

Loan Selling Advisor® is the Freddie Mac all-in-one solution for pricing, contracting, and loan delivery. This document lists various resources available on Freddie Mac Learning that show how to work with Loan Selling Advisor and/or Freddie Mac, and these icons show what form each resource takes:



Tutorial



Reference Tool



Help



User Guide

Introduction

[Loan Selling Advisor Overview](#). Provides an overview of Loan Selling Advisor, including information on logging on, navigation, user profiles, user roles, and various resources.



[Loan Selling Advisor User Roles for Sellers](#). Explains the various user roles available and the process for getting set up with those roles.



[Selling Mortgages to Freddie Mac Using Loan Selling Advisor](#). Access a robust menu of topics to help you navigate and use Loan Selling Advisor functions and tools. Our step-by-instructions will assist you with creating and pricing contracts under the Cash, Guarantor and MultiLender executions, create and price loans, the delivery process, settlement and/or funding, exporting data and more.



Cash Pricing and Contracting

[Best Practices for Best Efforts Contracts](#). Instructions on using the Modify Best Effort Import functionality, the data required to create a loan or contract using "Quick Loan," and other best practices with a Best Efforts Commitment.



[Cash Contract Data Fields](#). Data field definitions and requirements for entering data when creating all cash contracts: Servicing Retained, Cash-Released XChange, or WAC ARM.



[Servicing Released Premium Adjustment Guide](#). Identifies contract and loan data fields subject to SRP adjustments for mortgages sold through Cash-Released XChange.



[Request Cash Price Sheets](#). Tutorial highlights how to request Freddie Mac Price Sheets for Servicing Retained and Cash-Released XChange contracts, focusing on price sheet results and options.



[Fundamentals of Cash-Released XChange](#). Tutorial highlights fundamentals of Cash-Released XChange process for mortgages sold servicing-released. It focuses on the key steps for taking out a contract and contract fulfillment.



[WAC ARM Cash Contracts](#). Information and tips on selling and delivering Mandatory WAC ARM cash mortgages. **Updated April 2020**



[Best Efforts Contract Option](#). Information on taking out and fulfilling a Best Efforts Contract.



[Pair off Mandatory Cash Contracts](#). A 5-minute tutorial defining a cash pair-off, which identifies the cash contract tolerance and options for pair-offs as well as simulates the pair-off process.



[Purchase Contracts Overview](#). A tutorial overview of Freddie Mac purchase contracts, contract types, and the contract life cycle.



[Mandatory Fixed-Rate, Servicing-Retained CTOS Cash Contracts](#). Learn about the fundamentals of Mandatory, Fixed-Rate, Servicing-Retained or Concurrent Transfer of Servicing contracts.



Guarantor and MultiLender Swap Pricing and Contracting

[Credit Fee in Yield Add-On Pricing](#). The details needed to implement the mandated Gfee, a fee for mortgages sold through the Guarantor and MultiLender Swap programs.



[Guarantor Pricing and Contract Process](#). A tutorial overview of the Guarantor and MultiLender pricing and contract process that contains simulations of the functions you'll use, including importing a contract, using a rate sheet, manually creating a contract, and exporting data.



Loan Data

[Appraisal Data Integration from UCDP to Loan Selling Advisor](#). Describes the process to compare the appraisal data delivered in Loan Selling Advisor with the appraisal data in the Uniform Collateral Data Portal (UCDP).



[Allocating & Pricing Loans](#). Describes how to allocate loans to a contract and how to price those loans against the contract.



[How to Confirm Representation and Warranty Relief in Loan Selling Advisor](#). Instructions on and a simulation of receiving a Collateral Representation and Warranty Relief decision. **Updated March 2020**



[Tips to Confirm Representation and Warranty Relief in Loan Selling Advisor](#). Describes the collateral representation and warranty relief status information, the steps to perform to receive a status and how to view and export the status. **Updated May 2020**



[Create and Modify Loans](#). A tutorial about importing loans and manually entering loans. **Updated March 2020**



[Assessing Loans](#). A tutorial that covers the process for assessing loans, including assessment options, viewing results, and clearing critical errors. **Updated March 2020**



[ULDD Data Delivery Tips](#). Provides guidance on how resolve data delivery errors in Loan Selling Advisor and how to deliver loans with Affordable Seconds. **New**



[Deliver ULDD Phase 3 Data](#). This resource supplements *Guide* Bulletins 2018-1 and 2019-4 addressing the ULDD Phase 3 changes and provides tips for loan delivery through Loan Selling Advisor. You'll learn about important implementation dates, the transition period, the Phase 3 Data Points and more.



