



Change Requests in C&D™

Multifamily Acquisitions





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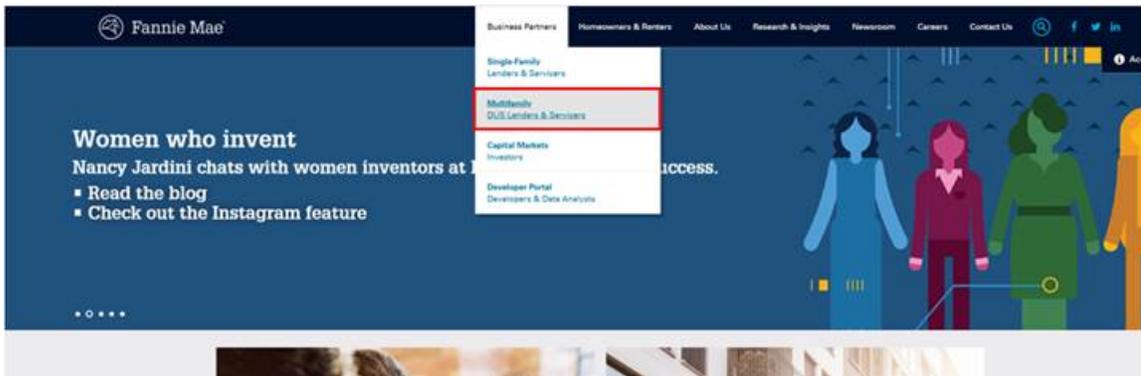
Change Requests in C&D

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.

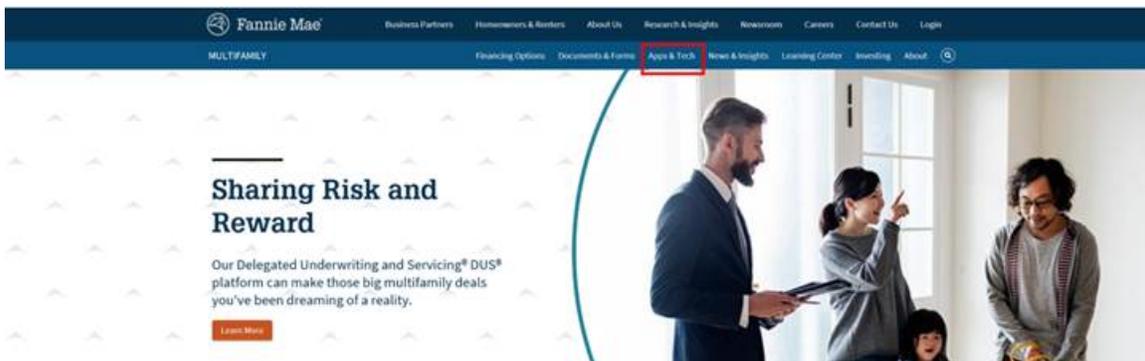
Navigating to C&D

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

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

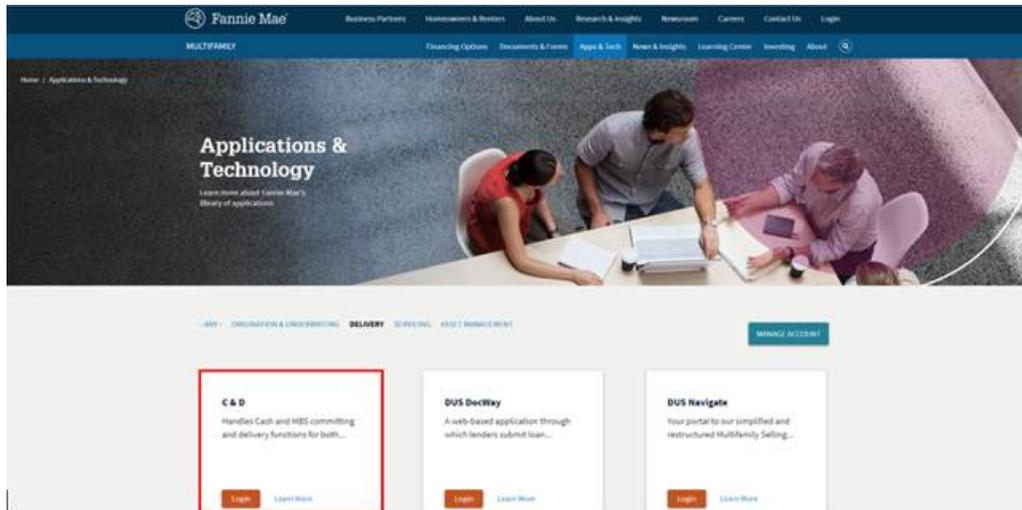


2. Click on “Apps & Tech”.





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.

