



## The Selling System User IDs and Roles Form Guarantor & Cash

**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. **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.
3. **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.

User Role	Type of Access	Execution	
<b>Cash SMO (Secondary Marketing Officer):</b>	Members of this group can create Cash contracts and request/accept/reject Cash contract pricing. Members of this group can view the Freddie Mac exclusionary list.	<b>Cash</b>	
<b>Swap SMO (Secondary Marketing Officer):</b>	Members of this group will have the ability to take out a Guarantor contract against a Master Commitment. Members of this group can view the exclusionary list.	<b>Guarantor</b>	
<b>Pipeline:</b>	Members of this group can use the View Settlement Pipeline functionality.	<b>Both</b>	
<b>Secondary Analyst:</b>	Members of this group can pair-off contracts, allocate and de-allocate loans to a contract and request a Seller specific rate sheet.	<b>Both</b>	
Note: Users can have only one of these roles <div style="font-size: 2em; margin-left: 10px;">}</div>	<b>Setup Administrator</b>	Members of this group are able to create/edit/delete seller's Security Wire Instructions. Members of this group cannot have <b>Setup Manager</b> role.	<b>Guarantor</b>
	<b>Setup Manager</b>	Approves security Wire Transfer Instructions for Guarantor. Members of this group cannot have <b>Setup Administrator</b> role.	<b>Guarantor</b>
<b>Security Wire Assigner</b>	Members of this group can assign/remove Security Wire Instructions used for their Guarantor contracts	<b>Guarantor</b>	
<b>Loan Manager</b>	Members of this group can create and modify a loan by either importing data or manually entering data into the system	<b>Both</b>	
<b>Closer/Shipper</b>	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.	<b>Both</b>	
<b>Exclusionary List</b>	Members of this group can view the Freddie Mac Exclusionary List	<b>Both</b>	

4. **Fax the completed form** to Selling System Customer Setup at 703/738-1532.
5. The authorized individual will receive (via UPS Overnight mail) all requested User IDs & Passwords within 5 - 7 business days.

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



## The Selling System User IDs and Roles Form Guarantor & Cash

<b>Seller/Service Name</b>	<b>Seller/Service # (s)</b>
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.	
<b>Contact Name:</b>	<b>Title:</b>
<b>Address:</b>	
<b>City/State/Zip:</b>	
<b>Phone:</b>	
<b>Fax:</b>	
<b>Email:</b>	

Add/Modify	Delete	USER NAMES AND EMAIL ADDRESSES: <i>(Attach additional sheets if necessary.)</i>	PIN Must be in the format of a date (e.g. July 4th=0704)	User Role(s): Place D or A in appropriate boxes. D=Delete user role    A=Add user role <i>Choose more than one role as needed. Note: Users cannot have both Setup Administrator and Setup Manager roles.</i>
<input checked="" type="checkbox"/> Sample	<input type="checkbox"/> Sample	Name: Chris Sample Email: Sample@sample.com Phone: 212-555-1234	0 7 0 4	<input type="checkbox"/> Cash SMO <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Security Wire Assigner <input type="checkbox"/> Swap SMO <input type="checkbox"/> Loan Manager <input type="checkbox"/> Setup Administrator <b>OR</b> <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Setup Manager <input type="checkbox"/> Exclusionary List
<input type="checkbox"/>	<input type="checkbox"/>	Name: Email: Phone:	□ □ □ □	<input type="checkbox"/> Cash SMO <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Security Wire Assigner <input type="checkbox"/> Swap SMO <input type="checkbox"/> Loan Manager <input type="checkbox"/> Setup Administrator <b>OR</b> <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Setup Manager <input type="checkbox"/> Exclusionary List
<input type="checkbox"/>	<input type="checkbox"/>	Name: Email: Phone:	□ □ □ □	<input type="checkbox"/> Cash SMO <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Security Wire Assigner <input type="checkbox"/> Swap SMO <input type="checkbox"/> Loan Manager <input type="checkbox"/> Setup Administrator <b>OR</b> <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Setup Manager <input type="checkbox"/> Exclusionary List
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<input type="checkbox"/>	<input type="checkbox"/>	Name: Email: Phone:	□ □ □ □	<input type="checkbox"/> Cash SMO <input type="checkbox"/> Secondary Analyst <input type="checkbox"/> Security Wire Assigner <input type="checkbox"/> Swap SMO <input type="checkbox"/> Loan Manager <input type="checkbox"/> Setup Administrator <b>OR</b> <input type="checkbox"/> Pipeline <input type="checkbox"/> Closer/Shipper <input type="checkbox"/> Setup Manager <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: \_\_\_\_\_

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