refresh button on the left to to refresh the view.    After you select Relationships, the Relationships page appears. The middle		
3 From the	section of this page, Update a Relationship, allows you to change the relationship status granted to the lender agent.		
<i>Relationships</i> page, click the <b>Select</b> <b>Relationship</b> dropdown to select the lender agent relationship you want to update.	Uniform Collateral Data Portal <sup>®</sup> Prannie Mae <sup>®</sup> Preddie <sup>®</sup> <u>Terms of Use</u> <u>League</u> <u>Dives</u> <u>User Ib: TRAINER_1</u> <u>Helip Center</u> Administration - Relationships Training Lender Training Lender Training Lender Training Lender <u>Sters</u> <u>Business Unit</u> <u>Training</u> <u>Lender Agent</u> <u>Stert Lender Agent Permissions*</u> <u>- Select Permissions*</u>		
As applicable, click the <b>Change Status To</b> dropdown to update the status from "Active" to "Inactive" and vice	Relationships Invite		
versa. Click <b>Update</b> .	Current Relationships         Ender Agent Name         Business Unit Number         Permissions         Status           Relationship Name         Lender Agent Name         Business Unit Number         Permissions         Status           Training Lender-Im's Agency         Jim's Agency         EV018140         FULL         PENDING           Training Lender-Training Lender-Agent         Training Lender Agent         VD571636         FULL         ACTIVE		





Updating a Lender Agent Relationship		
Step	Action / Result	
	After you click <b>Update</b> , different messages appear based on the changes made. If you changed the status from "Active" to "Inactive", for example, a warning message appears asking you to confirm the action.	
	Windows Internet Explorer       Image: Constraint of the system of the sys	
	C Training Lender Relationships	
	Training Lender       Invite a Lender Agent         Seller Numbers       Business Units         Business Units       Invite a Lender Agent         Update a Relationship       Invite         Select       Lender Agent	
	Permissions*         Update         Change Status         To         Update         Current Relationships         Relationship Name         Lender Agent Name       Business Unit Number       Permissions       Status         Training Lender-Jim's Agency       Jim's Agency       EYD18140       FULL       PENDING         Training Lender-Training Lender Agent       Training Lender Agent       VDS71636       FULL       PHACTIVE	
	If the lender agent's status is changed to "Inactive", the lender retains access and all functionality associated with the appraisal data files.	
	The lender agent also has the ability to change the status of the relationship from "Active" to "Declined" at any time.	





Finding Additional	For additional assistance, refer to:
Assistance	<ul> <li>Fannie Mae's UCDP web page</li> </ul>
	( <u>https://www.fanniemae.com/singlefamily/uniform-collateral-data-</u> portal)
	Freddie Mac's UCDP web page
	( <u>http://www.freddiemac.com/singlefamily/sell/uniform_collateral_data</u> _portal.html )
	<ul> <li>The UCDP Support Center at 1-800-917-9291</li> </ul>
	<ul> <li>UCDP Help Center (accessible after you log in to the UCDP)</li> </ul>

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