

## Uniform Collateral Data Portal Reference Series for the Lender Admin: 4 - Managing Lender Agents

This reference is the fourth in a series of five references for the Lender Administrator, a Uniform Collateral Data Portal® (UCDP®) user who has authority to set up and manage the business structure within the portal, including the access privileges of other users. This user is known as the lender admin. The focus of this reference is on managing lender agents, which are third-party entities that a lender authorizes to perform functions within the UCDP, such as uploading appraisals, sharing appraisals, and evaluating results. The other references in this series include:

- [Series 1: Lender Admin Registration](#)
- [Series 2: Managing Business Units](#)
- [Series 3: Managing Users](#)
- [Series 5: Managing Aggregator Profile](#)

The topics covered in this reference include:

- [Managing Relationships with Lender Agents Overview](#)
- [Inviting a Lender Agent](#)
- [Assigning and Removing Seller Numbers](#)
- [Updating a Lender Agent Relationship](#)
- [Finding Additional Assistance](#)

## Managing Relationships with Lender Agents Overview

A lender agent is a third-party entity that a lender authorizes to perform functions within the UCDP, such as uploading appraisals, sharing appraisals, and evaluating results. As the lender admin, you are responsible for authorizing lender agents to perform these tasks on behalf of your organization. The appraisal data files submitted by a lender agent on behalf of your organization become part of your business unit structure and can be viewed by the lender and returned in lender-initiated searches and reports. Lenders may also take actions on these appraisal data files as if they had submitted them directly. Similarly, the appraisals shared by a lender agent on behalf of your organization can be searched via the appraisal sharing.

Lender agents must be authorized by both GSEs to be listed in the UCDP lender agent dropdown. Lender agents must complete the **UCDP Lender Agent Registration Form** on either Fannie Mae's website or Freddie Mac's website to request an account.

Once the lender agent completes the UCDP lender agent registration and account setup, their name appears in the lender agent dropdown on the **Relationships** page in the UCDP. From there, you can identify and select one or more lender agents to submit appraisals on your organization's behalf to the UCDP.

The **Relationships** page provides you, the lender admin, with functionality to manage your lender agent relationships. On this page, you may complete the following tasks:

Functionality	Description
<a href="#">Inviting a Lender Agent</a>	Enables you to invite a lender agent who is in the lender agent dropdown into an established business unit.
<a href="#">Assigning and Removing Seller Numbers</a>	Enables you to assign and remove Seller Numbers you want the lender agent to work under once the lender agent is invited.
<a href="#">Updating a Lender Agent Relationship</a>	Enables you to change the status of the relationship from active to inactive and vice versa.

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## Inviting a Lender Agent

This section covers how to initiate setting up a relationship with a lender agent. After you invite a lender agent to establish a relationship with your organization, the lender agent receives an email inviting them to submit appraisal data files on your organization's behalf. To become an active lender agent for your organization, the agent must log in to the UCDP and accept the invitation.

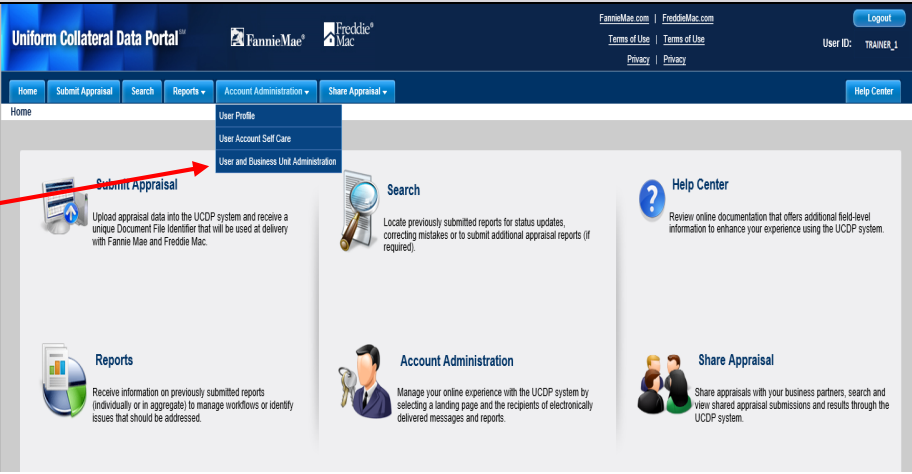
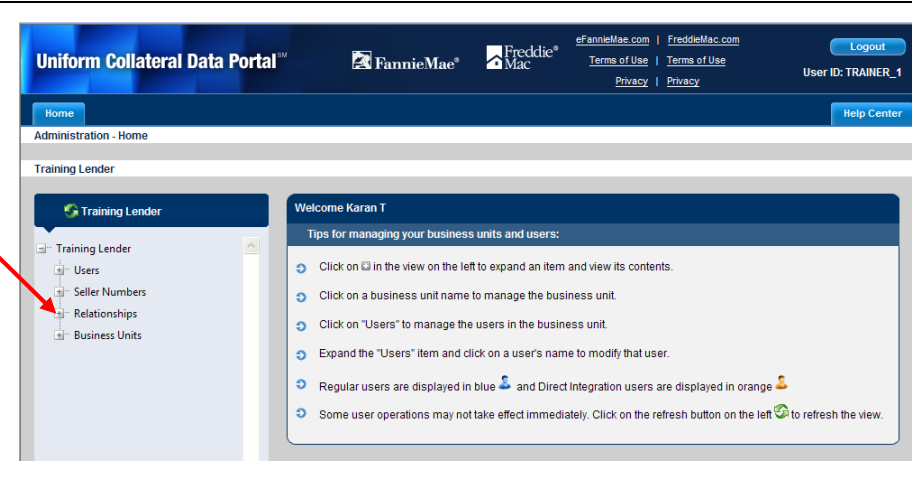
When inviting the lender agent, set the permission level to "Full":

