



Technology Manager Administrator Registration Job Aid

Instructions for completing the Technology Manager Registration online Request [Form](#). For further assistance contact the Technology Service Center at 800-2FANNIE (232-6643), or your Fannie Mae representative.

Overview

This process to provide a Corporate Administrator (CA) or User Administrator (UA) permissions for Technology Manager starts with completing the online Technology Manager Administrator Registration request. Authorized representatives from your organization may request a new or update to an existing CA or UA role. By submitting the request, the representative is agreeing to be responsible for any actions taken by the administrator through Technology Manager and to periodically review the status of each Administrator.

Completing the Administrator Registration Request Form

A single red asterisk (*) indicates a required field. Double red asterisks (**) indicates a field required for a New User.

1. From the **Customer Type** drop down menu, select the **customer type** that best describes the activity that your company performs:

The image shows a screenshot of a web form. On the left, there is a label "Select Customer Type:" followed by a red asterisk. To the right of the label is a dropdown menu with a blue border and a white background. The dropdown menu currently displays the text "Select one" and has a small downward-pointing arrow on the right side.

- a. **Single Family Lender** - Fannie Mae-approved Seller/Service for Single Family.
- b. **Multifamily Lender** - Fannie Mae-approved Seller/Service for Multifamily.
- c. **CU Only** - This is for UCDP-Only correspondents that have already elected to register for Collateral Underwriter.
- d. **Mortgage Originator** - Mortgage Brokers sponsored by Fannie Mae-approved lenders. *See specialized instructions here.*
- e. **REO Vendor** - Fannie Mae-approved vendors for real estate owned (REO) properties.
- f. **Mortgage Insurer** - Fannie Mae-approved mortgage insurers.
- g. **Custodians** - Fannie Mae-approved institutions that provide document custody services on behalf of Fannie Mae and approved seller/service.

NOTE: *The applications available for an administrator to manage within Technology Manager will differ based on your customer type.*



2. In the **Requestor Identification** section, complete the following fields:

| Requestor Information | |
|-----------------------|---|
| Name: * | <input type="text" value="Mary Smith"/> |
| E-mail: * | <input type="text" value="mary.smith@onebank.com"/> |
| Phone: | <input type="text" value="703-555-1234"/> Ext: <input type="text" value="512"/> x |

- Name** – Enter the **first name and last name of the individual who is submitting the request**. This individual will receive status updates and will be contacted if there are any issues with the request.
- E-mail** – Enter the **E-mail of the individual submitting the request**. This E-mail address will be used to send initial E-mail confirmations of the request receipt and a subsequent E-mail confirmation when the request is completed.
- Phone** – Enter the **requester’s phone number**. Enter just the number, dashes will be inserted automatically.

3. For the **Desired Administrator Type**, select the corresponding **radio button next to** either the Corporate Administrator or User Administrator.

| Desired Administrator Type: |
|--|
| <input type="radio"/> Corporate Administrator - Has the authority to manage all access to Fannie Mae technology for your company, including activating and configuring applications, managing user access, and managing lender-broker relationships, if applicable. This role is available to Fannie Mae seller/servicers only. <i>Individuals designated as Corporate Administrators will have the ability to legally bind your company by signing and submitting requests and terms and conditions for technology applications until Fannie Mae receives a signed Administrator Registration Request directing that their status as a Corporate Administrator be terminated. Corporate Administrators will be the recipients of Bulletins to your company’s Software Subscription Agreement with Fannie Mae.</i> |
| <input type="radio"/> User Administrator - Has the authority to set up and manage user profiles, passwords, and access to Fannie Mae technology applications. This role is for Fannie Mae Lenders and non-Lenders. |

NOTE: Some Customer Types will only see **User Administrator** availability.

4. Enter your **Company Information**, Company Name (Legal Name and dba, if applicable) and one of the following identifiers based on your Customer Type:

| Customer Type | Customer Identifier |
|---|---|
| <ul style="list-style-type: none"> Single Family Lender Multifamily Lender | Seller/Service Number (5-digit Number) |
| <ul style="list-style-type: none"> DU Only CU Only | Non-Seller/Service Number (5-digit Number) |
| <ul style="list-style-type: none"> Mortgage Originator REO Vendor Mortgage Insurer Custodians | User Group ID (6-character alpha-numeric) a.k.a. Subscriber ID. HINT – The first five characters of a User ID is the same as the first five characters of the User Group/Subscriber ID. |



5. **Registration Information.** Select one **User Type**:

Registration Information *

User Type: New User ID Existing User ID

- **New User ID** for a new Administrator ID. Skip Step 6 and proceed to Step 7.
- **Existing User ID** to update an existing ID or to convert an existing user to an Administrator. Complete the **Desired Action** section that appears and continue to Step 6, but there is no need to enter E-mail, Phone or PIN.

Desired Action: Assign/update access privileges Delete all administrator privileges

Enter Existing User ID (8-character, i.e., a1234xyz): *

- Assign/update access privileges** - an existing user needs to be converted to an administrator or an existing administrator needs to change what they can manage (for CAs, Seller/Servicer Numbers; For UAs, User Groups or Applications).
- Delete all administrator privileges** - the administrator noted in the following section needs to have all administrator access removed from their ID.

