

Change Requests in C&DTM Multifamily Acquisitions





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Note: Click on the relevant section in the Contents table above to be navigated there.



Change Requests in C&D

Change Requests are used to change data on the various pages in C&D. For the "Commitment" page, change requests should be used for <u>confirmed Commitments only</u>. For the "Collateral", "Participants", and "Financing Options" pages, change requests are generally used after the Mortgage Loan data is submitted. An exception would be for deals that are funded under an ASAP Option and corrections to the "Loan" page need to be made before data submission. The Creating and Submitting Change Request sections will detail how to setup and submit a change request for a Commitment within the C&D application.

Navigating to C&D

1. Go to Fannie Mae's website: http://www.fanniemae.com/portal/index.html

Click on the "Business Partners" dropdown then select "Multifamily."

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Women who invent	Single-Family Landers & Servicers		÷.,	<u></u>			m	O Acc
	Multiheniky DUS Lenders & Servicets			â	*	÷	-	2
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2. Click on "Apps & Tech".





3. Under "Applications", click on "C & D."



4. Sign on using credentials. Please see the Lender Roles section at the end of this Job Aid.

Sign On								
The user ID or password that you entered is incorrect. Please check the spelling and try again.								
USERNAME								
" REQUIRED								
PASSWORD								
" REQUIRED								
Sign On								
Need Help With Your User ID or Password?								



Creating a Change Request

1. In order to create a Change Request, navigate to a confirmed Commitment and select "Change Requests" in the selection header. Select "Add Change Request" to open the "Change Request Detail" screen.

				Home Legal Contact U:
(Multifamily C	: & D [™]			
Commitment				1
Deal Name:	Test Deal	Deal ID: 44675		
Register Commitments	Collateral Participants Hedges Loa	ns Bonds Financing Options Change Requests		
			MBS Commitment	
			Commitments	
Commitment Information				
Commitment Number	897826		Commitment State	Confirmed
Commitment Last Updated	06/23/2020 2:15 PM	1 by CndUser TestId14	Commitment Submitted	06/23/2020 2:15 PM by
Fannie Mae Seller Name &	Number		Commitment Confirmed	06/23/2020 2:15 PM by CndUser TestId14
Commitment Expiration Da	+ 08/24/2020		Commitment Period (days)	63
Failine wae Pre-Review	 Delegated Mortgag 	e Loan	Pending Review:	
Additional Disclosure? (Definition)	+ Yes		Additional Disclosure Comments	Special Disclosure Comments
Additional Disclosure Selle	er Contact Name Special Discloure	Contact	Additional Disclosure Seller Contact E-	mail SpecialDisclosure@email.com
				Home Legal Contact Us
	۹ D [*]			
	αD			
Change Requests				M
Deal Name:	Test Deal	Deal ID: 44675		
Register Commitments	Collateral Participants Hedges Loar	s Bonds Financing Options Change Requests		
			Change Requests	
Delete Select	Change Request Number	Change Request State	Change Request Created	Change Request Closed
			Add Change Request	

2. Fill out the "Change Request Information" section by entering Lender Point of Contact, Email Address and Phone Number. Select "Yes" or "No" in 'Is this Change Request Due to Certification Failure?' drop down and select "Save".

NOTE: The email address entered in the "Lender Point of Contact Email Address" field will receive all system notifications pertaining to the Change Request.

Multifamily C & D [*]						
Change Request Detail Deal Name: Test Deal	Deal ID: 44675					MV-
Register Commitments Collateral Partic	inante Hedges Loans Bonds Financing Ontions Change Requests					
Register communents conderur runte	punta neugea coura bonda ninditenig optiona chunge requesta	Chang	e Request Detail			
		Ch	ange Requests			
		Sa	ve Successful			
		Save	Submit to Fannie Mae			
Change Request Information						
Change Request	LA037205		Change Reque	st State	Created	
Created By	06/30/2020 12:08 PM by MV-B Test User 8		Last Updated E	By .	06/30/2020 12:31 PM by MV-B Test User 8	
Lender Point of Contact	+ John Smith		Closed Date			
Lender Point of Contact Email Address	+ JSmith@xyzlender.com		Lender Point o	f Contact Phone Number	+ 888-123-4567	1
Change Request Detail						i and the second se
Certification Notification?	Is this Change Request Due to Certification Failure? No					
Change type	Select one or more pages for requested changes.	Palaat v				
	Undate Property Collateral (Property Name Collateral Reference Number)	Select	×			
	Undate Non-Property Collateral (Collateral Type - Collateral Reference Number)	Select V				
	Update Participant (Participant Name)	Select	~			
	Update Hedge (Hedge Identifier)	Select V				
	Update Loan (Seller Loan Number - Associated Commitment)	Select V				
	Update Bond Information (Bond ID)	Select V				
	Update Pool (Pool Number)	Select V				
	Update Cash Funding (Fannie Mae Loan Number)	Select V				
	Update Credit Enhancement (Credit Enhancement ID)	Select V				
Comments						
Lender Comments (Briefly Describe changes						
you would like to make)	+					
Fannie Mae Comments						
		Save	Submit to Fannie Mae			