With a permission level of "Full", the lender agent can perform all of the functions of a lender user, including submitting appraisals, viewing results, requesting overrides, searching for appraisals, scheduling and viewing reports, and viewing all findings related to appraisals submitted on your organization's behalf. This includes UAD Compliance Check messages, and in the future will include all proprietary GSE findings that may be delivered as part of the appraisal results through the UCDP. In addition, the lender agent may share appraisals submitted by the lender agent on behalf of the lender.

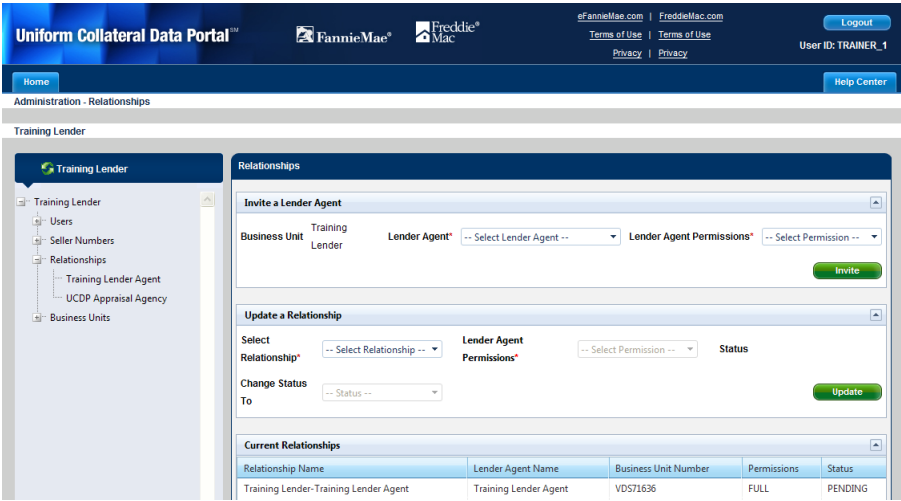
**Note:** The "Limited" lender agent permission level will be retired in the UCDP in the future and should no longer be used in the lender agent invitation.

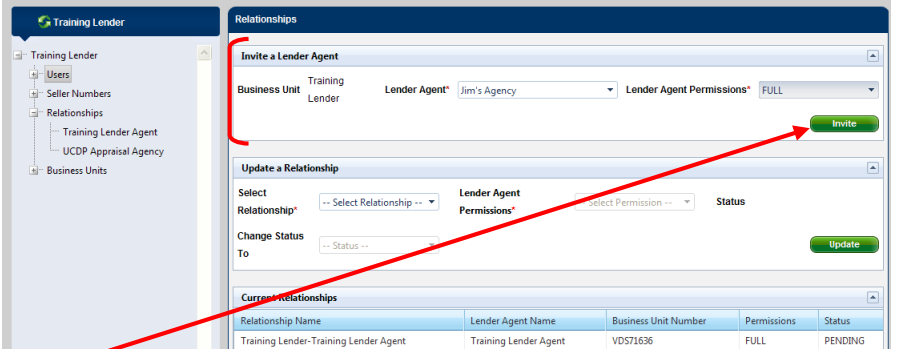
To invite a lender agent, follow these steps:

