





# **Uniform Collateral Data Portal® (UCDP®) User Interface (UI) Changes**

**June 2025** 

#### Introduction

To help simplify the submission of appraisal files through the Uniform Collateral Data Portal® (UCDP®) and expedite access to the Submission Summary Report (SSR), Fannie Mae and Freddie Mac (the GSEs) have implemented changes to the user interface (UI). These changes are effective June 14, 2025. Read this step-by-step job aid to get familiar with the latest enhancements in UCDP.

#### Who should read this Job Aid?

The new screens and features described in this document will be available to all registered users through the UCDP UI. This job aid is intended for lenders and appraisal management companies (AMCs) that use UCDP to submit appraisal reports to the GSEs and/or view the SSR results.

### What do you need to do to access the new webpages?

We've simplified the UCDP experience so that UI users can access the new screens when they login to their account.

## Stay up to date with UCDP

Additional resources and guidance about UCDP are available on the <u>Fannie Mae UCDP webpage</u> or the <u>Freddie Mac UCDP</u> webpage.

**NOTE:** Bookmark these pages for future reference.

### What's in this Job Aid?

## **Section 1: Login and Home Pages**

- Modernized Login and Home Pages
- Universal Search and Quick Search features
- Refreshed User Preference and Account Self Care

## **Section 2: Submit Appraisal**

Streamlined Submit Appraisal Page

## **Section 3: Search Appraisal and Results**

- Re-organized Search Page
- Simplified Search Results

## **Section 4: New User Registration**

- Modernized Registration Webpages for Users Created in UCDP
- Modernized Registration Webpages for Users Invited in UCDP

## **Frequently Asked Question**

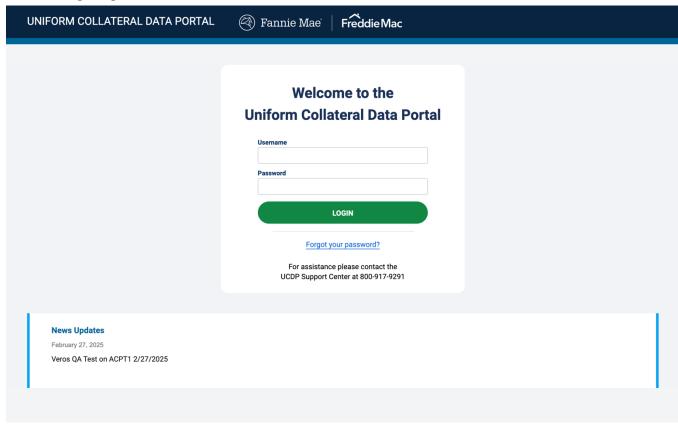
## **Section 1: Login and Home Pages**

#### **Modernized Login and Home Pages**

Access the UCDP UI through the current URL: <u>www.uniformdataportal.com</u>. Existing users can log in to UCDP by entering their valid username and password.

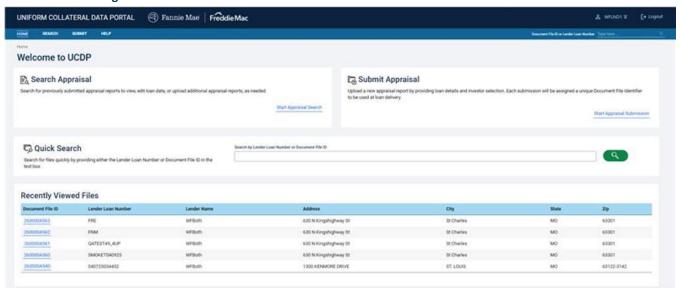
Links to navigate to fanniemae.com or freddiemac.com pages, including their respective Terms and Conditions and Privacy Policies, and contact information for the UCDP Support Center, are in the UI footer across all pages.

#### 1.1 UCDP Login Page



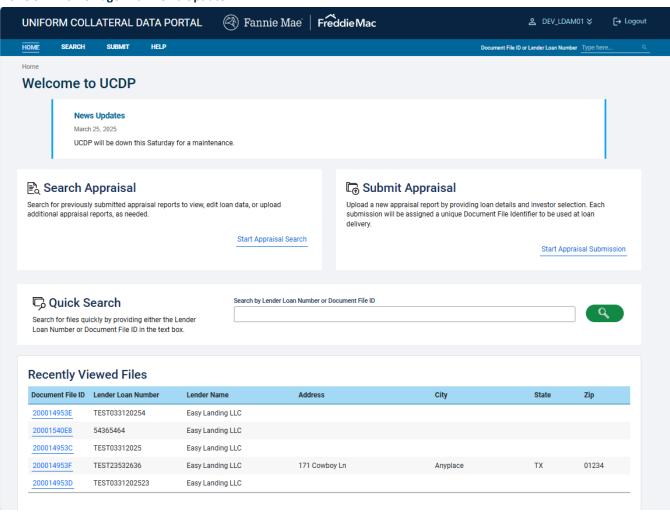
The *Home Page* serves as the default landing page when users first log in to UCDP. From here, users can search for existing appraisal reports, submit new appraisal reports, or update their preferences.

