Grant Users Access to PAID Using Freddie Mac Access Manager

This quick reference explains the process of obtaining access to the PAID servicing tool through Freddie Mac Access Manager (FAM). This document will lead an administrator from granting a user access to the PAID application to accessing the PAID system from the Servicing Gateway. The following topics will be covered:

- [Role of the Executive Administrators](#)
- [Primary Elevated Role](#)
- [How to grant users access to PAID](#)
- [How to access PAID](#)
- [PAID User Roles](#)
- [How to get additional help](#)

What is the role of the Executive Administrators and what are they required to do?

In order for Primary and Secondary Administrators to provision PAID access to additional users, individuals with the Executive Administrator or the Primary Elevator role <u>must</u> add PAID Access Authorizations to applicable Primary and Secondary Administrators.

What is the Primary Elevated role?

A new Administrator Type, Primary Elevated, is available for assignment in Freddie Mac Access Manager. Primary Elevated Administrators can provision access to all applications, roles, and counterparty numbers for their organization.

How do I grant users access to PAID?

Follow the steps to create a new user and give that user access to specific Freddie Mac applications and/or tools along with respective user role(s). The following process is available to the following user roles: Executive with Primary Admin, Primary Elevated Admin, Primary Admin, and Secondary Admin. For an additional visual reference on how to create a new user in Freddie Mac Access Manager with access to a specific application, view the following videoclip or use the detailed steps below: [Create New User with Access](#)

NOTE: The Executive and Primary Elevated Admins will need to grant other Admins the ability to provision future or new Freddie Mac tools. The Primary Elevated role will automatically be given provisioning rights to anyone.

1. From within Freddie Mac Access Manager, click the menu.
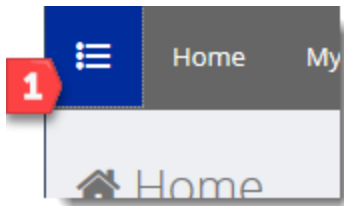
2. Select the **Manage User Accounts** drop-down.

3. Select **Create New User with Access**. The Create New User with Access page opens.

4. Complete the required fields: First Name, Last Name, Phone Number, Email.

5. Click **Next**. The Add User Access page displays.

6. From the Add User Access page, click on the Application Name drop-down list to select a specific application. You will select Payments Automated Intelligent and Dynamic – PAID for the application.

7. Role and the Counterparty Numbers fields will appear for you to complete. Complete the Role and Counterparty Numbers a.k.a. Seller/Servicer number as applicable.

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:John Smith

Application Name

Payments Automated Intelligent and Dynamic-PAID   **6** ∨

Role

Expense Analyst User   **7** ∨

Role Description

Role will allow user to create, modify, and submit expenses for all capabilities. This role will be given to servicers or sub-servicers employees, who handle reimbursement process.

Counterparty Numbers

[   ]   **7** ∨

	✕
	✕
	✕
	✕
	✕

Show 18 More...

8 ☑ 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.

9 ☐ Add to Selected Access

A summary of the selected access.

Selected Access *

[   ]   +

CANCEL   BACK   NEXT

8. If applicable, check the **Select All Counterparty Numbers** checkbox to associate all Counterparty numbers to the User.

9. You must select the **Add to Selected Access** checkbox which triggers the addition of your requested access.

10. Confirm the designated application, role, and counterparty number listed under the "A summary of the selected access" section as shown below. To provision and permit additional Freddie Mac application access, repeat steps 6 through 10, if not, proceed to step 11.

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:John Smith

Application Name

[   ] ⌄

A summary of the selected access.

Selected Access *

[   ] +

PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×

Show 18 More...

CANCEL   BACK   NEXT

11. Click **Next**. The Confirm Request page appears. Take time to review and confirm information you have entered.

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:John Smith

Application Name

[   ] ⌄

A summary of the selected access.

Selected Access *

[   ] +

PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×
PAID-Expense Analyst User·	×

Show 18 More...

