

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>Aggregator Lender Admin</p>	<p>Step 1: Perform One-time Aggregator Set-up</p> <p>The Aggregator Profile set-up is the prerequisite step to begin receiving correspondent appraisals shared with your organization. As the Aggregator Lender Admin, you are responsible for creating and managing the aggregator profile for your organization within the UCDP web portal.</p> <p>From the UCDP Home page, click the Account Administration tab and select User and Business Unit Administration.</p> <p>Select your UCDP Business Unit, locate the Aggregator Set up section and fill out the required fields (Aggregator Name, City, State, FNM S/SN (5-digit), FRE SSN). 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 Uniform Collateral Data Portal Reference Series for the Lender Admin: 5 - Managing Aggregator Profile for step-by-step instructions.</p> <p>Notes:</p> <ul style="list-style-type: none"> • Aggregators must access the UCDP web portal to set up the aggregator profile. • 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. • 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. <div style="border: 1px solid black; background-color: #e0ffff; padding: 5px; margin-top: 10px;"> <p>Be sure to communicate the newly created Aggregator Name and Aggregator ID to your correspondent lenders so they can begin sharing appraisals with your organization.</p> </div>

Lender Role	Activity
	<p>Step 2: Review and Assign the UCDP role</p> <p>In order to retrieve correspondent-shared appraisals, aggregators must have the appropriate UCDP Role. As the lender admin, you are responsible for assigning one of the following UCDP roles to your user: Lender Admin or Lender CorrAgg User.</p> <p>Note: 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 Uniform Collateral Data Portal Reference Series for the Lender Admin: 3 - Managing Users for step-by-step instructions on how to assign or change a user's role in UCDP.</p> <p>To use the UCDP Direct Integration (DI) solution, your users must have the DI Lender role to successfully execute the appraisal sharing related DI services/calls.</p>
<p>Aggregator (Individual User)</p>	<p>Step 3: Retrieve Correspondent-shared Appraisals</p> <p><u>UCDP Web Solution:</u></p> <p>From the Home page, navigate to the Share Appraisal tab and select the Retrieve Appraisals from the drop-down to generate the Retrieve Shared Appraisals 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 Uniform Collateral Data Portal Appraisal Sharing User Guide for step-by-step instructions on retrieving correspondent-shared appraisals.</p> <p><u>UCDP DI Solution:</u></p> <ul style="list-style-type: none"> • Execute the optional GetDesignations DI call to retrieve a list of Doc File IDs that have been designated to you within the prescribed date range. • Execute the GetFindings, GetFindingsWait, and GetReports DI calls to access the correspondent-shared appraisal's status, findings, and SSR.