## Inviting a Lender Agent

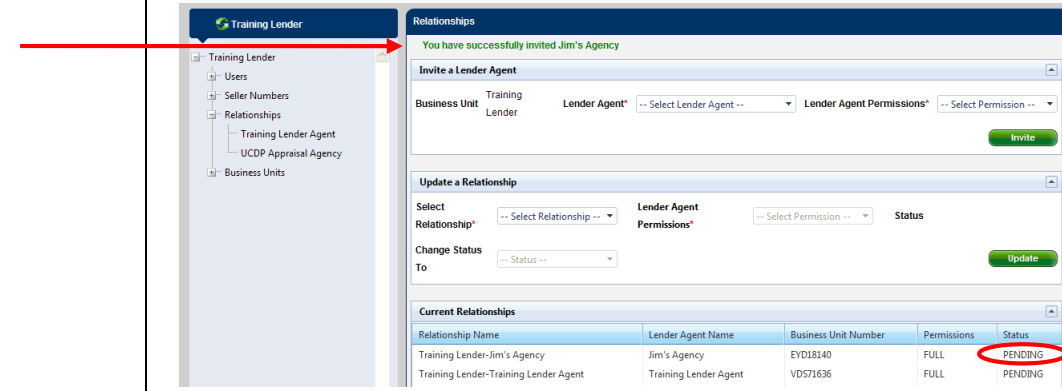

Step	Action / Result
<p>1. From the <b>UCDP Home</b> page, click the <b>Account Administration</b> tab and select <b>User and Business Unit Administration</b>.</p>	 <p>After you select <b>User and Business Unit Administration</b>, the <b>Administration - Home</b> page appears.</p>
<p>2. From the <b>Administration – Home</b> page, click <b>Relationships</b> in the left navigation bar.</p> <p>Click the <b>+</b> sign to display the list of lender agents associated with that business unit.</p>	

## Inviting a Lender Agent

Step	Action / Result
	<p>After you select <b>Relationships</b> from the left navigation bar, the <b>Administration - Relationships</b> page appears.</p> 
	<p>This page allows you to invite a lender agent to establish a relationship with your organization.</p>

<p>3. From the <b>Administration - Relationships</b> page, select the:</p> <ul style="list-style-type: none"> <li>▪ Lender agent you wish to invite from the <b>Lender Agent</b> dropdown.</li> <li>▪ Permission level (<b>full</b>) from the <b>Lender Agent Permissions</b> dropdown.</li> </ul> <p>Click <b>Invite</b>.</p>	
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## Inviting a Lender Agent

Step	Action / Result
	<p>After you click <b>Invite</b>, a <b>You have successfully invited [name of the lender agent]</b> message appears. The Current Relationships section shows a “Pending” status until the lender agent accepts or declines the relationship invitation.</p>  <p>The lender agent then receives an email invitation. If the lender agent accepts the invitation, the UCDP creates the relationship between your organization and the lender agent. The status in the Current Relationships section changes to “Active”.</p> <p> If the lender agent has not yet accepted the invitation, you can cancel the request by updating the lender agent’s status to “Inactive”. Refer to <a href="#">Updating a Lender Agent Relationship</a>.</p> <p>Even though the lender agent has been invited into a business unit that has active Seller Number(s), you must assign specific Seller Number(s) to enable the lender agent to submit appraisals on your organization’s behalf. This feature is in place to limit the exposure of your entire organization’s activity to the lender agent. Even with that business unit and Seller Numbers(s), the lender agent only has access to appraisal data files their organization submitted. Refer to <a href="#">Assigning and Removing Seller Numbers</a> for more information.</p>

## Assigning and Removing Seller Numbers

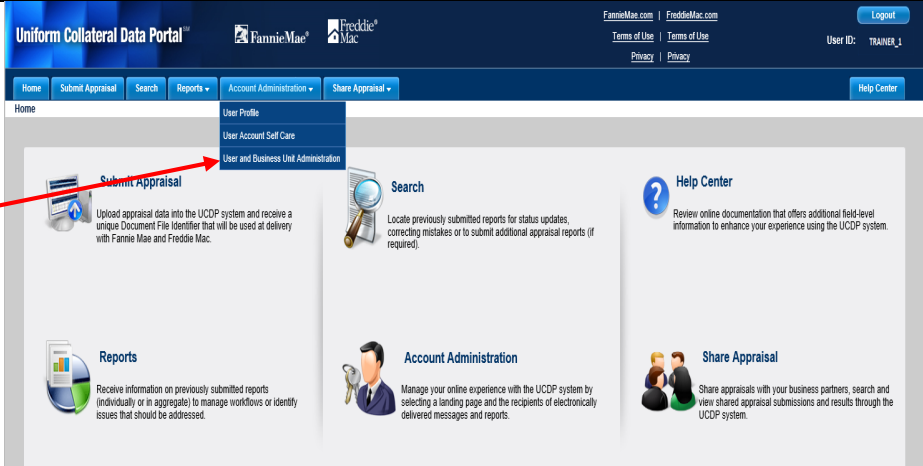
For the lender agent to submit appraisals on your organization's behalf, you must assign a Seller Number(s). For Fannie Mae, the Seller Number is your Seller/Service Number or Non-Seller/Service Number ID. For Freddie Mac, the Seller Number is your Seller/Service Number or Third Party Originator (TPO) Number.