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Commitment
Deal Name: Test Deal Deal ID: 44675

Register Commitments Collateral Participants Hedges Loans Bonds Financing Options **Change Requests**

MBS Commitment
Commitments

Commitment Information		Commitment State	
Commitment Number	897826	Commitment State	Confirmed
Commitment Last Updated	06/23/2020 2:15 PM 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 Date	+ 08/24/2020	Commitment Period (days)	63
Fannie Mae Pre-Review	+ Delegated Mortgage Loan	Pending Review?	<input type="checkbox"/>
Additional Disclosure? (Definition)	+ Yes	Additional Disclosure Comments	Special Disclosure Comments
Additional Disclosure Seller Contact Name	Special Disclosure Contact	Additional Disclosure Seller Contact E-mail	SpecialDisclosure@email.com

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Change Requests
Deal Name: Test Deal Deal ID: 44675

Register Commitments Collateral Participants Hedges Loans Bonds Financing Options **Change Requests**

Delete Select	Change Request Number	Change Request State	Change Request Created	Change Request Closed

[Add Change Request](#)

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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.

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Change Request Detail
Deal Name: Test Deal Deal ID: 44675

Register Commitments Collateral Participants Hedges Loans Bonds Financing Options **Change Requests**

Change Request Detail
Change Requests
Save Successful

Save Submit to Fannie Mae

Change Request Information		Change Request State	
Change Request Number	LA037205	Change Request State	Created
Created By	06/30/2020 12:08 PM by MV-B Test User 8	Last Updated 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 of Contact Phone Number	+ 888-123-4567

Change Request Detail
Certification Notification? **Is this Change Request Due to Certification Failure?** No

Change Type

Select one or more pages for requested changes.

Update Commitment (Commitment Number)	Select...
Update Property Collateral (Property Name - Collateral Reference Number)	Select...
Update Non-Property Collateral (Collateral Type - Collateral Reference Number)	Select...
Update Participant (Participant Name)	Select...
Update Hedge (Hedge Identifier)	Select...
Update Loan (Seller Loan Number - Associated Commitment)	Select...
Update Bond Information (Bond ID)	Select...
Update Pool (Pool Number)	Select...
Update Cash Funding (Fannie Mae Loan Number)	Select...
Update Credit Enhancement (Credit Enhancement ID)	Select...

Comments

Lender Comments (Briefly Describe changes you would like to make)

Fannie Mae Comments

Save Submit to Fannie Mae

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- 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".

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Change Request Detail Deal ID: 44675

Register Commitments Collateral Participants Hedges Loans Bonds Financing Options Change Requests

Change Request Detail

[Change Requests](#)
[Save Successful!](#)

Change Request Information		Change Request State	
Change Request Number	LA037205	Change Request State	Created
Created By	06/30/2020 12:08 PM by MV-B Test User 8	Last Updated 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 of Contact Phone Number	+ 888-123-4567

+	Is this Change Request Due to Certification Failure?	No
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+ Select one or more pages for requested changes.

Update Commitment (Commitment Number)	897826
Update Property Collateral (Property Name - Collateral Reference Number)	Automation Collateral - 9999098255
Update Non-Property Collateral (Collateral Type - Collateral Reference Number)	Select...
Update Participant (Participant Name)	Select...
Update Hedge (Hedge Identifier)	Select...
Update Loan (Seller Loan Number - Associated Commitment)	Loan_Variable - 897826
Update Bond Information (Bond ID)	Select...
Update Pool (Pool Number)	Select...
Update Cash Funding (Fannie Mae Loan Number)	Select...
Update Credit Enhancement (Credit Enhancement ID)	Select...

Requested Commitment Changes - 897826	Delete	Field/Label	Current Data	Requested Data
	<input type="checkbox"/>	Select...		
<input type="button" value="Add New Row"/> <input type="button" value="Delete Selected"/>				
Requested Property Collateral Changes - Automation Collateral - 9999098255	Delete	Field/Label	Current Data	Requested Data
	<input type="checkbox"/>	Select...		
<input type="button" value="Add New Row"/> <input type="button" value="Delete Selected"/>				
Requested Loan Changes - Loan_Variable - 897826	Delete	Field/Label	Current Data	Requested Data
	<input type="checkbox"/>	Select...		
<input type="button" value="Add New Row"/> <input type="button" value="Delete Selected"/>				



- 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

Change Request Detail
Deal Name: Test Deal Deal ID: 44675

Register | Commitments | Collateral | Participants | Hedges | Loans | Bonds | Financing Options | **Change Requests**

Change Request Detail
Change Requests
Save Successful

Save Submit to Fannie Mae

Change Request Information

Change Request Number	LA037205	Change Request State	Created
Created By	06/30/2020 12:08 PM by MV-B Test User 8	Last Updated 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 of Contact Phone Number	+ 888-123-4567

Change Request Detail

Certification Notification? + Is this Change Request Due to Certification Failure? No

Change Type + Select one or more pages for requested changes.

