Change Requests in C&D™
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 confirmed Commitments only. 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

   Click on the “Business Partners” dropdown then select “Multifamily.”

2. Click on “Apps & Tech”.
3. Under “Applications”, click on “C & D.”

![Image of a website interface showing applications and technology]

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.

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.
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”.
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.

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.
Submitting a Change Request

1. 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 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.

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.

<table>
<thead>
<tr>
<th>Lender Roles</th>
<th>Capabilities</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lender View Only</td>
<td>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.</td>
<td>Can delete pools, commitments, and collateral only in proper state (i.e. nothing confirmed or submitted)</td>
</tr>
<tr>
<td>Lender Analyst</td>
<td>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.</td>
<td>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.</td>
</tr>
</tbody>
</table>
## Contact Information

<table>
<thead>
<tr>
<th>Team</th>
<th>Email</th>
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</thead>
<tbody>
<tr>
<td>Multifamily Acquisitions (Conventional &amp; Affordable)</td>
<td><a href="mailto:mf_acquisitions@fanniemae.com">mf_acquisitions@fanniemae.com</a>  &lt;br&gt;<a href="mailto:mf_forwards_team@fanniemae.com">mf_forwards_team@fanniemae.com</a></td>
</tr>
<tr>
<td>Data Change Team</td>
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<tr>
<td>Certification &amp; Custody Team</td>
<td><a href="mailto:MultifamilyCertification-Group-FWD@fanniemae.com">MultifamilyCertification-Group-FWD@fanniemae.com</a></td>
</tr>
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<td>Multifamily Disclosure</td>
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<td>Capital Markets Operations</td>
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