You may assign a Seller Number(s) as soon as you invite the lender agent, even though the status may still be "Pending". Once a lender agent accepts the invitation and has an assigned Seller Number(s), the lender agent can begin submitting appraisals for your organization under the assigned Seller Number(s).


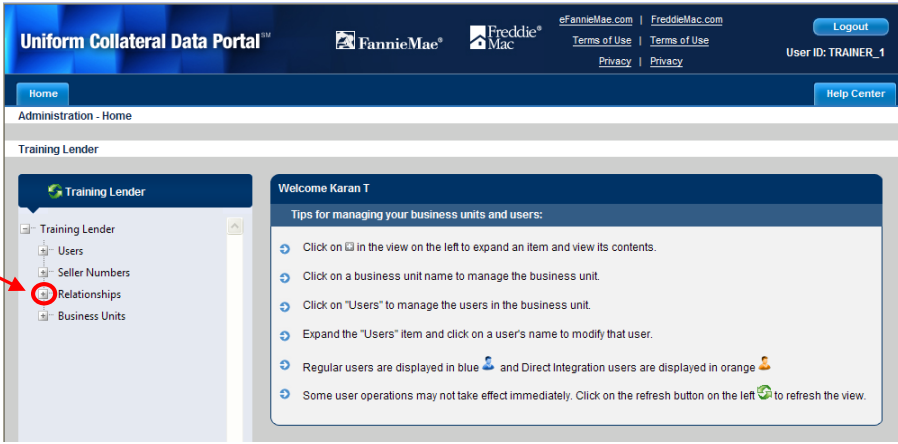

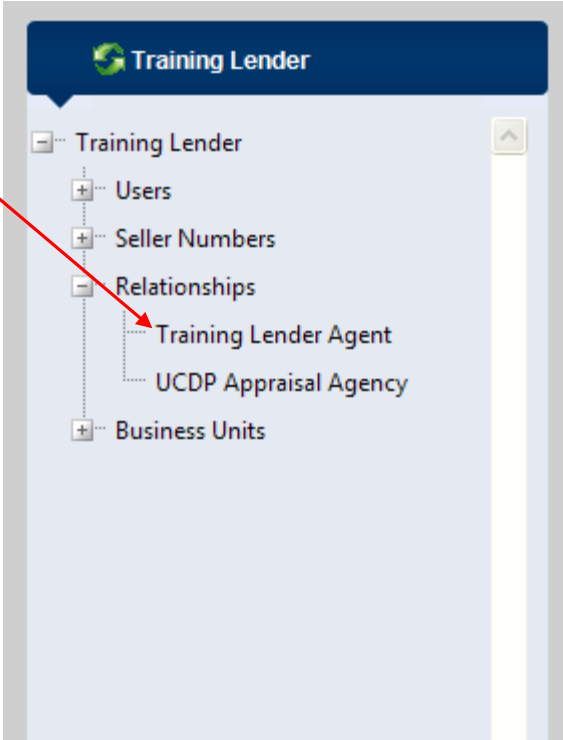
Typically, organizations submit appraisals under one Seller Number for each GSE. If your organization submits appraisals under more than one Seller Number for a given GSE, you have the flexibility to determine which Seller Number(s) the lender agent uses without exposing all of your organization's activity.

To assign and remove Seller Numbers to and from a lender agent, follow these steps:

### Assigning and Removing Seller Numbers

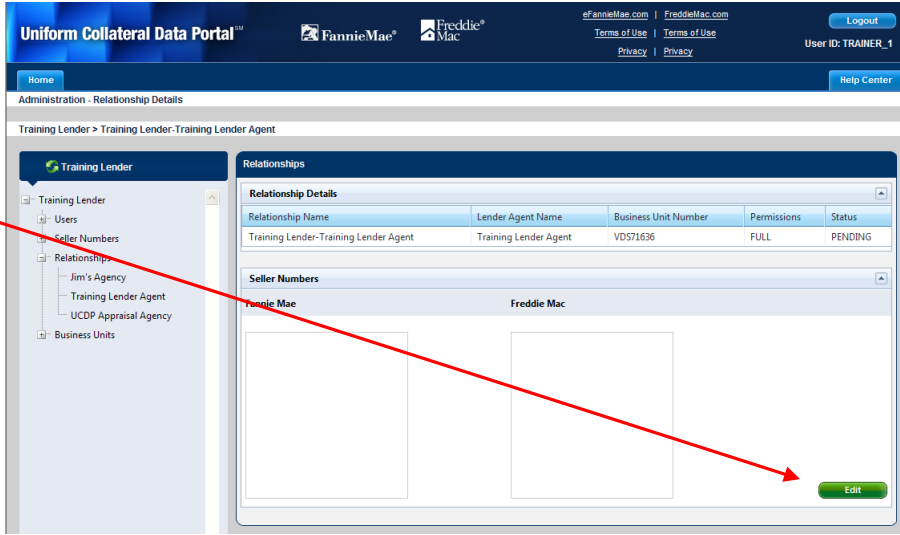

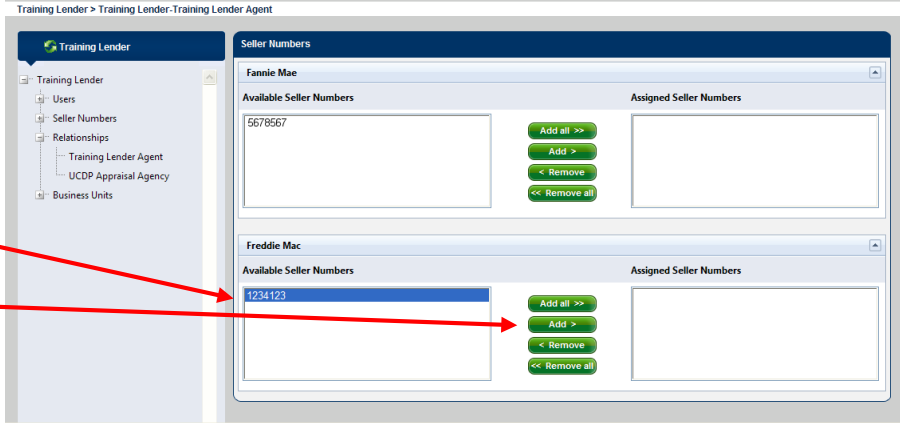
Step	Action / Result
<p>1. From the UCDP Home page, click the <b>Account Administration</b> tab and select <b>User and Business Unit Administration</b>.</p>	 <p>After you select <b>User and Business Unit Administration</b>, the <b>Administration - Home</b> page appears.</p>

## Assigning and Removing Seller Numbers

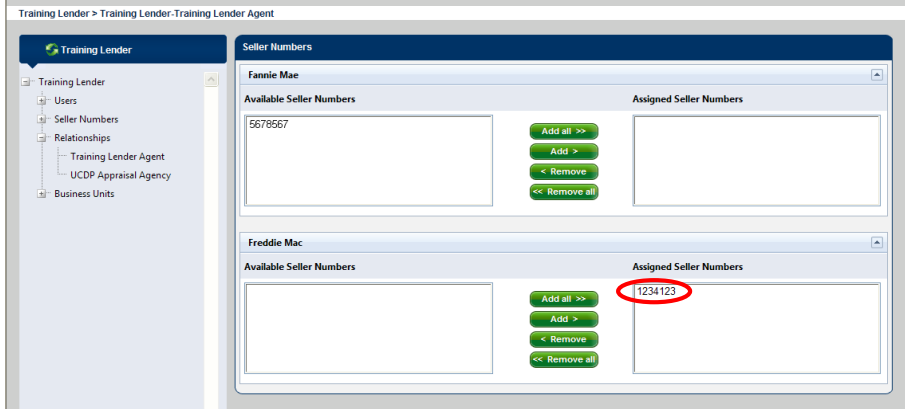

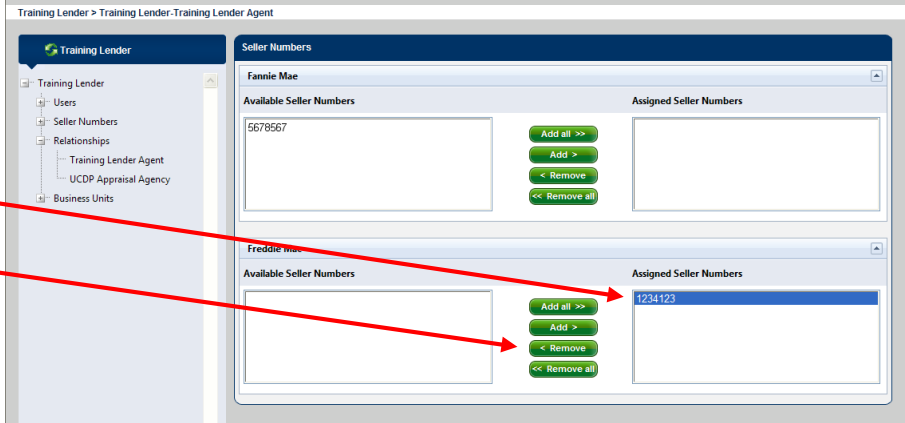
Step	Action / Result
<p>2. From the <b>Administration – Home</b> page, click the  in front of Relationships to open that node.</p>	 <p>After you click the , the list of authorized lender agents appears.</p>
<p>3. Click the name of the lender agent to which you are assigning a Seller Number(s).</p>	 <p>After you select the lender agent, the <b>Administration – Relationship Details</b> page appears for that lender agent.</p>



