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.

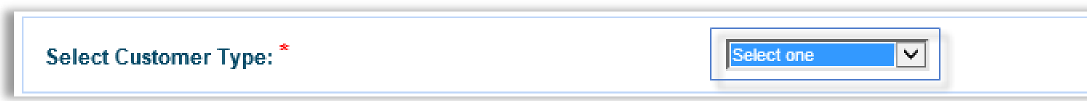
Overview

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:



a. **Single Family Lender** - Fannie Mae-approved Seller/Servicer for Single Family.
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:

Requestor Information

Name: * Mary Smith

E-mail: * mary.smith@onebank.com

Phone: 703-555-1234 Ext: 512

a. **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.

b. **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.

c. **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.

Desired Administrator Type:

○ **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.

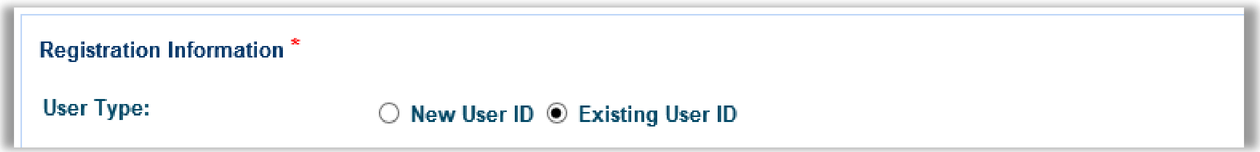
○ **User Administrator** - Has the authority to set up and manage user profiles, passwords, and access to Fannie Mae technology applications. This role is for Fannie Mae Lenders and non-Lenders.

NOTE: *Some Customer Types will only have **User Administrator** availability.*

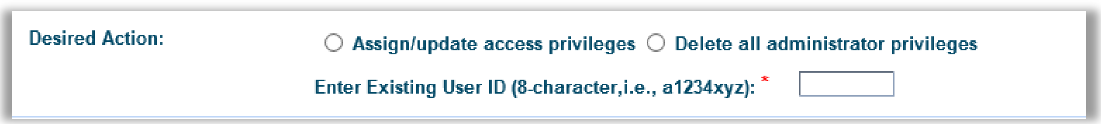
4. Enter your **Company Information**, Company Name (Legal Name and dba, if applicable) and one of the following identifiers based on your Customer Type:

Customer Type	Customer Identifier
• Single Family Lender • Multifamily Lender	Seller/Servicer Number (5-digit Number)
• CU Only	Non-Seller/Servicer Number (5-digit Number)
• All Others	User Group ID (6-character alpha-numeric) a.k.a. Subscriber ID

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.

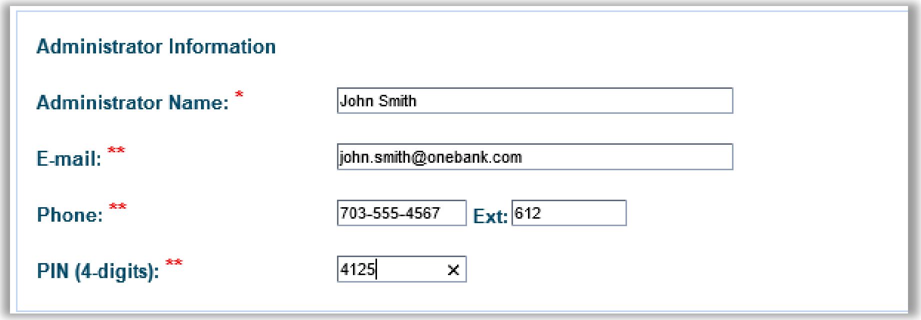


i. Select **Assign/update access privileges** if an existing ID needs to change what is managed by this Administrator. (For CAs, Seller/Servicer Numbers; For UAs, User Groups or Applications)

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.



a. **Administrator Name –** Enter the first and last name. This is a required field for both new and existing.

b. **E-mail –** Enter the **Administrator's E-mail address.** Password setup instructions will be sent to this E-mail address.

c. **Phone –** Enter the **Administrator's Phone number.** Enter just the number, dashes will be inserted automatically.

