Technology Manager Administrator Registration Job Aid

Instructions for completing the Technology Manager Registration online Request Form. For further assistance contact the Technology Service Center at 800-2FANNIE (232-6643), or your Fannie Mae representative.

Overview

This process to provide a Corporate Administrator (CA) or User Administrator (UA) permissions for Technology Manager starts with completing the online Technology Manager Administrator Registration request. Authorized representatives from your organization may request a new or update to an existing CA or UA role. By submitting the request, the authorized representative is agreeing to be responsible for any actions taken by the administrator through Technology Manager and to periodically review the status of each Administrator.

Completing the Administrator Registration Request Form

A single red asterisk (*) indicates a required field. Double red asterisks (**) indicates a field required for a New User. The applications available for an administrator to manage within Technology Manager will differ based on your customer type.

1. From the **Customer Type** drop down menu, select the **customer type** that best describes the activity that your company performs:

   b. **Multifamily Lender** - Fannie Mae-approved Seller/Servicer for Multifamily.
   c. **Collateral Underwriter (CU) Only** – UCDP - Only correspondent that has already elected to register for Collateral Underwriter.
   d. **Disbursement Agent Management** – (a.k.a. Security Settlement Agent) – Third party that settles MBS Securities on behalf of warehouse lenders that hold a third party interest in a loan or pool of loans.
   e. **Warehouse Lender Management** – Company that extends short-term lines of credit to mortgage loan originators for the funding of mortgage loans.
   f. **Mortgage Originator** - Broker sponsored by a Fannie Mae-approved lender to use Desktop Originator (DO).
   g. **Real Estate Owned (REO) Vendor** - Fannie Mae-approved vendor for REO properties.
   h. **Credit Reporting Agency (CRA)** – An agency that collects individual credit information so financing companies can make a decision on granting loans.
   i. **Home Counselor (HCO)** - Agency that provide home buyer education to prospective borrowers.
   j. **Mortgage Insurer** - Fannie Mae-approved mortgage insurer.
   k. **Housing Finance Agency (HFA) - Indirect** - Authority established to help meet the affordable housing needs and community development programs but do not deliver directly to the GSEs.
   l. **Custodian** - Fannie Mae-approved institution that provide document custody services on behalf of Fannie Mae and an approved seller/servicer.
NOTE: There are three individuals involved in submitting this request:

The Requestor is the individual who is submitting the form and will receive notification and status of the request.

The Administrator is the individual who is receiving administration access to Technology Manager.

The Authorized Representative is the individual whose name should be entered in the authorization section and is agreeing to the legal language.

2. In the Requestor Identification section, complete the following fields:

- **Name:** Enter the first name and last name of the individual who is submitting the request. This individual will receive status updates and will be contacted if there are any issues with the request.

- **E-mail:** Enter the E-mail of the individual submitting the request. This E-mail address will be used to send initial E-mail confirmations of the request receipt and a subsequent E-mail confirmation when the request is completed.

- **Phone:** Enter the requester's phone number. Enter just the number, dashes will be inserted automatically.

3. For the Desired Administrator Type, select the corresponding radio button next to either the Corporate Administrator or User Administrator.

   - **Corporate Administrator** - Has the authority to manage all access to Fannie Mae technology for your company, including activating and configuring applications, managing user access, and managing lender-broker relationships, if applicable. This role is available to Fannie Mae seller/servicers only.

   Individuals designated as Corporate Administrators will have the ability to legally bind your company by signing and submitting requests and terms and conditions for technology applications until Fannie Mae receives a signed Administrator Registration Request directing that their status as a Corporate Administrator be terminated. Corporate Administrators will be the recipients of Bulletins to your company's Software Subscription Agreement with Fannie Mae.

   - **User Administrator** - Has the authority to set up and manage user profiles, passwords, and access to Fannie Mae technology applications. This role is for Fannie Mae Lenders and non-Lenders.