#### 1.2 UCDP Home Page



Users can view important notifications through the **News Updates** section which will display at the top of the *Home Page* when an update is published. The **News Updates** notifications will appear on the *Home Page* while the update is displayed on the UCDP *Login Page*.

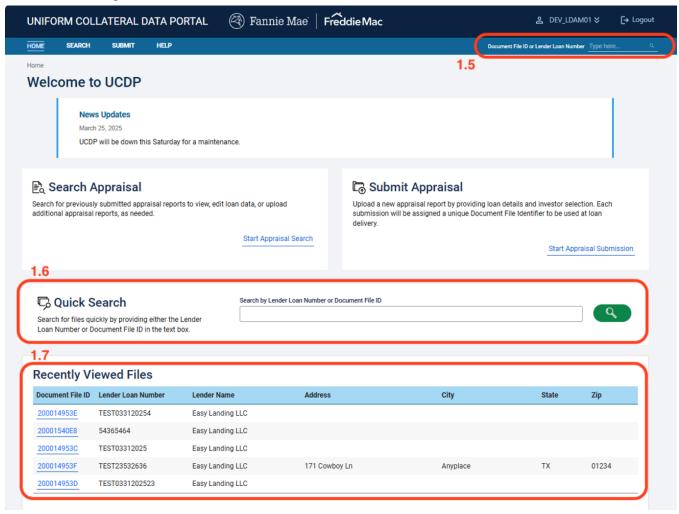
#### 1.3 UCDP Home Page with News Update



#### **Universal Search and Quick Search features**

The *Home Page* provides easy access to perform a **Quick Search** for appraisal reports, see **Recently Viewed Files**, and navigate to the *Search Appraisal* and *Submit Appraisal* pages.

#### 1.4 UCDP Home Page New Search Features



#### 1.5 Universal Search Bar



Located at the top right corner of the **UCDP Navigation Bar**, the **Universal Search Bar** allows you to search by Document File ID or Lender Loan Number. This feature is accessible from any of the main navigation pages (e.g., *Home, Search, Submit Appraisal, Help*) and *User Preference* page.

#### 1.6 Quick Search



Quick Search allows you to search by Lender Loan Number or Document File ID directly from the Home Page.

#### 1.7 Recently Viewed Files

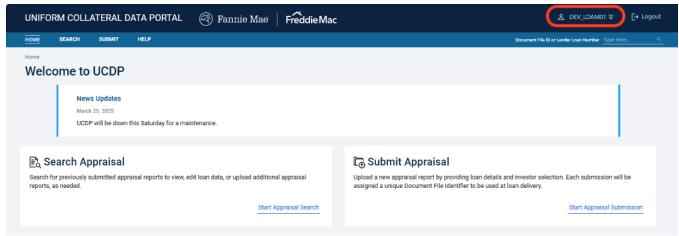


**Recently Viewed Files** makes it easier to jump back into your recently accessed files easier. The section displays up to five of the user's recently viewed files, in descending order based on when the file was last viewed.

#### **Refreshed User Preference and Account Self Care**

Clicking on the **User Profile** in the top section of the header reveals a drop-down menu that allows users to make changes to their UCDP landing page, personal details, password, or challenge response questions.

#### 1.8 User Profile Drop-Down Location

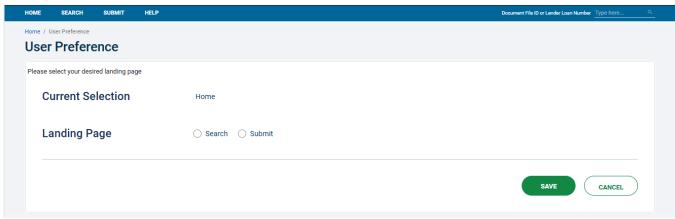


#### 1.9 User Profile Drop-Down Menu



The *User Preference Page* allows the user to select their preferred landing page.