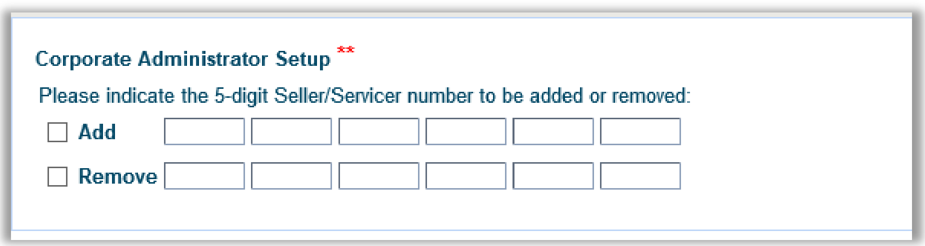
d. **PIN –** Enter a **unique 4-digit numeric PIN**. This number should be unique to this individual.

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)

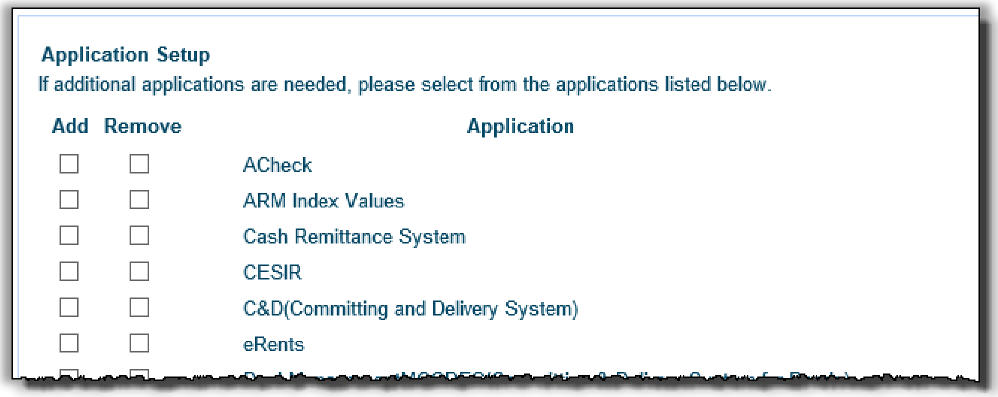
User Administrator Setup **

Please enter User Group ID, User Group Name, and select add or remove group: Select One:

Add Remove

☐ ☐ User Group ID: ** User Group Name: **

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.



