

What is a User Role?

User roles determine a designated user's authority within an organization to access various screens and perform selected functions within the application.

The selling system has defined several user roles for Guarantor and MultiLender executions. Your organization may assign multiple user roles to an individual. Consider the following points when completing the Form 900, *Selling System Authorized User Identification and Certification Form* to request an assignment of new user roles:

- You should assign back-up user roles in the event a user is not available.
- Combine user roles (where you can) to provide access to all the functions a user may need.
- You cannot combine the roles of Setup Administrator and Setup Manager.
- Don't make assignments or assumptions based only on the "title" of a role.
- The person designated as the Selling System Setup Manager must be identified as an authorized person on the Seller's certificate of incumbency.

Once you receive your user ID and password, test them immediately to ensure that you have the appropriate access. You must submit a new Form 900 in order to add, delete, or modify user roles.

Purpose

Use the table below to determine what tasks each user role can accomplish for Guarantor and MultiLender executions in the selling system.

If you need to...	One of your user roles must include...
Take out Guarantor Contract Take out MultiLender Contract	Guarantor Secondary Marketing Officer (SMO)
View Contract Pipeline View Loan Pipeline	Pipeline
Add Loans to Contract Remove Loans from Contracts Price Loan Against Contract Search for Contracts	Secondary Analyst
Import Loans Import from LP Customize Import Formats Modify Loans Delete Loans Search for Loans Create new Loans	Loan Manager

If you need to...	One of your user roles must include...
Review Certification Issues View Evaluation Issues Clear Loan Edits/Evaluate Loans Enter Settlement Details Create/View Certification Forms View Settlement Statements Search for Loans Search for Contracts Designate a Warehouse Lender	Closer/Shipper
Select wire instructions for the contract Assign each wire instruction a specific dollar amount or set to increase as the security amount on the contract increases Remove security wire transfer instructions	Security Wire Assignor
Create security wire instructions Modify the effective and expiration date of an already existing security wire instruction Delete security wire instructions	<p style="text-align: center;">Setup Administrator</p> <p style="text-align: center;">You cannot be the Setup Administrator if assigned the Setup Manager user role.</p>
Approve security wire instructions Reject security wire instructions	<p style="text-align: center;">Setup Manager</p> <p style="text-align: center;">You cannot be the Setup Manager if assigned the Setup Administrator user role.</p> <p style="text-align: center;">You must be an authorized person on your certificate of incumbency to be designated as the Setup Manager.</p>
View Freddie Mac's Exclusionary List	Exclusionary List

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