Home Legal Contact Us



- 3. In the "Change Type" section, select the applicable C&D page identifier in the drop down. "Associated Commitments", "Collaterals", "Loans", and "Pools" will automatically be displayed in the drop down. For this example, an associated "Commitment", "Collateral", and "Loan" are selected.
 - **NOTE**: Notice that the data change detail in the yellow box below automatically displays for each selected Change Type. Additional Field/Labels can be added by clicking "Add New Row" or deleted by checking the "Delete" box and selecting "Delete Selected".

🛞 🛛 Multifamily C & D ້								<u>Home</u>	<u>Legal</u>	<u>Contact Us</u>
Change Request Detail		Deal ID: 44675								MV
Deal Name: Test Deal		Deal ID: 44075								
Register Commitments Collateral Partici	pants Hedges Loans B	onds Financing Options	Change Requests	A h B						
				Change Ri	equest Detail					
				Save S	luccessful					
				Save Subm	it to Fannie Mae]				
Change Request Information	1 4 99 79 95				Change Degue	at State	August 1			
Number	LA037205				Change Reque	est state	Created			
Created By	06/30/2020 12:08 PM by N	/IV-B Test User 8			Last Updated I	By	06/30/2020 12:31 PM by	MV-B Test User	8	
Lender Point of Contact	+ John Smith				Closed Date					_
Lender Point of Contact Email Address	+ JSmith@xyzlender.com	1			Lender Point o	of Contact Phone Number	+ 888-123-4567			
Change Request Detail	+ In this Change Dequest (Due to Cortification Failure?	No. X							
Change Type	+ Select one or more na	des for requested changes	NU V							
•	Update Commitment (Co	ommitment Number)		897826 🗸						
	Update Property Collater	ral (Property Name - Collater	al Reference Number)	Automation Collateral - 9999098	255 🗸					
	Update Non-Property Co	llateral (Collateral Type - Co	lateral Reference Number) Select V						
	Update Participant (Parti	icipant Name)		Select	\sim					
	Update Hedge (Hedge Id	entifier)		Select V						
	Update Loan (Seller Loan	n Number - Associated Com	nitment)	Loan_Variable - 897826 V						
	Update Bond Information	n (Bond ID)		Select V						
	Update Pool (Pool Numb	er) annie Mae Loan Number)		Select V						
	Update Credit Enhancen	nent (Credit Enhancement ID)	Select V						
Requested Commitment Changes -	Delete	,	, Field/Label			Current Data			Requested D	Jata
897826	Select		•							
	Add New Row Delete Se	lected								
Requested Property Collateral Changes -	Delete		Field/Label			Current Data			Requested D	Jata
Automation Collateral - 9999098255	Select		•							
	Add New Row Delete Se	lected								
Requested Loan Changes -	Delete		Field/Label			Current Data			Requested D	Jata
Loan_variable - 897826	Select		•							
	Add New Row Delete Se	lected								

4. Clicking on the drop down for "Field/Label" for the "Requested Commitment Changes" shows all fields on the "Commitment" page. Typing a word as shown below will display all fields with that word. All fields for the applicable C&D page will be displayed in the drop down for that page.

The "Deferred Delivery of Documents" field selections can be found in the "Field/Label" dropdown when selecting a Commitment number.