#### 1.10 User Preference Page



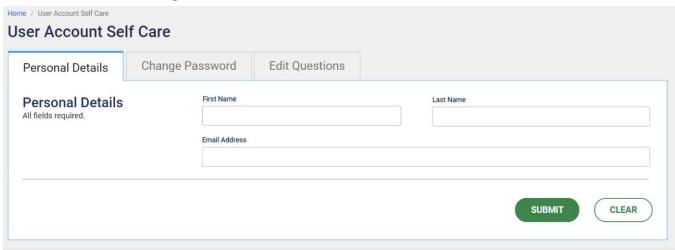
- All users start with the *Home Page* as the default **Current Selection**.
- You can change the Landing Page to either the Search Page or the Submit Appraisal Page.
  - o To update your Landing Page, select the radio button next to the desired landing page and click Save.
  - After successfully changing the Landing Page, you will see the new selection as the Current Selection and the other two pages listed as available radio buttons next to Landing Page.

The User Account Self Care Page offers three options that allow the user to manage account details, including:

- 1.11 Personal Details
- 1.12 Change Password
- 1.13 Edit Questions

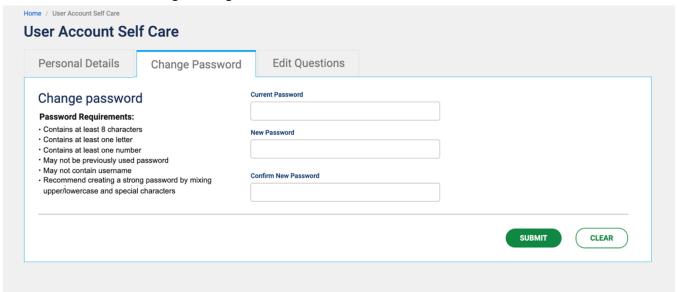
The Personal Details tab is where you can update your preferred first name, last name, and email address.

#### 1.11 User Account Self Care Page - Personal Details



The **Change Password** tab is where you can update your current password. A list of password requirements is provided to help you create a strong password.

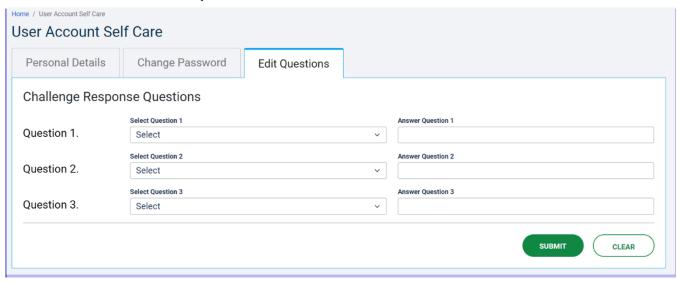
#### 1.12 User Account Self Care Page - Change Password



**NOTE:** To reset your password, you can use the <u>Forgot your Password?</u> function from the "Login Page" or contact your UCDP Admin. If you don't know your UCDP Admin, contact the UCDP Support Center at (800) 917-9291.

The **Edit Questions** tab is where you can update your selected **Challenge Response Questions**. This is a list of authentication questions set up during your initial registration to UCDP, which you can use to reset your password yourself. The system will authenticate you as the intended user based on your answers documented in this page. Be sure to check your spelling and use a minimum of 3 characters for each answer.

#### 1.13 User Account Self Care - Edit Questions



To change or update your **Challenge Response Questions** and/or Answers:

- 1. Starting with **Question 1**, click the drop-down to select from several preset questions.
- 2. Enter your answer to each challenge questions in the corresponding text box.
- 3. Once all three questions and answers are completed, click **Submit.**

## Where do I find...

#### 1. Where are the Share Appraisal tab and icon?

The **Share Appraisal** navigation tab and drop-down options for **Share Appraisals** and **Retrieve Appraisals** and the **Share Appraisal** icon that appeared on the *Home Page* for these specific roles will be retired on June 14, 2025. Users with Lender CorrAgg or Correspondent Agent user roles can no longer navigate to or access specific Share Appraisal pages within the UCDP UI.

#### 2. Where is the Account Administration drop down?

The former **Account Administration** menu which included the **User Profile** and **Account Self-Care drop-down options** has been removed. The **User Profile** and **Account Self-Care** drop-down options are now available when you click on your **User Profile** name on the top right corner above the Navigation Bar.

#### 3. Where is the Reports tab?

The **Reports tab** has been removed due to infrequent use and in alignment with our ongoing efforts to improve and streamline our services.

