






# Uniform Closing Dataset (UCD) Implementation Quick Sheet

## 2016 UCD Implementation Calendar

Q1	Q2	Q3	Q4
	★ B2B Integration Spec available	★ <b>September 2, 2016</b> UCD collection solution available (user interface or direct integration)	★ Lenders should begin implementing UCD file in internal systems ( <i>Target</i> )
Build awareness and begin planning for UCD		Voluntary submission / testing of UCD file	
Lender UCD data requirements analysis			
TSP early validation testing and integration for UCD file development			Begin UCD file submission planning (before delivery) for all channels including correspondent, if applicable

## Important Steps to Take Starting Now

 TRAINING	 ANALYSIS	 IMPLEMENTATION
<ul style="list-style-type: none"> <li>❑ <b>Attended live webinars:</b> <i>UCD Collection Solution User Training and Demo</i></li> <li>❑ <b>Review key resources</b> on the FannieMae.com UCD page:             <ul style="list-style-type: none"> <li>❑ UCD User Guide</li> <li>❑ Quick Guides</li> <li>❑ UCD Presentation (<i>self-paced eLearning</i>)</li> <li>❑ Fact Sheets and FAQs</li> </ul> </li> <li>❑ <b>Bookmark the UCD Page:</b> <a href="http://www.fanniemae.com/singlefamily/uniform-closing-dataset">www.fanniemae.com/singlefamily/uniform-closing-dataset</a></li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Analyze the data</b> needed for the UCD file:             <ul style="list-style-type: none"> <li>❑ Qualified Mortgage (QM) data points</li> <li>❑ Casefile Identifier</li> <li>❑ Split Disclosure – does your system store the Seller Closing Disclosure?</li> </ul> </li> <li>❑ Implement <b>alternate form</b> (for refinances)</li> <li>❑ Establish a process for <b>embedding the Closing Disclosure PDF(s)</b> (<i>signatures not required</i>)</li> <li>❑ Determine <b>how to collect</b> Seller data and Closing Disclosure</li> <li>❑ Determine your <b>correspondent process</b> (<i>If applicable</i>)</li> </ul>	<ul style="list-style-type: none"> <li>❑ Establish an <b>internal work group</b> to lead UCD effort and coordinate with Technology Solution Provider (TSP) and Fannie Mae representatives</li> <li>❑ Work with TSP or internal technology team to understand their <b>UCD file implementation timeline</b></li> <li>❑ Determine whether you will upload UCD file via the <b>user interface or direct integration</b>.</li> <li>❑ Assess <b>what point in your process</b> you will upload the UCD file to obtain eligibility and data messaging</li> <li>❑ Determine how your <b>correspondents</b> will submit the UCD file (<i>If applicable</i>)</li> </ul>