## Assigning and Removing Seller Numbers

Step	Action / Result
<p>4. From the <b>Administration – Relationships Details</b> page, click <b>Edit</b> to access the <b>Administration - Seller Numbers</b> page.</p>	 <p>After you click <b>Edit</b>, the <b>Administration – Seller Numbers</b> page appears for the lender agent selected. From this page you can assign or remove a Seller Number to/from the lender agent.</p>
<p>Assigning Seller Numbers</p> <p>5. From the <b>Administration - Seller Numbers</b> page, locate the list of <b>Available Seller Numbers</b>. Highlight a specific Seller Number in the list and select <b>Add</b>.</p> <p> The Available Seller Numbers list is populated with the same Seller Numbers(s) assigned to the business unit who invited the lender agent into a relationship.</p> <p>The <b>Add all</b> button allows you to assign all the Available Seller Numbers to the lender agent at one time.</p>	

## Assigning and Removing Seller Numbers

Step	Action / Result
	<p>After you select <b>Add</b>, the Assigned Seller Numbers list shows the added Seller Number.</p> 
<p>Removing Seller Numbers:</p> <p>6. From the <b>Administration Seller - Numbers</b> page, locate the list of Assigned Seller Numbers. Highlight a specific Seller Number and select <b>Remove</b>.</p> <p>The <b>Remove all</b> button allows you to remove all the Assigned Seller Numbers from a lender agent at one time.</p> <p> A lender agent needs at least one assigned Seller Number to successfully submit appraisal data files.</p>	 <p>Once you remove Seller Numbers from a business unit or a relationship, the submissions in that business unit using those seller numbers are still visible to the agent and the lender, but they become read-only (except to change the Seller Number to an active one, if one exists). Changing those submissions to a different active Seller Number makes the submissions read/write again.</p>

## Assigning and Removing Seller Numbers

### Step

### Action / Result

After you select **Remove**, the Assigned Seller Numbers list shows the Seller Number removed and now in the Available Seller Numbers list.

The screenshot displays the 'Seller Numbers' management interface within the 'Training Lender' application. The breadcrumb trail at the top reads 'Training Lender > Training Lender-Training Lender Agent'. On the left, a navigation tree shows the current path: Training Lender > Seller Numbers > Training Lender Agent > UCDP Appraisal Agency > Business Units. The main content area is divided into two sections for 'Fannie Mae' and 'Freddie Mac'. Each section has two columns: 'Available Seller Numbers' and 'Assigned Seller Numbers'. For Fannie Mae, the 'Available Seller Numbers' list contains '5678567', and the 'Assigned Seller Numbers' list is empty. For Freddie Mac, the 'Available Seller Numbers' list contains '1234123', which is circled in red, and the 'Assigned Seller Numbers' list is empty. Between the columns are four green buttons: 'Add all >>', 'Add >', '< Remove', and '<< Remove all'.

## Updating a Lender Agent Relationship

Once the lender agent has accepted the invitation, you can update their status. For example, you can change the status from “Active” to “Inactive” and vice versa.