NOTE: The ID will remain active, but be demoted to the access of an end user. If the user needs to be deleted completely, follow your existing access termination procedure.

6. Enter the following **Administrator Information** for the individual who is being setup or whose access is being modified. Those fields marked with (**) are required for a new user. These fields can be completed for an existing user if this information needs to be updated.

Administrator Information

Administrator Name: *

E-mail: **

Phone: ** Ext:

PIN (4-digits): **

- Administrator Name** – Enter the first and last name. This is a required field for both new and existing.
- E-mail** – Enter the **Administrator’s E-mail address**. Password setup instructions will be sent to this E-mail address.
- Phone** – Enter the **Administrator’s Phone number**. Enter just the number, dashes will be inserted automatically.
- PIN** – Enter a **unique 4-digit numeric PIN**. This number should be unique to this individual.



7. Click the **Next** Button to continue.

NOTE: For **Corporate Administrator Setup**, continue to Step 8, skip Steps 9 and 10, proceed to step 11.

For **User Administrator Setup**, skip Step 8, proceed to Step 9.

8. Complete the Corporate Administrator Setup. This section is to request to add and/or update or remove up to six Seller/Service Numbers under a Corporate Administrator's control. Check the Add or Remove box and enter up to six 5-digit **Seller/Service Number**. Enter one 5-digit number per box. Proceed to step 11.

Corporate Administrator Setup **

Please indicate the 5-digit Seller/Service number to be added or removed:

| | | | | | | |
|---------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="checkbox"/> Add | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> Remove | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

9. Complete the **User Administrator Setup**. This section is to request to add and/or update User Groups that a User Administrator manages. Check the **Add or Remove** box and enter a 6-character alphanumeric **User Group ID** and the **User Group Name**. (User Group ID - a.k.a. Subscriber ID)

User Administrator Setup **

Please enter User Group ID, User Group Name, and select add or remove group: Select One:

| Add | Remove | | |
|--------------------------|--------------------------|-------------------|---------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | User Group ID: ** | User Group Name: ** |
| <input type="checkbox"/> | <input type="checkbox"/> | User Group ID: | User Group Name: |
| <input type="checkbox"/> | <input type="checkbox"/> | User Group ID: | User Group Name: |
| <input type="checkbox"/> | <input type="checkbox"/> | User Group ID: | User Group Name: |

10. Complete the **Application Setup** section. This section is to request to add and/or update applications that a User Administrator manages within the User Groups. Check the **Add or Remove** box next to the desired applications. The applications listed in this section correlates to the Customer Type which was selected at the top of the request.

Application Setup

If additional applications are needed, please select from the applications listed below.

| Add | Remove | Application |
|--------------------------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | ACheck |
| <input type="checkbox"/> | <input type="checkbox"/> | ARM Index Values |
| <input type="checkbox"/> | <input type="checkbox"/> | Cash Remittance System |
| <input type="checkbox"/> | <input type="checkbox"/> | CESIR |
| <input type="checkbox"/> | <input type="checkbox"/> | C&D(Committing and Delivery System) |
| <input type="checkbox"/> | <input type="checkbox"/> | eRents |



11. Click the **Next** Button You will have the option to submit two additional Administrators if desired or continue to the **Review and Submit Page**.
12. Review this page for the information that was entered on the previous two pages. If there are any changes needed, click the **Edit Form** button at the bottom of the page, go back and make changes. When the form is accurately completed, scroll down to proceed to the signature.

Review and Submit your request

Once your Administrator Registration Form is signed and submitted below, it will be sent to the Fannie Mae Technology Registration team for processing. You will receive confirmation via e-mail that the request has been received, and another e-mail notification within 3 business days, when your request has been completed.

Please contact the Customer Contact Center at 800-232-6643, or your Fannie Mae representative, if you have any questions regarding the status of this request.

REQUESTOR INFORMATION

Name: Mary Smith
E-mail: mary.smith@onebank.com
Phone: 703-555-1234 Ext: 512

COMPANY INFORMATION

Seller/Service 5-digit Number: 52353
Company Name: OneBank

ADMINISTRATOR INFORMATION

Please select one of the following: New User
Administrator Name: John Smith
Phone: 703-555-5678 Ext: 612
E-mail: john.smith@onebank.com

13. At the bottom of the page, enter the **name and title of the authorized representative** who is agreeing to the legal language set forth in this request form.

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

Authorized Representative: Title:

Date: 08/17/2016

14. Enter the **captcha letters and numbers** presented. Click the Refresh Captcha button to create a new Captcha option to enter.
15. Click the **Submit** button to submit the request.

Please print this page for your records and submit your request below.

i c k r 8 7 y

Refresh Captcha

Edit Form Submit

What to expect next:

1. The Requester will receive an initial confirmation E-mail with the submitted information.
2. The Request will receive a second E-mail which contains a tracking number for this request indicating that the Technology Registration Team received and has started processing the request.
3. Within 3 business days the Requester will receive a notification that the request is completed.
4. If the request was for a new User ID, then the new administrator will receive an email to setup their new password.