() Multifamily C & D							He	ome <u>Legal</u>	<u>Contact Us</u>
Change Request Detail									MV-
Deal Name: Test Deal		Deal ID: 44675							
Register Commitments Collateral Partici	ipants Hedges L	oans Bonds Financing Options	Change Requests						
				Change	Request Detail				
				Save	Successful				
				Save	omit to Fannie Mae				
Change Request Information					01 D				
Number	LA037205				Change Reques	at state	Created		
Created By	06/30/2020 12:0	3 PM by MV-B Test User 8			Last Updated B	у	06/30/2020 12:31 PM by MV-B Te	est User 8	
Lender Point of Contact	+ John Smith				Closed Date				
Lender Point of Contact Email Address	+ JSmith@xyzle	nder.com			Lender Point of	Contact Phone Number	+ 888-123-4567		
Change Request Detail Certification Notification?	+ Is this Change I	Request Due to Certification Failure?	0 ~						
Change Type	+ Select one of	more pages for requested changes.	<u> </u>						
	Update Commit	ment (Commitment Number)		897826 🗸					
	Update Propert	y Collateral (Property Name - Collateral	Reference Number)	Automation Collateral - 99990	98255 🗸				
	Update Non-Pro	operty Collateral (Collateral Type - Colla	teral Reference Number	Select V					
	Update Particip	ant (Participant Name)		Select	~				
	Update Hedge (Heage Identifier) eller Loan Number Associated Commi	tmont)	Select V					
	Update Bond In	formation (Bond ID)	unenty	Select V					
	Update Pool (P	ool Number)		Select V					
	Update Cash Fu	inding (Fannie Mae Loan Number)		Select V					
	Update Credit E	nhancement (Credit Enhancement ID)		Select V					
Requested Commitment Changes - 897826	Delete	Select	Field/Label			Current Data		Requested	Data
	L U	Genete	_	-					
	Add New Row	trade							
Requested Property Collateral Changes -	Delete	Commitment Details	Label			Current Data		Requester	1 Data
Automation Collateral - 9999098255		Date of Trade (mm/dd/yyyy)	Luber			Current Data		Requester	Duta
	Add New Row	Trader (Investor)							
Requested Loan Changes -	Delete		Field/Label			Current Data		Requested	I Data
Loan_Variable - 897826		Select	•						
	Add New Row	Delete Selected							

5. The "Current Data" and "Requested Data" fields are open text. Type in the "Current Data" as is on the applicable page in C&D and type the "Requested Data" as desired.

Change Request Detail							
Certification Notification?	+ Is this Change F	Request Due to Certification Failure? No V					
Change Type	+ Select one or	more pages for requested changes.					
	Update Commit	ment (Commitment Number)	897826 🗸				
	Update Property	Collateral (Property Name - Collateral Reference Number)	Automation Collateral - 9999098255 V				
	Update Non-Pro	perty Collateral (Collateral Type - Collateral Reference Number)	Select V				
	Update Particip	ant (Participant Name)	Select V	·]			
	Update Hedge (Hedge Identifier)	Select V				
	Update Loan (S	eller Loan Number - Associated Commitment)	Loan_Variable - 897826 V				
	Update Bond In	formation (Bond ID)	Select V				
	Update Pool (Po	ool Number)	Select V				
	Update Cash Fu	inding (Fannie Mae Loan Number)	Select V				
	Update Credit E	nhancement (Credit Enhancement ID)	Select V				
Requested Commitment Changes -	Delete	Field/Label			Current Data		Requested Data
897826		Date of Trade (mm/dd/yyyy)		05/12/2020]	05/16/2020	
	Add New Row	Delete Selected					
Requested Property Collateral Changes -	Delete	Field/Label			Current Data		Requested Data
Automation Collateral - 9999098255		Primary Property - Address 1		Norfolk	1	Chesapeake	
	Add New Row I	Delete Selected					
Requested Loan Changes -	Delete	Field/I abel			Current Data		Remuested Data
Loan_Variable - 897826	Delete	First Interest Rate Change Date (mm/dd/vvvv)		06/01/2020		07/01/2020	nequested bala
		•		00/01/2020]	0110112020	
	Add New Row	Delete Selected					

Submitting a Change Request

 To complete the Change Request, enter applicable Lender comments in the "Comments" section. Click the "Submit to Fannie Mae" button at the bottom of the page. After submitting to Fannie Mae, the change request can I no longer be edited, and the "Change Request State" will change from "Created" to "Submitted". Also, an email will be sent to the Lender contact email address upon submission of the Change Request.