**NOTE:** See Frequently Asked Questions section for a full list of questions.

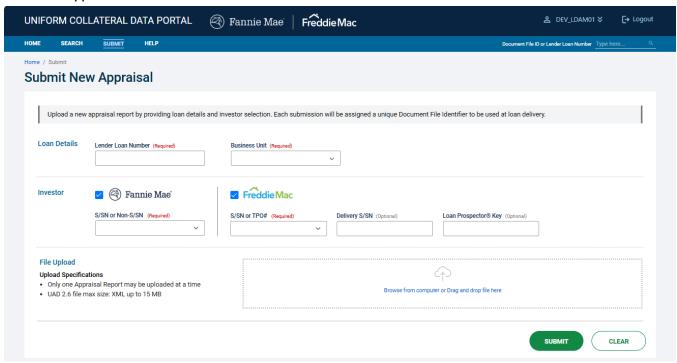
## **Section 2: Submit Appraisal**

#### **Streamlined Submit Appraisal Page**

The Submit Appraisal Page allows users to submit a new appraisal report, one file at a time. The user must enter all required fields and attach a valid UAD 2.6 XML file to successfully submit. Every submission through this page generates a unique Document File ID (Doc File ID) that is associated with that appraisal report through loan delivery.

**NOTE:** To submit a revised appraisal report file with an existing Doc File ID, you must first search for that record and submit through the "Appraisal View/Edit Page."

#### 2.1 Submit Appraisal



#### **Loan Details**

- Free-form text field to enter the Lender Loan Number associated with this loan. Required.
- Select the **Business Unit** from the drop-down. Required.

#### **Investor Details**

- This section shows the investors you selected at registration. Only one GSE name will appear if you are registered to one investor.
  - Checkboxes are checked by default and appear next to the corresponding GSE's name.
    - At least one checkbox must be checked to make a submission.
    - Unchecking a box means you do not wish to submit the file to that GSE.

- Fill in the S/SN or Non-S/SN (Seller Servicer Number or Non-Seller Servicer) field for Fannie Mae or S/SN or TPO# (Seller Servicing Number or Third-Party Originator Number) field for Freddie Mac using the drop-down.
  If only one associated number exists, it will be prepopulated. Required.
- o Freddie Mac optional fields:
  - Delivery S/SN
  - Loan Prospector Key

**NOTE:** Contact your Lender Admin to register a second investor.

#### **File Upload**

- The **File Upload** box allows you to **browse** and select a file from your device or drag a selected file from your device and drop it directly into the box to upload.
- Only one file can be selected.
- The system confirms file selection by displaying the file name, format, and size.
  - o If the file is not correct, delete the file by clicking on the **red trash bin** icon at the right of the file information and start the file upload process again.

Once the correct file is selected, click **Submit** or **Clear** buttons at the bottom right to process your desired next step.

- Clicking **Submit** will submit the file to the UCDP.
  - o Upon successful submission, UCDP generates a unique Doc File ID.
  - The user will be redirected to the Appraisal View/Edit page to view submission details about the file (Successful, Not Successful, or In Progress), as well as other submission information, appraisal information, and history of the submission
- Clear will reset all the fields on the page and clear the file upload box.
  - When you click **Clear**, a pop-up will warn you that you will lose all data entered.
    - Click Confirm Clear to confirm page reset, or
    - Click Cancel to go back without resetting the page.

# Q Where do I find...

#### 1. Where is the Upload Confirmation Report?

To streamline navigation within UCDP, the *Upload Confirmation Report Page* will no longer be displayed. Previously, this report page displayed after a UCDP submission. Going forward, after you submit a new appraisal report, the system will process the submission and display a progress bar. You will then be directed to the *Appraisal View/Edit Page* to access the status of the submission (Successful, Not Successful, or In Progress), as well as other submission information, appraisal information, and history of the submission.

# 2. Can I submit multiple loan appraisal reports or appraisal report document types at a time through the Submit Appraisal page?

The simplified *Submit Appraisal Page* allows one file submission at a time. This will help organize and manage appraisal report loan submissions under one Doc File ID. Each submission through this page will generate a unique Doc File ID that can be traced through loan delivery.

To add appraisal report data files to an existing loan (e.g., related secondary and tertiary appraisal reports, and corresponding Appraisal Update and Completion reports), submit the additional files in the *Appraisal View/Edit Page* to capture all results through one consolidated SSR.