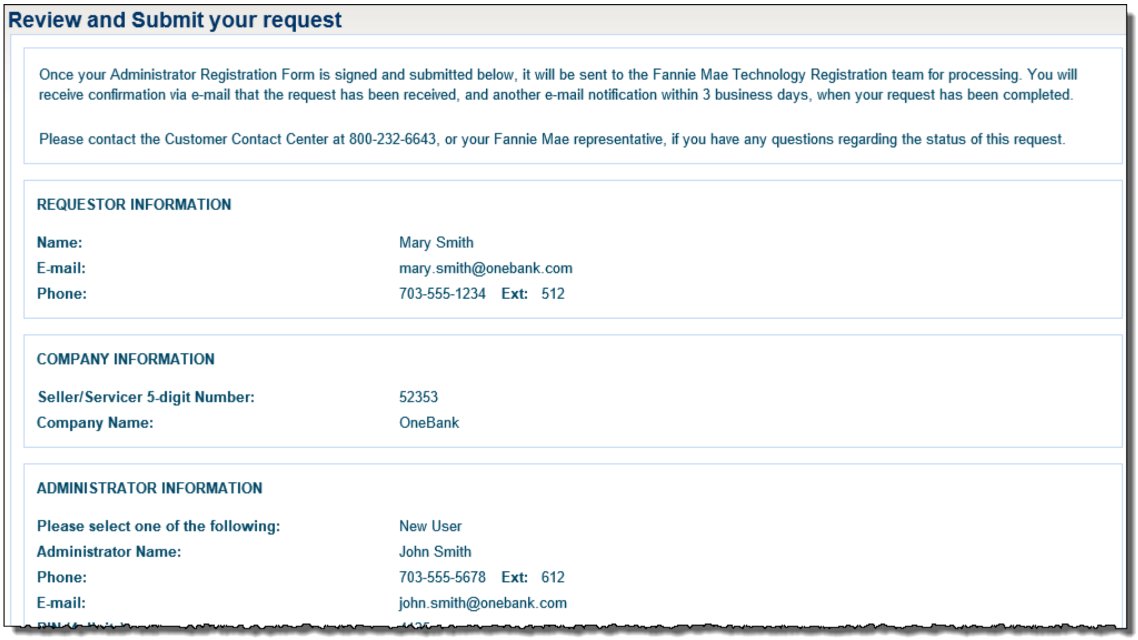
Application Setup

If additional applications are needed, please select from the applications listed below.

Add	Remove	Application
☐	☐	ACheck
☐	☐	ARM Index Values
☐	☐	Cash Remittance System
☐	☐	CESIR
☐	☐	C&D(Committing and Delivery System)
☐	☐	eRents

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.



Review and Submit your request

Once your Administrator Registration Form is signed and submitted below, it will be sent to the Fannie Mae Technology Registration team for processing. You will receive confirmation via e-mail that the request has been received, and another e-mail notification within 3 business days, when your request has been completed.

Please contact the Customer Contact Center at 800-232-6643, or your Fannie Mae representative, if you have any questions regarding the status of this request.

REQUESTOR INFORMATION

Name:	Mary Smith
E-mail:	mary.smith@onebank.com
Phone:	703-555-1234 **Ext:** 512

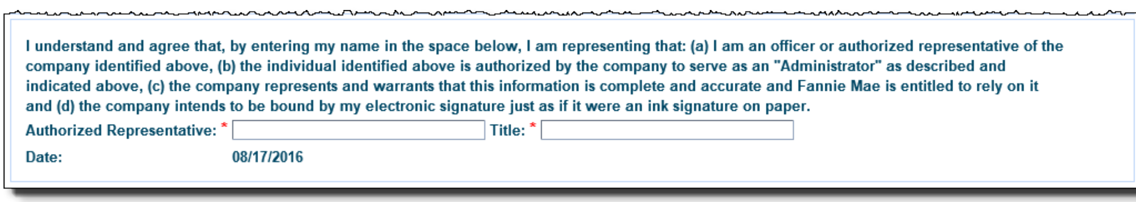
COMPANY INFORMATION

Seller/Servicer 5-digit Number:	52353
Company Name:	OneBank

ADMINISTRATOR INFORMATION

Please select one of the following:	New User
Administrator Name:	John Smith
Phone:	703-555-5678 **Ext:** 612
E-mail:	john.smith@onebank.com

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.



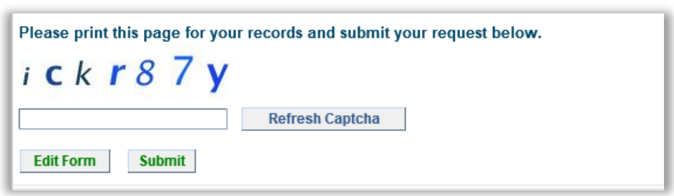
I understand and agree that, by entering my name in the space below, I am representing that: (a) I am an officer or authorized representative of the company identified above, (b) the individual identified above is authorized by the company to serve as an "Administrator" as described and indicated above, (c) the company represents and warrants that this information is complete and accurate and Fannie Mae is entitled to rely on it and (d) the company intends to be bound by my electronic signature just as if it were an ink signature on paper.

Authorized Representative: * Title: *

Date: 08/17/2016

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.



Please print this page for your records and submit your request below.

Refresh Captcha

Edit Form Submit

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.