   NOTE: Some Customer Types will only have User Administrator availability.
4. Enter your **Company Information**, Company Name (Legal Name and dba, if applicable) and one of the following identifiers based on your Customer Type:

<table>
<thead>
<tr>
<th>Customer Type</th>
<th>Customer Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family Lender</td>
<td>Seller/Servicer Number (5-digit Number)</td>
</tr>
<tr>
<td>Multifamily Lender</td>
<td></td>
</tr>
<tr>
<td>CU Only</td>
<td>Non-Seller/Servicer Number (5-digit Number)</td>
</tr>
<tr>
<td>All Others</td>
<td>User Group ID (6-character alpha-numeric) a.k.a. Subscriber ID</td>
</tr>
</tbody>
</table>

5. **Registration Information.** Select one **User Type**:

- **New User ID** for a new Administrator ID. Skip Step 6 and proceed to Step 7.
- **Existing User ID** to update an existing ID. Complete the **Desired Action** section that appears and continue to Step 6.

**Desired Action:**
- Assign/update access privileges
- Delete all administrator privileges

Enter Existing User ID (8-character, i.e., a1234xyz): *

i. Select **Assign/update access privileges** if an existing ID needs to change what is managed by this Administrator. (For CAs, Seller/Servicer Numbers; For UAs, User Groups or Applications)

ii. Select **Delete all administrator privileges** if the administrator noted in the following section needs to have all administrator access removed from their ID.

**NOTE:** The ID will remain active, but be demoted to the access of an end user. If the user needs to be deleted completely, follow your existing access termination procedure.
6. Enter the following Administrator Information for the individual who is being setup or whose access is being modified. Those fields marked with (**) are required for a new user. These fields can be completed for an existing user if this information needs to be updated, but they are not required for an existing user.

![Administrator Information Table]

- **Administrator Name** – Enter the first and last name. This is a required field for both new and existing.
- **E-mail** – Enter the Administrator’s E-mail address. Password setup instructions will be sent to this E-mail address.
- **Phone** – Enter the Administrator’s Phone number. Enter just the number, dashes will be inserted automatically.
- **PIN** – Enter a unique 4-digit numeric PIN. This number should be unique to this individual.

7. Click the Next Button to continue.

**NOTE:** For Corporate Administrator Setup, continue to Step 8, skip Steps 9 and 10, proceed to step 11. For User Administrator Setup, skip Step 8, proceed to Step 9.

8. Complete the Corporate Administrator Setup. This section is to request to add and/or update Seller/Servicers Numbers that a Corporate Administrator manages. Check the Add or Remove box and enter up to six 5-digit Seller/Servicer Numbers.
9. Complete the **User Administrator Setup**. This section is to request to add and/or update User Groups that a User Administrator manages. Check the **Add or Remove box** and enter a 6-character alphanumeric **User Group ID** and the **User Group Name**. (User Group ID - a.k.a. Subscriber ID)

![User Administrator Setup](image)

10. Complete the **Application Setup** section. This section is to request to add and/or update applications that a User Administrator manages within the User Groups. Check the **Add or Remove box** next to the desired applications. The applications listed in this section correlates to the Customer Type which was selected at the top of the request.

![Application Setup](image)

11. Click the **Next Button** to continue to the **Review and Submit Page** (see the following page for an example).

12. Review this page for the information that was entered on the previous two pages. If there are any changes needed, click the **Edit Form** button at the bottom of the page, go back and make changes. When the form is accurately completed, scroll down to proceed to the signature.
13. At the bottom of the page, enter the **name and title of the authorized representative** who is agreeing to the legal language set forth in this request form.

14. Enter the **captcha letters and numbers** presented. Click the Refresh Captcha button to create a new Captcha option to enter.

15. Click the **Submit button** to submit the request.

**What to expect next:**

1. The Requester will receive an initial confirmation E-mail with the submitted information.
2. The Request will receive a second E-mail which contains a tracking number for this request indicating that the Technology Registration Team received and has started processing the request.
3. Within 3 business days the Requester will receive a notification that the request is completed.
4. If the request was for a new User ID, then the new administrator will receive an email to setup their new password.