Update Commitment (Commitment Number)	897826		
Update Property Collateral (Property Name - Collateral Reference Number)	Automation Collateral - 9999098255		
Update Non-Property Collateral (Collateral Type - Collateral Reference Number)	Select...		
Update Participant (Participant Name)	Select...		
Update Hedge (Hedge Identifier)	Select...		
Update Loan (Seller Loan Number - Associated Commitment)	Loan_Variable - 897826		
Update Bond Information (Bond ID)	Select...		
Update Pool (Pool Number)	Select...		
Update Cash Funding (Fannie Mae Loan Number)	Select...		
Update Credit Enhancement (Credit Enhancement ID)	Select...		

Requested Commitment Changes - 897826	Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>		Select...		
<input type="checkbox"/>		trade		
<input type="checkbox"/>		Commitment Details		
<input type="checkbox"/>		Date of Trade (mm/dd/yyyy)		
<input type="checkbox"/>		Trader (Investor)		

Requested Property Collateral Changes - Automation Collateral - 9999098255	Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>		Select...		

Requested Loan Changes - Loan_Variable - 897826	Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>		Select...		

- 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 Request Due to Certification Failure? No

Change Type + Select one or more pages for requested changes.

Update Commitment (Commitment Number)	897826		
Update Property Collateral (Property Name - Collateral Reference Number)	Automation Collateral - 9999098255		
Update Non-Property Collateral (Collateral Type - Collateral Reference Number)	Select...		
Update Participant (Participant Name)	Select...		
Update Hedge (Hedge Identifier)	Select...		
Update Loan (Seller Loan Number - Associated Commitment)	Loan_Variable - 897826		
Update Bond Information (Bond ID)	Select...		
Update Pool (Pool Number)	Select...		
Update Cash Funding (Fannie Mae Loan Number)	Select...		
Update Credit Enhancement (Credit Enhancement ID)	Select...		

Requested Commitment Changes - 897826	Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>		Date of Trade (mm/dd/yyyy)	05/12/2020	05/18/2020

Requested Property Collateral Changes - Automation Collateral - 9999098255	Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>		Primary Property - Address 1	Norfolk	Chesapeake

Requested Loan Changes - Loan_Variable - 897826	Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>		First Interest Rate Change Date (mm/dd/yyyy)	06/01/2020	07/01/2020



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.

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Multifamily C & D

Change Request Detail Deal ID: 44675

Deal Name: Test Deal

Register | Commitments | Collateral | Participants | Hedges | Loans | Bonds | Financing Options | **Change Requests**

Change Request Detail
Change Requests
Save Successful

Save Submit to Fannie Mae

Change Request Information

Change Request Number	LA037205	Change Request State	Created
Created By	06/30/2020 12:08 PM by MV-B Test User 8	Last Updated 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 of Contact Phone Number	+ 888-123-4567

Change Request Detail

Certification Notification? + Is this Change Request Due to Certification Failure? No

Change Type + Select one or more pages for requested changes.

Update Commitment (Commitment Number)	897826
Update Property Collateral (Property Name - Collateral Reference Number)	Automation Collateral - 9999098255
Update Non-Property Collateral (Collateral Type - Collateral Reference Number)	Select...
Update Participant (Participant Name)	Select...
Update Hedge (Hedge Identifier)	Select...
Update Loan (Seller Loan Number - Associated Commitment)	Loan_Variable - 897826
Update Bond Information (Bond ID)	Select...
Update Pool (Pool Number)	Select...
Update Cash Funding (Fannie Mae Loan Number)	Select...
Update Credit Enhancement (Credit Enhancement ID)	Select...

Requested Commitment Changes - 897826

Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>	Date of Trade (mm/dd/yyyy)	05/12/2020	05/16/2020

Add New Row Delete Selected

Requested Property Collateral Changes - Automation Collateral - 9999098255

Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>	Primary Property - Address 1	Norfolk	Chesapeake

Add New Row Delete Selected

Requested Loan Changes - Loan_Variable - 897826

Delete	Field/Label	Current Data	Requested Data
<input type="checkbox"/>	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 Trade Date, Primary Address 1 and First Interest Rate Change Date.

Fannie Mae Comments

Save Submit 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
Multifamily 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	mfmbbs_disclosureqa@fanniemae.com
DUS DocWay™	DUSDocWay_Support@fanniemae.com
Capital Markets Operations	capmktops_settlements@fanniemae.com