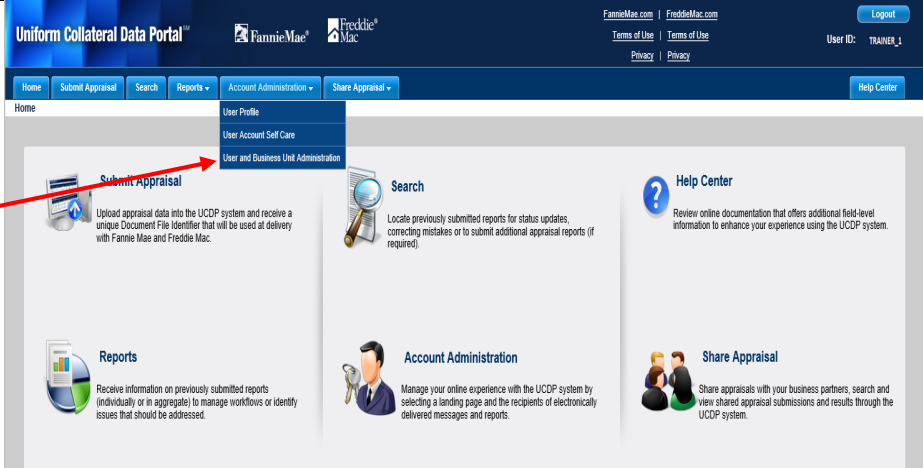

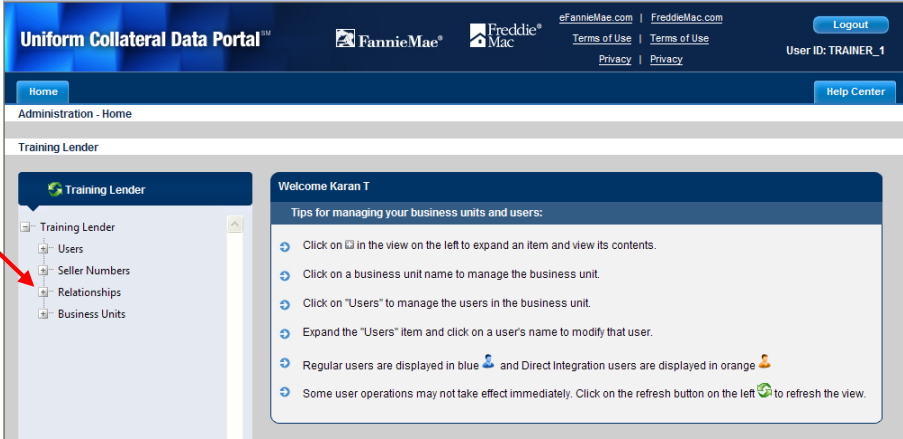


Unlike a user (lender admin, lender user, read-only lender user, or lender corragg user) or a business unit, you cannot permanently delete a lender agent. You can, however, leave it in an “Inactive” status.

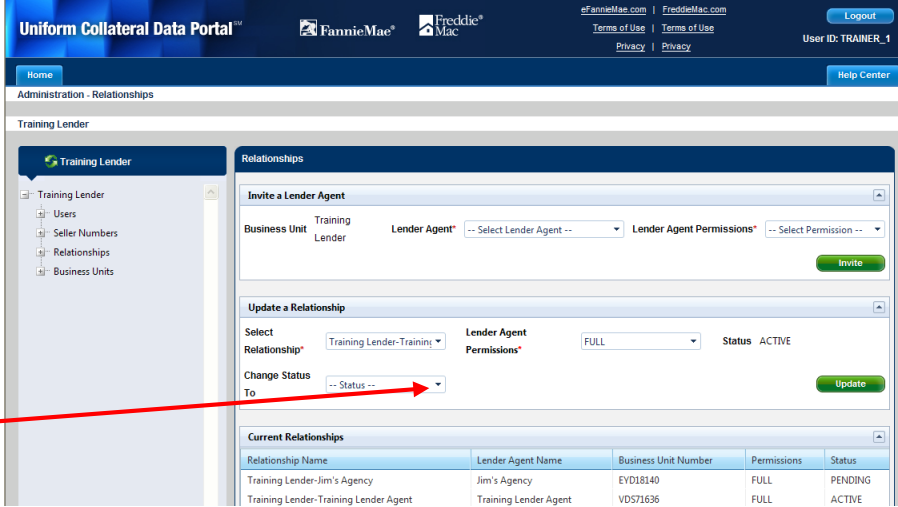


The lender corragg user role has access to the appraisal sharing functionality.

To update a lender agent relationship, follow these steps:

Updating a Lender Agent Relationship	
Step	Action / Result
<p>1. From the UCDP Home page, click the <b>Account Administration</b> tab and select <b>User and Business Unit Administration</b>.</p>	 <p>After you select <b>User and Business Unit Administration</b>, the <b>Administration - Home</b> page appears.</p>
<p>2. From the <b>Administration – Home</b> page, click <b>Relationships</b> in the left navigation bar.</p> <p> Click the <b>+</b> sign to display the list of lender agents associated with that business unit.</p>	 <p>After you select <b>Relationships</b>, the <b>Relationships</b> page appears. The middle section of this page, Update a Relationship, allows you to change the relationship status granted to the lender agent.</p>