#### 3. Where are the optional Fannie Mae Case File ID and Institution ID fields?

On June 14, 2025, these fields will be removed from the Fannie Mae section of the *Submit Appraisal* page. The fields will continue to be available through Direct Integration (DI) submissions for UAD 2.6 appraisal report files until UAD 2.6 is no longer supported in UCDP.

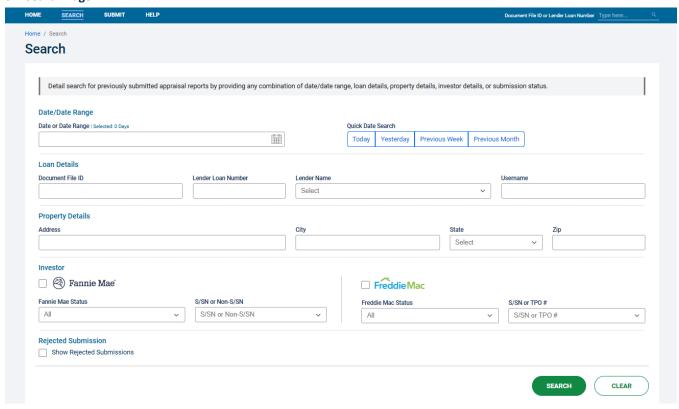
**NOTE:** See Frequently Asked Questions section for a full list of questions.

## **Section 3: Search Appraisal**

#### **Re-organized Search Page**

The new *Search Appraisal page* allows you to search for previously submitted appraisal reports by date, loan information, property details, investor details, and/or submission status.

#### 3.1 Search Page



**NOTE:** All fields on this page are optional; however you must enter at least one search parameter to return results.

#### **Date / Date Range selection**

- Date Picker: Allows you to visually select date range, up to one year old.
- Quick Date Search: Pre-selected date range buttons that immediately execute search.

#### **Loan Details**

- Returns appraisal reports tied to the specified Document File ID or Lender Loan Number.
- Returns appraisal reports associated with the specified **Lender Name** selected. *Depending on the role, this may appear as a drop down or text field.*
- Returns appraisal reports created or uploaded by the specified Username.

#### **Property Details**

- Returns appraisal reports associated with the specified Address, City, State, or Zip Code.
  - o Address line can include the street number, direction, street name, and unit number.
  - o **Zip Code** must be 5 digits.

#### **Investor Details**

- This section shows the investors you selected at registration.
  - **Checkboxes** next to the GSE's name, when checked, filter records for that GSE. If not checked, the search results will return any submission regardless of investor.
  - The Status drop-down will return records from that GSE with the corresponding status selected: Successful, Not Successful, or In Progress.
  - Search results will return records submitted under the specified S/SN or Non-S/SN from Fannie Mae or TPO# from Freddie Mac.

**NOTE:** Contact your Lender Admin to register a second investor.

#### Rejected Submission

 When checked, the search results return only rejected submissions. This may include, for example, a duplicate submission for the same Business Unit and Lender Loan Number. Rejected submissions will not be assigned a Doc File ID and will not add or change any existing submission in the system.

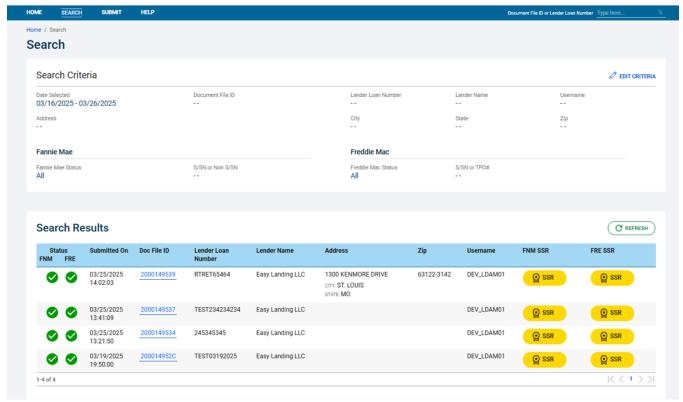
Once you've selected your search criteria, click the **Submit** or **Clear** buttons at the bottom right to process your desired next step.

- **Search** will perform the search with the parameters provided.
- Clear will reset all the fields on the page.

#### **Simplified Search Results**

If there are records that match the search parameters provided, your search results will populate below the Search Criteria.

