



The Selling System User IDs and Roles Form CASH Only

Seller/Service's Responsibility for Management of Access to the Freddie Mac Selling System - Seller/Service shall be responsible for safeguarding passwords and PIN numbers, and for adopting security measures to prevent their loss, theft or unauthorized disclosure or use. Seller/Service must notify Freddie Mac within 48 hours of an employee's termination in order to promptly revoke the employee's password. Seller/Service shall also notify Freddie Mac immediately in the event of any loss, theft or unauthorized disclosure or use of Seller/Service's employee's User IDs, passwords, PIN numbers or other access codes. Seller/Service shall also notify Freddie Mac immediately if Seller/Service has reason to believe that its access to the Freddie Mac Selling System is no longer secure for any reason. Seller/Service shall be responsible for any liability, loss, or damage resulting from Seller/Service's breach of security or any and all unauthorized use of or access to the Freddie Mac Selling System.

Instructions

The following information is provided to assist you in completing the attached Selling System User ID Form. To avoid delays and errors please ensure information is legible. On the following page, complete the following sections:

1. **Contact Information** – Provide complete contact information for the individual authorized to receive all user IDs and passwords.
2. **Seller/Service Profile** – include all information required for setup. Please note: setup will not be complete until all required paperwork has been received, including:
 - Completed User ID & Roles form
 - Original Form 483

The following paperwork is also required for setup if applicable:

- Form 960: To establish a Concurrent Transfer of Servicing
 - Form 987E: Wire Transfer Authorization for a Warehouse Lender
 - Forms 1035 / or 1035A: For Custodial arrangements (If not utilizing Freddie Mac's Document Custodial Services)
3. **User Information** – Include New User's Full Name, Email and Phone number
 - **Add/Modify** – Check this box if you are adding a new user or modifying an existing user. Also check this box if you are changing which user roles a user is assigned.
 - **Delete** – Check this box if you are deleting a current user.
 4. **Select appropriate User Role(s)** – For each user: Place an **X** in the box next to the user role that needs to be added or deleted.
 - Loan Manager – Members of this group can create and modify a loan. Members of this group, by either importing data or manually entering data, can create loans in the system.
 - Secondary Analyst – Members of this group can pair-off contracts. They can also allocate and de-allocate loans and request a Seller specific rate sheet or shop for a price.
 - Closer/Shipper – Members of this group can enter settlement parameters, designate the Warehouse Lender, execute and clear loan edits, view/print the settlement statement, view funding details and approve/disapprove (validate) proposed certification changes.
 - Secondary Marketing Officer (SMO) – Members of this group can create contracts and request/accept/reject a contract price and view the Exclusionary List.
 - Pipeline – Members of this group can use the View Settlement Pipeline functionality.
 - Exclusionary List – Members of this group can view the Freddie Mac Exclusionary List
 5. **Fax the completed form** to Selling System Customer Setup at 703/738-1532.
 6. The authorized individual will receive (via UPS) all requested User IDs & Passwords within 5 - 7 business days.

Fax completed form to Selling System Customer Setup at 703-738-1532



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Please check one:	<input type="checkbox"/> New Customer (First Time Setup)	<input type="checkbox"/> Existing Customer (Modifying users)
Seller/Service Name		Seller/Service #(s)

Please provide the name and address of the authorized employee who should receive all of your users' IDs and passwords. This employee will also be responsible for identifying other authorized employees as users (and their roles) and adding and deleting employees as users when changes are necessary.

Contact Name:	Title:	
Address:		
City/State/Zip:		
Phone:		
Fax:		
Email:		

Seller/Service Profile: Please complete this section *only* if you are not set up on the Selling System

Seller or Seller/Service:	<input type="checkbox"/> Seller/Service or <input type="checkbox"/> Seller only	
Concurrent Transfer of Servicing (CTOS)	<input type="checkbox"/> Check here only if CTOS is required <i>(A completed form 960 is required)</i>	
Use a Warehouse Lender	Yes <input type="checkbox"/> No <input type="checkbox"/> <i>(If Yes, complete the Form 987E)</i>	
Custodial Arrangement	Freddie Mac (DCS) <input type="checkbox"/> / Self-Custodian <input type="checkbox"/> / Third Party Custodian <input type="checkbox"/> <small><i>(If you are a Self Custodian, approval and Form 1035 are required. 1035A must be completed if utilizing a Third party custodian)</i></small>	
Expected Execution Path:	% ___ Fixed Rate vs. ___ ARM % ___ Cash / % ___ Guarantor	If Cash: % ___ Released / % ___ Retained % ___ Best Efforts / % ___ Mandatory

Add/Modify	Delete	USER NAMES AND EMAIL ADDRESSES: <small><i>(Attach additional sheets if necessary.)</i></small>	PIN birthdate <small>(e.g. July 4th = 0704)</small>	User Role(s): <small>Please see instructions for more information on the User Roles.</small>
<input type="checkbox"/>	<input type="checkbox"/>	Name: Email: Phone:	□ □ □ □	<input type="checkbox"/> Loan Manager <input type="checkbox"/> Secondary Mktg Officer <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Exclusionary List
<input type="checkbox"/>	<input type="checkbox"/>	Name: Email: Phone:	□ □ □ □	<input type="checkbox"/> Loan Manager <input type="checkbox"/> Secondary Mktg Officer <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Exclusionary List
<input type="checkbox"/>	<input type="checkbox"/>	Name: Email: Phone:	□ □ □ □	<input type="checkbox"/> Loan Manager <input type="checkbox"/> Secondary Mktg Officer <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Exclusionary List

The undersigned authorized employee of the Seller/Service hereby authorizes the employees listed above to have access to Freddie Mac's Selling System in accordance with the selected user roles above. The undersigned also agrees that Seller/Service shall be responsible for safeguarding the access to the Freddie Mac Selling System as set forth in Section 1.3(g) of the Freddie Mac Seller/Service Guide. In addition, the undersigned agrees that a facsimile copy of this signed form received by Freddie Mac shall be deemed to be an original and shall bind Seller/Service as if Freddie Mac had received the original signed paper form.

Authorized Signature: _____ Please Print Name: _____
 Title: _____ Date: _____

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