CANCEL   BACK   NEXT

12. Click **Submit** to complete the process and return to the home page.

13. Once the request has been completed, two e-mails will be sent out to the newly created user. The first e-mail contains the user's account ID, and the second e-mail contains a temporary password. See the two example e-mails below.
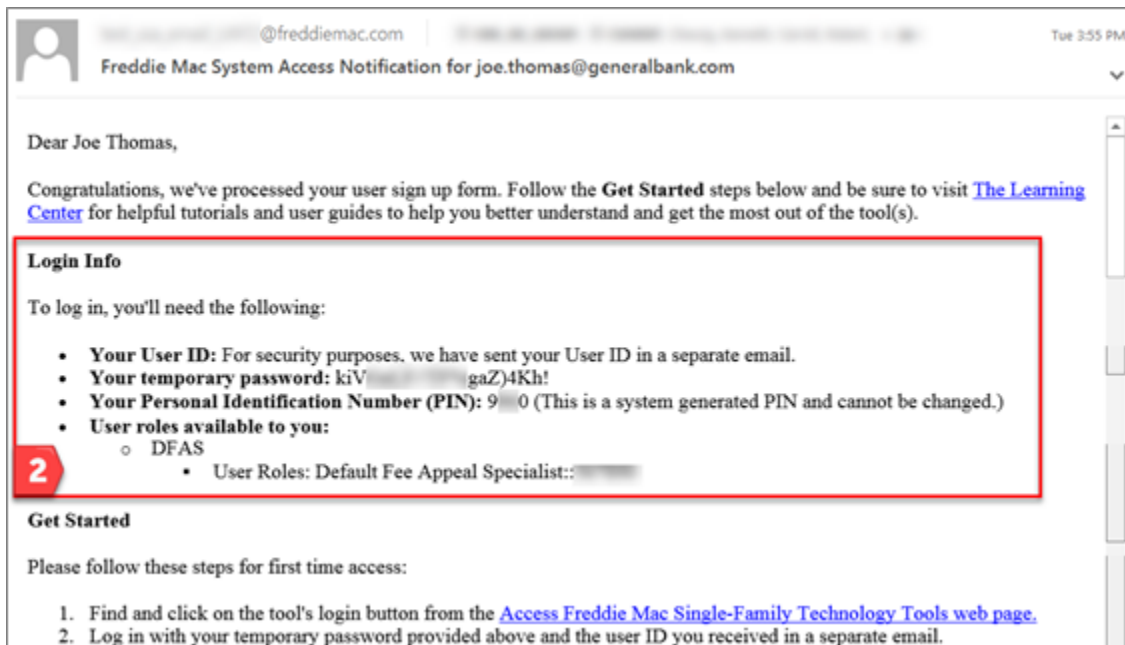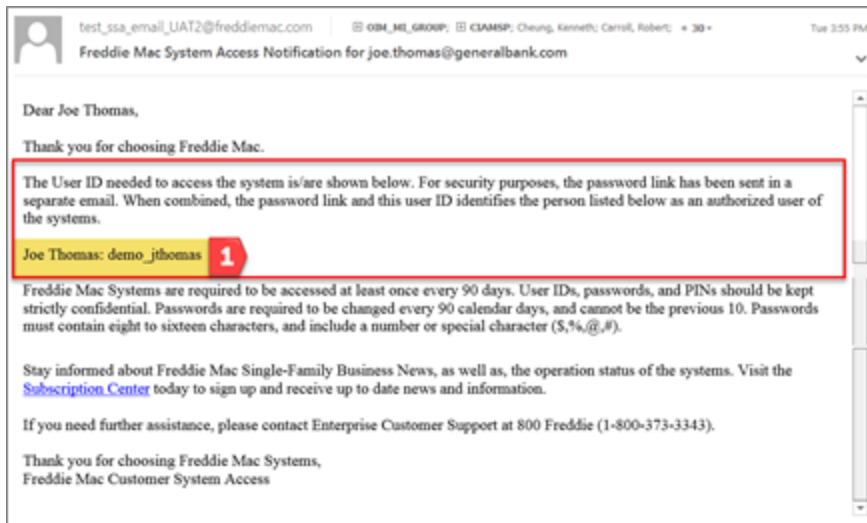
14. Use the email and password that was sent to access PAID through the Servicing Gateway.

How to Access PAID

Users can access PAID through the Servicing Gateway. The functions that you will be able to perform in the system are dependent on your access credentials.

Complete the following steps to log into PAID:

1. If you are an existing user, use your previous login credentials to log into the Servicing Gateway (https://sg.freddiemac.com). You will now have access to any new applications that were provisioned to you.