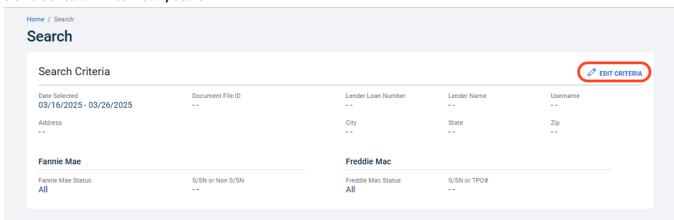
#### 3.2 Appraisal Search Form with Search Results



The **Search Criteria** will display the parameters used for the corresponding results. You can modify the search criteria by clicking the **Edit Criteria** link at the top right corner of the page. The page will become editable, and you can update as necessary.

NOTE: The Search Results from the preceding search parameters will continue to display until you run a new search.

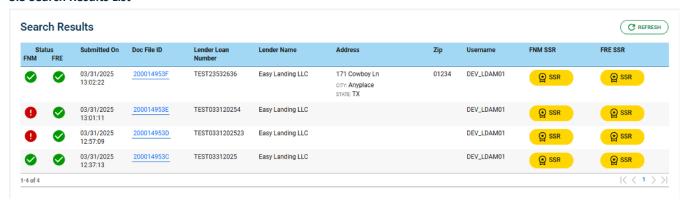
#### 3.3 Edit Criteria link to Modify Search



The **Search Results** will return: GSE Status, submission date to UCDP Doc File ID, Lender Loan Number, Lender Name, Address, Zip, Username and a button to access to each GSE's SSR.

- **Doc File ID** will link to the *Appraisal View/Edit Page*.
- A **Submission Summary Report (SSR)** button will display under the corresponding GSE column, FNM (Fannie Mae) SSR or FRE (Freddie Mac) SSR. Users will be able to download the SSR as a PDF directly from the **Search Results**.
- Users can run a real-time refresh by clicking the **Refresh** button at the top right of the **Search Results** section.

#### 3.3 Search Results List



The **Search Results** have been simplified with no collapse/expand options; however, users can still access all the information from the expanded list view by navigating to the *Appraisal View/Edit page*.

## Where do I find...

1. Where are the Appraisal Report PDF and Standard Data View (SDV) from the search results? For all UAD 2.6 submissions, you can view those files from the *Appraisal View/Edit Page*.

**NOTE:** See Frequently Asked Questions section for a full list of questions.

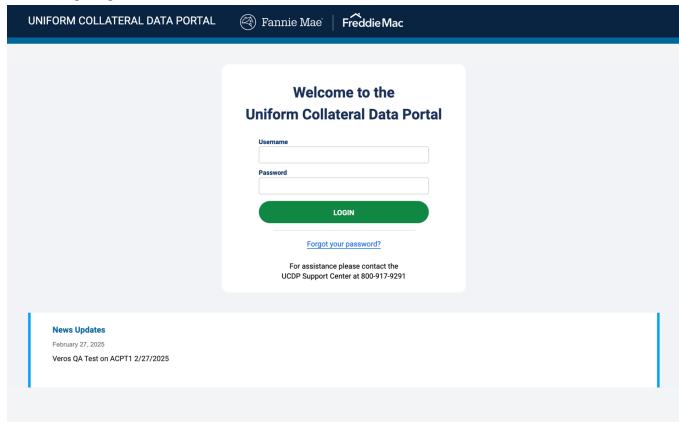
## **Section 4: New User Registration**

#### **Modernized Registration Webpages for Users Created in UCDP**

When your Lender Admin creates your account, you will receive a UCDP system-generated email informing you that your account has been created. This email includes your permanent username.

Your Lender Admin will also assign you a temporary password, which will be provided to you outside of the UCDP system-generated email. When you receive the email, click the hyperlink to access the UCDP Login Page. Log in to UCDP using the username in the "UCDP New User Account Information" email and the temporary password provided by your organization's Lender Admin.

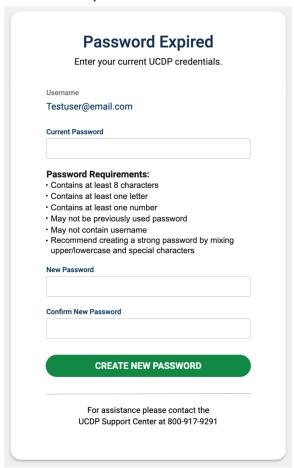
#### 4.1 UCDP Login Page



**NOTE:** Bookmark the login page so you can easily find it in the future.

After you log in, you'll be navigated to the *Password Expired Page* so you can change your temporary password to a permanent password.

