

Consolidated Technology Guide – Frequently Asked Questions

Oct. 6, 2021

1. What is the Consolidated Technology Guide?

The Consolidated Technology Guide (“Guide”) is the new single point of reference for Fannie Mae’s technology licensing contract, the Software Subscription Agreement (“SSA”). The Guide combines into one source document the General Terms and Conditions (formerly called the Master Terms and Conditions) and all active Schedules that are part of the SSA. A particular Schedule applies only if the Licensee has been granted access to the Licensed Application covered by the Schedule.

2. Why create a Consolidated Technology Guide?

The number of Schedules that constitute the SSA has grown significantly over time and the current structure of the agreement and processes used to manage the SSA make it burdensome to update. The Guide eliminates the need for multiple Bulletins when more than one Schedule is being updated and streamlines the overall process, as all Guide content changes can be communicated via a single Bulletin. In addition, both the Guide and related Bulletins will be made available through a new dedicated web page on fanniemae.com rather than having to post on all of the various Single-Family and Multifamily application pages.

The Guide provides a transparent single point of reference for Licensees searching for a complete set of the current terms governing their use of a Licensed Application.

3. How does the new Guide format address these issues?

We are consolidating 19 separate documents into one volume, which will make the process of updating and managing the content considerably easier and will significantly reduce the amount of time spent on that work. Specifically, we will only need to prepare one Bulletin to capture multiple updates throughout the Guide.

Also, by combining the General Terms and Conditions and all active Schedules that constitute the SSA into the Guide, Licensees searching for the current terms governing their use of a Licensed Application will be able to find them more easily and see how they relate to one another in one document.

4. Will the Guide contain any new or revised content?

Other than “Master Terms and Conditions” being renamed “General Terms and Conditions” and the Software Subscription License being incorporated into the SSA, the initial publication of the Guide will not contain any revisions to the General Terms and Conditions or any Schedule. Content changes will resume after the first iteration of the Guide is published. The Preface, which is non-substantive, is the only new content in Guide. The Software Subscription License, which is new, will be published separately in tandem with the Guide; however, it only applies to new licensees.

5. Will current Licensees be required to comply with all content included in the Guide?

Once the Guide becomes effective 20 days after publication, each Licensee will be required to comply with all content included in the Guide that is applicable to that Licensee. The same General Terms and Conditions and any applicable Schedule(s) that applied prior to the Guide’s publication will apply after its publication – the presentation of the SSA components will change, but the substance will not. If the Licensee requests access to additional applications in the future, the Licensee will have to comply with the terms associated with those additional applications as well.



6. What is the purpose of the new Software Subscription License?

The Software Subscription License expands upon and replaces the one-page Software Subscription Agreement Form (shown below), whereby the Licensee agreed to comply with the SSA (i.e., the General Terms and the applicable Schedules that correspond to the Licensee’s access profile).

Software Subscription Form/Agreement

Please provide the following information:

Company/Licensee Name: _____
Company/Licensee Address: _____
City/State/Zip Code: _____
Point of Contact (POC) Name: _____
POC Phone: _____ POC Email: _____
Seller/Service Number: _____

BY EXECUTING THIS SOFTWARE SUBSCRIPTION FORM, LICENSEE (I) ACKNOWLEDGES READING THIS FORM AND THE ACCOMPANYING MASTER TERMS AND CONDITIONS (COLLECTIVELY, THE "FANNIE MAE SOFTWARE SUBSCRIPTION AGREEMENT" OR THE "AGREEMENT"), (II) ACCEPTS THE AGREEMENT WITHOUT ALTERATION OR ADDITION (EXCEPT FOR LICENSEE'S PROVISION OF THE INFORMATION REQUIRED BY THIS FORM), AND (III) AGREES TO BE BOUND THEREBY.

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

<small>Name of Authorized Representative</small>	<small>Title:</small>	<small>Date:</small>
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The Software Subscription License will serve a similar function and is intended to mirror the relationship between the Mortgage Selling and Servicing Contract and the Selling and Servicing Guides, whereby a seller/service agrees to comply with the Selling and Servicing Guide requirements that apply to the specific business activities it is engaged in. Similarly, in executing the Software Subscription License, the Licensee is agreeing that it will comply with all portions of the Guide that correspond to the applications the Licensee has access to at any given time, as reflected in the Licensee’s Registration/Account Management and, if applicable, Technology Manager profiles.

7. Will existing Licensees need to sign the new Software Subscription License?

No. Once the Software Subscription License is made available, only new Licensees who are accessing Fannie Mae technology for the first time will need to execute it. For existing Licensees, a Bulletin will be sent notifying them that Fannie Mae has published a Consolidated Technology Guide which contains all components of the SSA for which they previously provided their consent and, beginning 20 days after the Bulletin’s publication, they will be required to comply with the portions of the Guide that correspond to the applications they have access to.

8. Will existing addendums to the SSA be affected by the Guide?

No, the Guide’s publication will have no impact on addendums or amendments that were signed prior to the Guide’s release. None will require revision or re-execution and all will remain in effect in their current form.

9. Will the Guide and Software Subscription License be made available on fanniemae.com like the Bulletins and SSA-related documents were previously?

Yes, both the Guide and Software Subscription License will be posted to a new page on fanniemae.com that will exclusively provide content related to the Guide, and all of the links for the Technology Terms and Conditions that are currently posted on the specific application pages will be taken down. The SSA Master Terms will also be removed from the Selling Guide concurrent with publication of the Consolidated Technology Guide.



10. How will the Guide be updated once it is published, and will those updates be provided based on a predetermined schedule?

The Guide will be updated using Bulletins, which is the same method that was used to update the SSA Master Terms and Schedules in the past. The only difference is that going forward, a single Bulletin could contain updates for any of the Guide content. Currently, if the Desktop Underwriter® (DU®) Schedule, Desktop Originator® (DO®) Schedule and Uniform Collateral Data Portal® (UCDP®) Schedule needed to be updated, three Bulletins would need to be drafted—one for each Schedule—describing the changes that have been made to each. In the future state, changes made to any of those Schedules can be presented in a single Bulletin since all of that content will be part of the same Guide.

Bulletins and Guide updates will be published as needed on an ad hoc basis, with no set schedule.

11. Will the Technology Guide also include the Integration Agreement?

The Integration Agreement may be added in a future edition of the Technology Guide. Any developments will be communicated via Bulletin.

12. Will other types of content be included in future editions of the Guide?

The Software Subscription Agreement will be the primary focus initially; however, we are considering adding other technology-related resources.