    If you are a newly created user, use the credentials provided in the Freddie Mac System Access Notification emails, including the temporary password. Change the temporary password to a more permanent password when logged in.
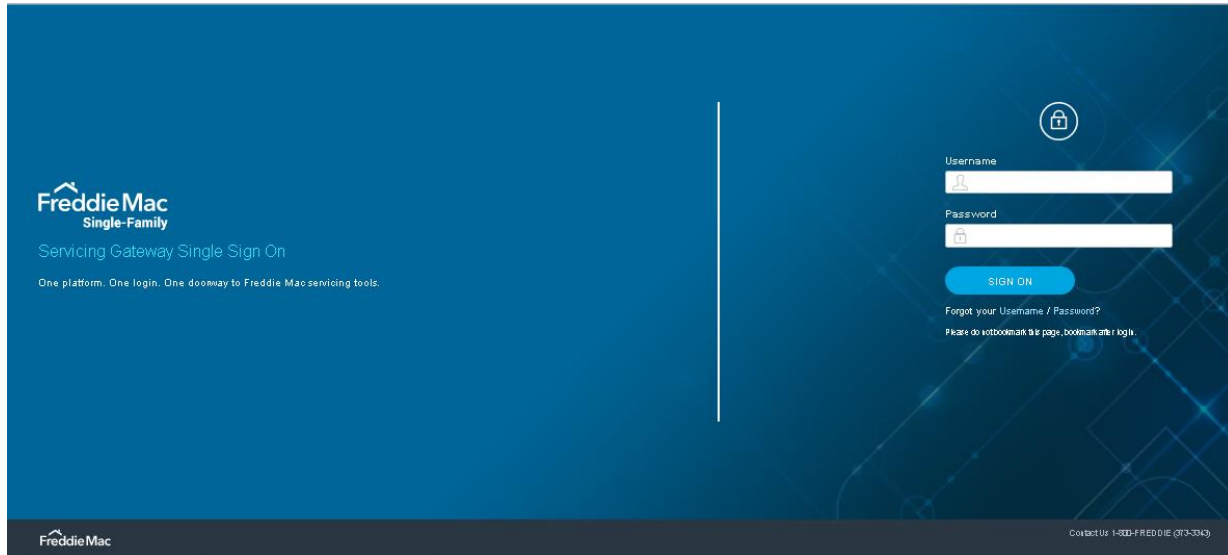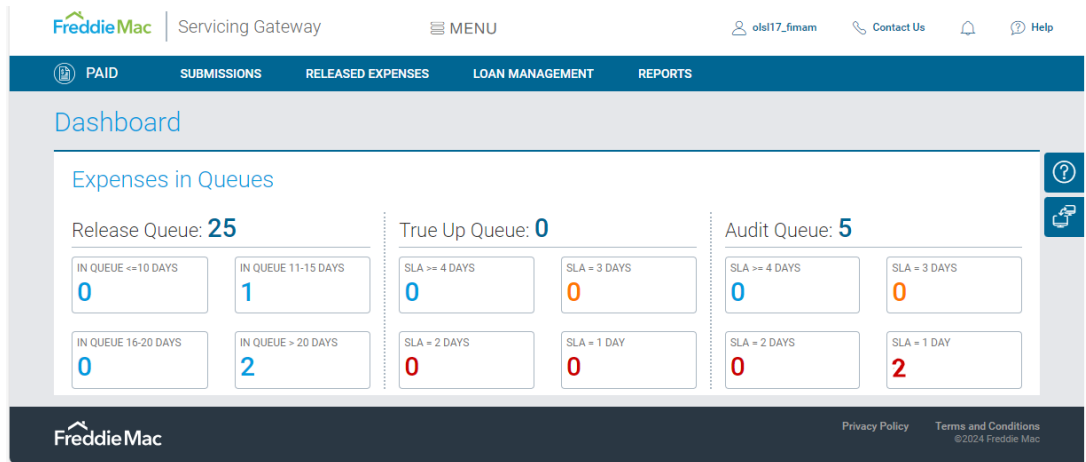

2. Enter your User ID and Password and click **SIGN ON**. The Servicing Gateway menu displays tools you have been provisioned to access.

