

## UCDP Appraisal Sharing Job Aid for Correspondents

**Correspondent Lender Admin and Agent Admin:** Follow Step 1 to manage the user roles within the Uniform Collateral Data Portal® (UCDP®).

**Correspondent (Portal Only):** Follow Step 2 to select your aggregators.

**Correspondent (Individual Users):** Follow Step 3 for details on how to share appraisals with your aggregators.

Lender Role	Activity
<p><b>Correspondent Lender Admin and Agent Admin</b></p>	<p><b>Step 1: Review and Assign the UCDP Role</b></p> <p>In order to share appraisals with Aggregators, Correspondent Users need to have the appropriate UCDP role assigned. As the <b>Correspondent Lender Admin</b>, you are responsible for assigning the proper UCDP role to users in your organization. If you want your Lender Agent to share appraisals on your behalf, inform your <b>Agent Admin</b> to assign the proper UCDP role to the agent users.</p> <p>The following UCDP roles have access to ‘Share Appraisals’ functionality:</p> <ul style="list-style-type: none"> <li>• <b>For Lenders:</b> <i>Lender Admin</i> or <i>Lender CorrAgg User</i></li> <li>• <b>For Lender Agents:</b> <i>Agent Admin</i> or <i>Agent Correspondent User</i></li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• The <i>Lender CorrAgg User</i> has the same privileges as a <i>Lender User</i> with the added ability to share and retrieve appraisals.</li> <li>• The <i>Agent Correspondent User</i> has the same privileges as an <i>Agent User</i> with the added ability to share appraisals.</li> </ul> <p>For Lenders, refer to <a href="#">Uniform Collateral Data Portal Reference Series for the Lender Admin: 3 - Managing Users</a> for step-by-step instructions on how to assign or change a lender user’s role.</p> <p>For Lender Agents, refer to <a href="#">Uniform Collateral Data Portal Lender Agent Admin User Guide</a> for step-by-step instructions on how to assign or change an agent user’s role.</p> <p>For the <b>UCDP Direct Integration (DI)</b> solution, you must use the <b>DI Lender</b> or <b>DI Lender Agent</b> role to share appraisals with your aggregators.</p>
<p><b>Correspondent (Portal User Only)</b></p>	<p><b>Step 2: Select Your Aggregators</b></p> <p>In order to share appraisals within the UCDP web portal, the individual Correspondent User or the Correspondent Lender Agent user must select the aggregator(s) with whom they will choose to share appraisals.</p> <p>From the <b>UCDP Home</b> page, click the <b>Account Administration</b> tab and select <b>User Profile</b>.</p> <p>Select the aggregator(s) from the <b>Available Aggregators</b> list and click the “Add &gt;” to update the <b>Selected Aggregators</b> box on the right.</p> <p>Refer to <a href="#">Uniform Collateral Data Portal Appraisal Sharing User Guide</a> for step-by-step instructions on how to select your aggregators.</p>

	<p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• This step is required for the individual UCDP web user who wants to share appraisals. The Aggregator selection is not needed for DI users.</li> <li>• In order to select your aggregators, your aggregators must have completed the required aggregator profile set-up within the UCDP.</li> </ul>
<p><b>Correspondent (Individual User)</b></p>	<p><b>Step 3: Share Appraisals with Your Aggregators</b></p> <p><b><u>UCDP Web Solution:</u></b></p> <p>From the Home page, click on the <b>Share Appraisal</b> icon or navigate to the <b>Share Appraisal</b> tab and select <b>Share Appraisals</b> from the drop-down to view the <b>Share Appraisals or Search Previously Shared Appraisals</b> page.</p> <p>Enter parameters to search submitted appraisals and share appraisals with your selected aggregator(s).</p> <p>Refer to <a href="#">Uniform Collateral Data Portal Appraisal Sharing User Guide</a> for step-by-step instructions on sharing appraisals.</p> <p><b><u>UCDP DI Solution:</u></b></p> <ul style="list-style-type: none"> <li>• Execute the <b>MakeDesignation</b> DI call by providing a Doc File ID and an Aggregator ID.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• The Aggregator ID is created by UCDP when the aggregator Lender Admin completes the required one-time aggregator set-up.</li> <li>• The registered aggregators (including Aggregator Name, Aggregator ID) will be displayed in the '<b>Available Aggregators</b>' list of the <b>UCDP Account Administration -&gt; User Profile page</b>.</li> <li>• Contact the joint UCDP Support Center at 1-800-917-9291 if you have further questions on the Aggregator ID.</li> </ul>