





Uniform Collateral Data Portal (UCDP) Reference Series for the Lender Admin

This five-part reference series, jointly developed by Freddie Mac and Fannie Mae, guides the lender admin through completing administrative tasks in the UCDP. The lender admin is a UCDP user who has authority to set up and manage the business structure within the portal, including the access privileges of other users. The five references in this series include:

- <u>Series 1: Lender Admin Registration</u> This reference focuses on getting started with the UCDP, including an overview, a user structure and roles discussion, and step-by-step instructions for completing the lender administrator's registration.
- Series 2: Managing Business Units This reference provides step-by-step instructions for setting up and managing a business unit(s) within the UCDP.
- <u>Series 3: Managing Users</u> This reference provides step-by-step instructions for adding users and managing their access rights to the UCDP, including changing passwords, changing a user's role, and revoking a user's access.
- <u>Series 4: Managing Lender Agents</u> This reference provides step-by-step instructions for inviting and managing the access rights of lender agents in the UCDP. Lender agents are third-party entities authorized to perform tasks on the lender's behalf.
- Series 5: Managing Aggregator Profile This reference provides step-by-step instructions for setting up and managing an Aggregator profile within the UCDP. The aggregator must set up a profile in order to use the appraisal sharing features.

The references are also available on FreddieMac.com and FannieMae.com.

August 2020 Page 1