Multifamily C & D [™]									<u>Home</u>	<u>Legal</u>	Contact Us
Change Request Detail		Deal ID: 44675									MV-E
Register Commitments Collateral Particip	pants Hedges I	oans Bonds Financing Options	Change Requests								
		3	5	Change	Request De	tail					
				Cha	nge Requests						
				Sav	e Successful						
				Save Si	ubmit to Fannie	Mae					
Change Request Information	_				_	_	_	_	_	_	
Change Request	LA037205				Change i	Request State		Created			
Created By	06/30/2020 12:0	8 PM by MV-B Test User 8			Last Upd	lated By		06/30/2020 12:31 F	PM by MV-B Test U	ser 8	
Lender Point of Contact	+ John Smith	o his by the bit cold of o			Closed D	Date		00/30/2020 12:311	m by m v b rest b.		
Lender Point of Contact Email Address	+ JSmith@xyzle	ender.com			Lender P	oint of Contact Phone	e Number	+ 888-123-4567			7
Change Request Detail	,							L			
Certification Notification?	+ Is this Change	Request Due to Certification Failure?	No V			_					
Change Type	* Select one o	r more pages for requested changes. tment (Commitment Number)		897826 V							
	Update Propert	ty Collateral (Property Name - Collater	al Reference Number)	Automation Collateral - 9999	098255 🗸						
	Update Non-Pr	operty Collateral (Collateral Type - Col	lateral Reference Number	Select V							
	Update Particip	oant (Participant Name)		Select		\sim					
	Update Hedge	(Hedge Identifier)		Select V							
	Update Loan (S	Seller Loan Number - Associated Com	mitment)	Loan_Variable - 897826 V							
	Update Bond In	Itormation (Bond ID)		Select V							
	Update Pool (P	unding (Fannie Mae Loan Number)		Select V							
	Update Credit I	Enhancement (Credit Enhancement ID)	Select V							
Requested Commitment Changes -	Delete		Field/Label				Current Data			Requested	Data
897826		Date of Trade (mm/dd/yyyy)	•			05/12/2020			05/16/2020		
	Add New Row	Delete Selected									
Requested Property Collateral Changes -	Delete		Field/Label				Current Data			Requested	Data
Automation Collateral - 9999098255		Primary Property - Address 1	•			Norfolk			Chesapeake		
	Add New Row	Delete Selected									
Requested Loan Changes -	Delete	First listered Data Observe Data (m	Field/Label				Current Data		[Requested	Data
Loan_vanable - 037020	L	First interest Rate Change Date (mm	/dd/yyyy) 🔻			06/01/2020			07/01/2020		
	Add New Row	Delete Selected									
Comments							_				
Lender Comments (Briefly Describe changes you would like to make)	Changing Tra	de Date, Primary Address 1 an	d First Interest Rate	e Change Date.							
Fannie Mae Comments											
				Save	ubmit to Fannie	Mae					

- 2. If the Change Request needs to be edited once it is in the "Submitted" state, a Fannie Mae Acquisitions Analyst will unlock the Change Request and return it to the Lender. The "Change Request State" will then change back to "Created" so the Lender can edit and resubmit. An email will be sent to the Lender contact email address when the Change Request is returned to the Lender.
- 3. When the Change Request is completed, the "Change Request State" will change to "Closed" and an email will be sent to the Lender contact email address specifying the status change to Closed.



Lender Roles (Contact your Technology Manager):

Three security roles exist for Lenders: "View Only", "Lender Analyst", and "Lender Manager". Lenders will only have access to deals that correspond to the 5-digit Seller Loan Number of their company but will have access to all branch numbers. The roles are outlined below.

Security roles are set up for users based on the information provided on the User Registration forms for C&D. The two main types of security roles are: "View Only" and "Edit". View Only means users can view data but not add, modify, or delete data. With Edit access, users may make modifications to certain data depending on their level of access.

Lender Roles	Capabilities	Notes
Lender View Only	View Only on all screens. Users cannot add, update or delete data, but can navigate to all screens. Can use Download action to download any/all data. Can view and generate reports.	
Lender Analyst	Users can enter data on all screens – "Registration", "Commitment", "ASAP+ Early Funding", "Loan", "Pool", "Participant", and "Collateral". Can run ACheck, PPTMPP, and all business validations. Can use Upload action to upload any/all data. Can use Download action to download any/all data.	Can delete pools, commitments, and collateral only in proper state (i.e. nothing confirmed or submitted)
Lender Manager	Users can enter data on all screens – "Registration", "Commitment", "ASAP+ Early Funding", "Loan", "Pool", "Participant", "Collateral", and "Seller Profile". Can run ACheck, PPTMPP, and all business validations. Can use Upload action to upload any/all data. Can use Download action to download any/all data. Can "Submit Commitment", "Submit for Securitization", and "Submit ASAP+ Early Funding Request. Can "Add Change Request" for Super User review.	Can delete Pools, Commitments, and Collateral only in proper state (i.e., nothing confirmed or submitted). Can add Payee Code Nicknames to active Payee Codes.



Contact Information

Team	Email		
Multifemily Acquisitions (Conventional & Affordable)	mf_acquisitions@fanniemae.com		
	mf_forwards_team@fanniemae.com		
Data Change Team	SU_Requests@fanniemae.com		
Certification & Custody Team	MultifamilyCertification-Group-FWD@fanniemae.com		
Multifamily Disclosure	mfmbs_disclosureqa@fanniemae.com		
DUS DocWay™	DUSDocWay_Support@fanniemae.com		
Capital Markets Operations	capmktsops_settlements@fanniemae.com		