#### 4.2 Password Expired



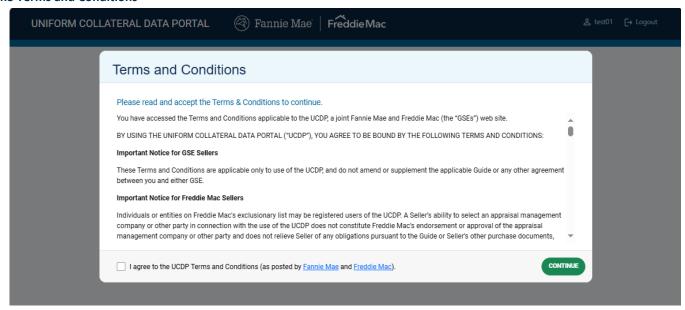
Passwords requirements are provided to help you set a strong password. If minimum requirements are not met, you will receive an error message specifying the requirement that was not met. On successful password change, a confirmation modal box will be displayed, and you will receive an email confirmation that your password has been changed.

When you log back in to UCDP, the system will navigate you through the following steps to finalize your registration:

#### Terms and Conditions:

- o A modal with the Terms and Conditions will appear.
- o Scroll down the modal to read through and accept the Terms and Conditions.
- o You must check the box at the bottom to continue to the next step, otherwise an error message will appear.

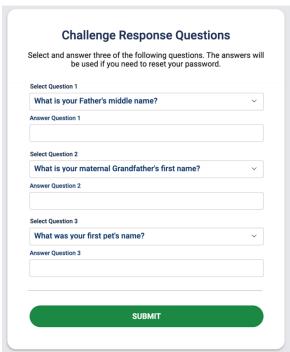
#### 4.3 Terms and Conditions



#### Challenge Response Questions:

- Select three separate questions from the six provided in the drop-down.
- o Enter an answer for each question. Note: Answers must contain at least 3 characters.
- Click Submit to register the questions and answers in the system.

### **4.4 Terms and Conditions**



After you submit the questions and answers, the UCDP Home Page appears, and you can begin using UCDP.

#### **Modernized Registration Webpages for Users Invited to UCDP**

When your Lender Admin invites you to create an account in UCDP, you'll receive a UCDP system-generated email. When you receive the email, click the hyperlink to access the Self Registration Page.

#### 4.5 Self-Registration Page

## Complete your Self-Registration Email Address mxcz@veros.com Lender Admin Last Name demoenforcer2 Preferred Username Confirm Preferred Username **Password Requirements:** · Contains at least 8 characters · Contains at least one letter · Contains at least one number • May not contain username Recommend creating a strong password by mixing upper/lowercase and special characters CREATE **CLEAR**

Fill out all username and password fields to complete self-registration:

- Preferred Username and Confirm Preferred Username
- Password and Confirm Password

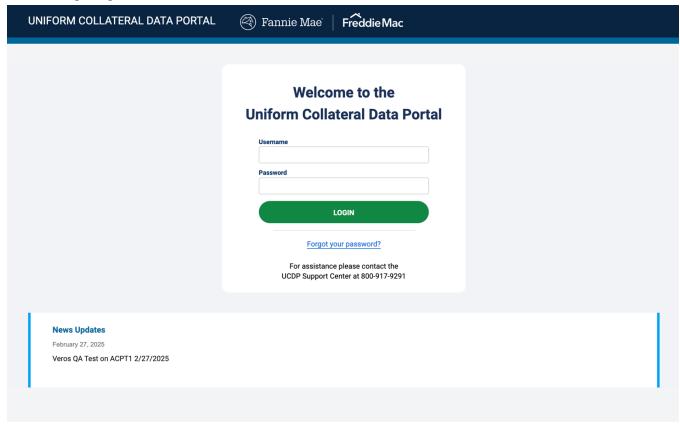
**NOTE:** Passwords requirements are provided to help you set strong passwords. If minimum requirements are not met, you will receive an error message specifying the requirement that was not met.

The **Create** and **Clear** buttons at the bottom will proceed to next step.

- Create will finalize creation of the new user account with the parameters provided.
- Clear will reset all the fields on the page.

Once the new user is created successfully, you'll receive a "Success" confirmation message with an option to "Return to Login," which will log you out of the system and return you to the UCDP Login Page. To log back in, you'll need to open the UCDP system-generated email and click the link, which will validate your registration information and returns you to the UCDP Login Page.

#### 4.6 UCDP Login Page



You can now log in to UCDP using your newly created user ID and password.

The first time you log in to UCDP, the system directs you to the *Terms and Conditions Page*.