## Updating a Lender Agent Relationship

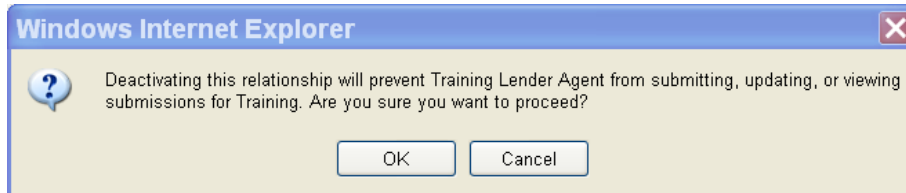
Step	Action / Result															
<p>3. From the <b>Relationships</b> page, click the <b>Select Relationship</b> dropdown to select the lender agent relationship you want to update.</p> <p>As applicable, click the <b>Change Status To</b> dropdown to update the status from “Active” to “Inactive” and vice versa.</p> <p>Click <b>Update</b>.</p>	 <p>The screenshot shows the 'Uniform Collateral Data Portal' interface. The 'Relationships' section is active, displaying an 'Update a Relationship' form. The form includes fields for 'Business Unit' (Training Lender), 'Lender Agent' (dropdown), and 'Lender Agent Permissions' (dropdown). The 'Status' is currently 'ACTIVE'. The 'Change Status To' dropdown is highlighted with a red arrow, indicating the next step in the process. Below the form is a table of 'Current Relationships'.</p> <table border="1"><thead><tr><th>Relationship Name</th><th>Lender Agent Name</th><th>Business Unit Number</th><th>Permissions</th><th>Status</th></tr></thead><tbody><tr><td>Training Lender-Jim's Agency</td><td>Jim's Agency</td><td>EYD18140</td><td>FULL</td><td>PENDING</td></tr><tr><td>Training Lender-Training Lender Agent</td><td>Training Lender Agent</td><td>VDS71636</td><td>FULL</td><td>ACTIVE</td></tr></tbody></table>	Relationship Name	Lender Agent Name	Business Unit Number	Permissions	Status	Training Lender-Jim's Agency	Jim's Agency	EYD18140	FULL	PENDING	Training Lender-Training Lender Agent	Training Lender Agent	VDS71636	FULL	ACTIVE
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Training Lender-Training Lender Agent	Training Lender Agent	VDS71636	FULL	ACTIVE												

## Updating a Lender Agent Relationship

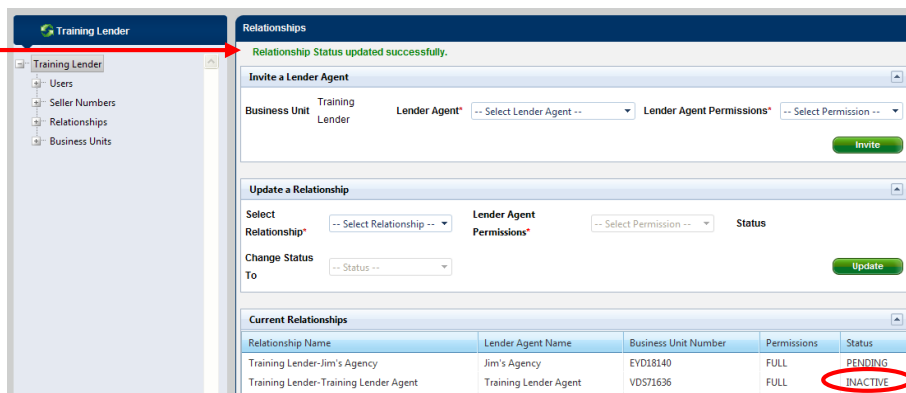
**Step**

**Action / Result**

After you click **Update**, different messages appear based on the changes made. If you changed the status from “Active” to “Inactive”, for example, a warning message appears asking you to confirm the action.



To complete the update, click **OK**. A **Relationship Status updated successfully** message appears. The Current Relationships section then shows an “Inactive” status for the lender agent.



If the lender agent's status is changed to “Inactive”, the lender retains access and all functionality associated with the appraisal data files.



The lender agent also has the ability to change the status of the relationship from “Active” to “Declined” at any time.

### Finding Additional Assistance

For additional assistance, refer to:

- [Fannie Mae's UCDP web page](https://www.fanniemae.com/singlefamily/uniform-collateral-data-portal/)  
(<https://www.fanniemae.com/singlefamily/uniform-collateral-data-portal/>)
- [Freddie Mac's UCDP web page](http://www.freddiemac.com/singlefamily/sell/uniform_collateral_data_portal.html)  
([http://www.freddiemac.com/singlefamily/sell/uniform\\_collateral\\_data\\_portal.html](http://www.freddiemac.com/singlefamily/sell/uniform_collateral_data_portal.html) )
- The UCDP Support Center at 1-800-917-9291
- UCDP Help Center (accessible after you log in to the UCDP)

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