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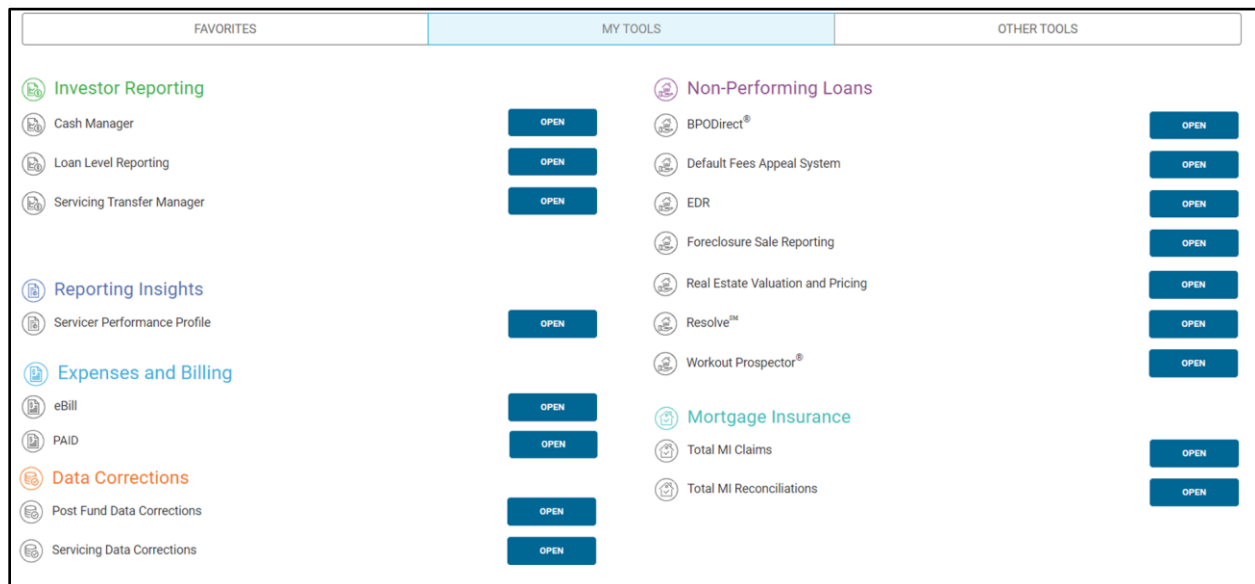
3. Click on **OPEN** to the right of PAID. The PAID Dashboard (Home page) displays.

PAID User Roles

The following table identifies the user roles available to be provisioned for PAID:

User Role:	Access:

Expense Read-Only	Allows the user to:
	▪ View expenses and attachments that have been submitted by other users within their organization
	▪ Have read-only access to the following PAID screens:
	  ▪ Expense Builder
	  ▪ Bulk Upload and Previous Bulk Upload
	  ▪ Released, Audit and True Up Expenses work queues
	  ▪ Search Expenses within Loan Management
	The user cannot access:
	▪ Bulk Upload functionality
	▪ Draft Upload functionality
	▪ Reports functionality
	▪ View or attach loan-level documents

Expense Analyst	Allows the user to: • Create, modify and submit expenses via Expense Builder and Bulk Upload. • Access the Released Expenses work queues functionality (except True Up) • Access Loan Management functionality • Submit a request for payment

	• Access all attachments within their portfolio The user has read-only access to the True Up queue.

Vendor Access -
Expense Property
Preservation
	Allows the user to perform these functions only for those expenses submitted by the user or others in their organization:
	
	▪ Create, modify and submit expenses via Expense Builder
	▪ Access the following PAID screens:
	  ▪ Bulk Upload
	  ▪ Draft Bulk Uploads
	  ▪ Previous Bulk Uploads
	▪ Access the Released Expenses work queue functionality (cannot access the True Up and Audit queues)
	▪ Access Loan Management functionality including the ability to submit Appeals and Withdrawals
	▪ Access expenses and attachments
	
	The user does not have access to:
	
	▪ View, attach or download loan-level documentation.
	▪ Submit a request for payment

Vendor Access – Expense Attorney Firm	Allows the user to perform these functions only for those expenses submitted by the user or others in their organization: ▪ Create, modify and submit expenses via Expense Builder. ▪ Access Bulk Upload, Draft Bulk Uploads, and Previous Bulk Uploads ▪ Access the Released Expenses work queue functionality (cannot access the True Up and Audit queues) ▪ Access Loan Management functionality including the ability to submit appeals and withdrawals The user does not have access to: ▪ View, attach or download loan-level documentation ▪ Submit a request for payment

Questions?

If you have any questions after reviewing this quick reference, please contact the Customer Support Contact Center at (800-FREDDIE) or your Freddie Mac representative.

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