To finish the login process, you must:

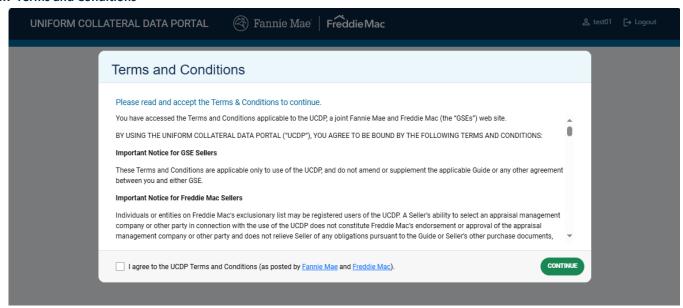
- Read and accept the Terms and Conditions.
- Select three Challenge Response Questions which will be used if your password needs to be reset.

When you log back in to UCDP, the system will navigate you through the following steps to finalize your registration:

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- o A modal with the Terms and Conditions will appear.
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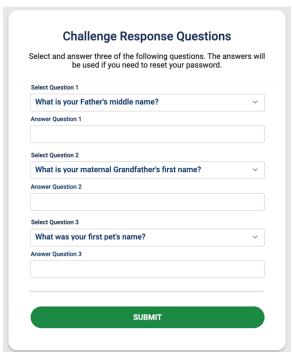
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- Select three questions from the six provided in the drop-down.
- o Enter an answer for each question. Note: Answers must contain at least 3 characters.
- Click Submit to register the questions and answers in the system.

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After you submit the questions and answers, the UCDP Home Page will appear and you can begin using UCDP.

# **Frequently Asked Questions**

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#### 1. Where are the Share Appraisal tab and icon?

The Share Appraisal navigation tab and drop-down options for Share Appraisals and Retrieve Appraisals and the Share Appraisal icon that appeared on the *Home Page* for these specific roles will be retired on June 14, 2025. Users with Lender CorrAgg or Correspondent Agent user roles can no longer navigate to or access specific Share Appraisal pages within the UCDP UI.

Lender CorrAgg Users and Agent Correspondent users will still have access to UCDP as Lender User and Agent Users, respectively. The equivalent roles will allow you the functionalities listed below.

Functionality	Lender CorrAgg User	Lender User
Submit appraisal data files	Yes	Yes
Search for appraisal data files	Yes	Yes
Upload corrected appraisal data files	Yes	Yes
Change your own user profile	Yes	Yes
Complete user account self-care tasks	Yes	Yes
Share (designate) appraisals with Aggregators	Retired	No
Search for previously shared (designated) appraisal files	Retired	No
Aggregator views and access to shared appraisals	Retired	No

Functionality	Agent Correspondent User	Lender Agent User
Submit appraisal data files	Yes	Yes
Search for appraisal data files	Yes	Yes
Upload corrected appraisal data files	Yes	Yes
Change your own user profile	Yes	Yes
Complete user account self-care tasks	Yes	Yes
Share (designate) appraisals with Aggregators	Retired	No
Search for previously shared (designated) appraisal files	Retired	No

#### 2. Will Appraisal Share features still be available in the UCDP Direct Integration (DI)?

UCDP Direct Integration (DI) users will continue to be able to share and retrieve appraisals through the DI interface. Correspondent lenders can share the results of the appraisal submission using the Doc File ID and Aggregator Identifier. Aggregators, in addition to retrieving status, findings, and SSR through the DI, will maintain the ability to set up and modify their Aggregator Set-up through the **Account Administration** drop-down in the UCDP UI.

#### 3. Where is the Account Administration drop down?

The former **Account Administration** menu for **User Profile** and **Account Self-Care** is now housed in the drop down that appears when you click on your username on the top right corner above the Navigation Bar.

#### 4. Where is the Reports tab?

The **Reports tab** has been removed due to infrequent use and in alignment with our ongoing efforts to improve and streamline our services.

#### 5. Where is the Upload Confirmation Report?

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#### 6. Can I submit multiple appraisal report document types at a time through the Submit Appraisal page?

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#### 7. Where are the optional Fannie Mae Case File ID and Institution ID fields?

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#### 8. Where are the Appraisal Report PDF and Standard Data View (SDV) from the search results?

For all UAD 2.6 submissions, you can view those files from the Appraisal View/Edit page.

#### 9. What will return as a rejected submission?

When the user submits an appraisal report, UCDP performs an initial validation check, which could result in a rejected submission (e.g., a duplicate submission for the same Business Unit and Lender Loan Number). Rejected submissions will not be assigned a Doc File ID and will not add or change any existing submission in the system.