[Validating Loan Product Advisor and Non-Loan Product Advisor Loans in Loan Selling Advisor](#). Guidance on troubleshooting and fixing critical error messages received for LP loans.



Pipeline Management and Exporting Data

[How to Use the Loan Pipeline](#). This tutorial provides information on how to use the Loan Pipeline to search for and manage loans. **Updated March 2020**



[How to Use the Contract Pipeline](#). This tutorial provides information on how to use the Contract Pipeline to search for and manage contracts.



[Export Data](#). Learn how to use export data using preset data sets and to create custom data sets through Loan Selling Advisor. This reference contains direct links to a video and a comprehensive mapping document.



Loan Delivery

[Certification Prior to Allocation](#). Information on certifying loans before they are allocated to a contract.



[Delivery Standards for Cash](#). Provides standards for delivering cash contracts.



[Delivery Standards for Guarantor and MultiLender Swap Programs](#). Provides standards for delivering guarantor contracts. **Updated April 2020**



[Documents Freddie Mac Requires for Certification of NY CEMA Deliveries](#). Identifies the documents needed for the certification of NY CEMA Deliveries. **Updated May 2020**



[Form 996E and Form 1034E Document Delivery Flow](#). Describes the flow of settlement documents 996E (Warehouse Provider Release and Transfer form) and 1034E (Custodial Certification Schedule) during the settlement process, highlighting the steps performed by the Seller, Warehouse Lender, Document Custodian, and Freddie Mac.



[Form 996E Tips and Best Practices](#). Learn tips and best practices for preparing and submitting Form 996E to the Warehouse Lender. **Updated April 2020**



[Sell and Deliver Mortgages with Specified Attributes to Freddie Mac](#). Provides instructions and tips on selling and delivering mortgages with specified attributes to Freddie Mac, using Loan Selling Advisor. **Updated March 2020**



[Temporary Loan Delivery Requirements for Mortgages in COVID-19 Forbearance](#). This 15-minute tutorial describes what forbearance is, eligible mortgage types, note and settlement date delivery requirements for delinquent and non-delinquent mortgages, resources and more. **New**



Funding/Settlement: All Executions

[Loan Selling Advisor Settlement/Funding Online Tool](#). Information about Settlement/Funding documents and their availability as well as how the Total Disbursement is calculated.



Funding/Settlement: Guarantor and MultiLender Swap

Freddie Mac Settlement Date Calendars. Quarterly calendars that provide settlement dates under the Guarantor and MultiLender Swap executions. [2nd Quarter 2020](#) [3rd Quarter 2020](#) [4th Quarter 2020](#)



[Understanding the Daily ACH Process](#). Describes the Daily ACH (Automated Clearing House) process for mortgages sold under the Guarantor and MultiLender Swap Programs, which can assist Sellers in tailoring their settlement and reconciliation processes.



Document Custodians

[Using Loan Selling Advisor for Document Custodians](#). Assists document custodians with using Loan Selling Advisor to certify mortgages for Freddie Mac.



[Certifying Mortgages for Freddie Mac](#). Describes the process and options to certify loans.



[Certifying Mortgages for Freddie Mac](#). Describes the methods of certifying a Note, as well as managing the loans during the process.



Warehouse Lenders

[Export and Import Tips for Warehouse Lenders](#). Provides detailed steps for exporting data, and the steps for importing the updated data back into Loan Selling Advisor.



[Using Loan Selling Advisor for Warehouse Lenders](#). Assists warehouse lenders with using Loan Selling Advisor to release and relinquish, transfer and assign to Freddie Mac their rights, title and interest in Pledged Mortgages identified on Appendix 1 (Schedule of Pledged Mortgages) of Form 996E, Warehouse Provider Release and Transfer.



[Warehouse Lender Release and Transfer User Guide](#). Step-by-step instructions for Warehouse Lenders on how to use Loan Selling Advisor to process Form 996E and directly release their interests in Pledged Mortgages to be sold to Freddie Mac.



[Record and Release Pledged Mortgages for Freddie Mac](#). Instructions on how to release and record your interest in a Pledged Mortgage in Loan Selling Advisor. **Updated April 2020**



Correspondent XChangeSM

[Correspondent XChange](#). This 20-minute tutorial provides guidance and instruction on how to use Loan Selling Advisor to create and manage loans you intend to transfer to an Aggregator. You'll also learn how to clear edits, submit loans and manage your Originator Pipeline. **Updated March 2020**



[Correspondent XChange Functionality Manual](#). Step-by-step instructions on how to use and navigate the system. You'll learn how to use the Originator Pipeline to view, evaluate, modify and submit loans to an aggregator. You'll also learn how to view submitted or transferred loans and delete loans from your pipeline. **Updated March 2020**



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