

## UCDP Appraisal Sharing Job Aid for Aggregators

**Aggregator Lender Admin:** Follow Steps 1 and 2 to perform the required one-time aggregator set-up and manage user role set-up for your organization within the Uniform Collateral Data Portal® (UCDP®).

**Aggregator (Individual User):** Refer to Step 3 to retrieve correspondent-shared appraisals.

Lender Role	Activity
<p style="text-align: center;"><b>Aggregator Lender Admin</b></p>	<p><b>Step 1: Perform One-time Aggregator Set-up</b></p> <p>The <b>Aggregator Profile</b> set-up is the prerequisite step to begin receiving correspondent appraisals shared with your organization. As the <b>Aggregator Lender Admin</b>, you are responsible for creating and managing the aggregator profile for your organization within the UCDP web portal.</p> <p>From the <b>UCDP Home</b> page, click the <b>Account Administration</b> tab and select <b>User and Business Unit Administration</b>.</p> <p>Select your <b>UCDP Business Unit</b>, locate the <b>Aggregator Set up</b> section and fill out the required fields (<b>Aggregator Name, City, State, FNM S/SN (5-digit), FRE SSN</b>). You will be assigned a randomly generated Aggregator ID to share with your correspondent lenders once you have completed these steps.</p> <p>Refer to <a href="#">Uniform Collateral Data Portal Reference Series for the Lender Admin: 5 - Managing Aggregator Profile</a> for step-by-step instructions.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>Aggregators must access the UCDP web portal to set up the aggregator profile.</li> <li>S/SN drop-down lists: Please select the value based on the S/SN that you intend to use for your UCDP appraisal submissions. Please note: the FNM S/SN drop down will reflect only the first 5-digits of the S/SN.</li> <li>If you have multiple Seller/Servicer Numbers (S/SNs) listed and have questions on which one to use, contact your Fannie Mae customer account team or Freddie Mac representative.</li> <li>Be sure to communicate the newly created <b>Aggregator Name</b> and <b>Aggregator ID</b> to your correspondent lenders so they can begin sharing appraisals with your organization.</li> </ul>
	<p><b>Step 2: Review and Assign the UCDP role</b></p> <p>In order to retrieve correspondent-shared appraisals, aggregators must have the appropriate UCDP Role. As the <b>lender admin</b>, you are responsible for assigning one of the following UCDP roles to your user: <b>Lender Admin</b> or <b>Lender CorrAgg User</b>.</p> <p><b>Note:</b> The <i>Lender CorrAgg User</i> has the same privileges as a <i>Lender User</i> with the added appraisal sharing functionality.</p> <p>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 user's role in UCDP.</p> <p>To use the <b>UCDP Direct Integration (DI)</b> solution, your users must have the <b>DI Lender</b> role to successfully execute the appraisal sharing related DI services/calls.</p>

Lender Role	Activity
<p><b>Aggregator (Individual User)</b></p>	<p><b>Step 3: Retrieve Correspondent-shared Appraisals</b></p> <p><b><u>UCDP Web Solution:</u></b></p> <p>From the Home page, navigate to the <b>Share Appraisal</b> tab and select the <b>Retrieve Appraisals</b> from the drop-down to generate the <b>Retrieve Shared Appraisals</b> page.</p> <p>Enter the parameters to search for correspondent-shared appraisals and submit. Once the search results return, you may review the appraisal’s status, findings, Submission Summary Report (SSR), and PDF as needed.</p> <p>Refer to <a href="#">Uniform Collateral Data Portal Appraisal Sharing User Guide</a> for step-by-step instructions on retrieving correspondent-shared appraisals.</p> <p><b><u>UCDP DI Solution:</u></b></p> <ul style="list-style-type: none"> <li>• Execute the optional <b>GetDesignations</b> DI call to retrieve a list of Doc File IDs that have been designated to you within the prescribed date range.</li> <li>• Execute the <b>GetFindings</b>, <b>GetFindingsWait</b>, and <b>GetReports</b> DI calls to access the correspondent-shared appraisal’s status, findings, and SSR.</li> </ul>