

# New Client Educational Quick Start

## Origination and Underwriting

### Welcome to Freddie Mac!

Freddie Mac Learning has a robust training catalog, including webinars, videos, reference materials, serving thousands of sellers every year. Our training resources are designed to provide the guidance you need to succeed.

### Getting Started

How do I obtain access to Freddie Mac systems?

[Request Access](#) to Access Manager

What do I need to know about Access Manager?

Review these [FAQ's](#)

How do I use the Guide?

- [AllRegs® Online User Guide](#)
- Navigating the Guide with AllRegs® [recorded webinar](#)

Role Based Training

[Loan Officer Processor](#)  
[Underwriter](#)

### Loan Product Advisor®

How does it work?

- [Tutorial](#): Loan Product Advisor: How it Works
- [Online Help Tool](#)

How do I enter a loan?

[Webinar](#): Enhanced Loan Product Advisor Direct Access Data Entry

What is the Feedback Certificate?

[Webinar](#): Redesigned: The Loan Product Advisor Feedback Certificate

Loan Product Advisor [Training Resources](#)

### Underwriting

What is AIM?

Asset and Income Modeler (AIM) [webpage](#)

What is ACE?

Automated Collateral Evaluation (ACE) [webpage](#)

Loan Product Advisor Documentation Matrix

[Quick reference](#) for documenting Loan Product Advisor loans

Underwriter [Training Resources](#)

### Loan Advisor®

Which tools do I need?

- [Loan Advisor Demo](#)
- Loan Advisor Tools – Function & Roles [Quick Reference](#)

How do I access the Loan Advisor tools?

Getting Started with Loan Advisor [webpage](#)

### Products & Offerings

- [Home Possible®](#)
- [HomeOne<sup>SM</sup>](#)
- [Affordable Seconds®](#)
- [Construction Conversion](#)
- [ChoiceHome®](#)

[Access Manager](#)

[Webinar Calendar](#)

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# New Client Educational Quick Start Selling & Delivery

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## Getting Started

How do I obtain access to Freddie Mac systems including, Loan Selling Advisor?

[Request Access](#) to Access Manager

What do I need to know about Access Manager?

Review these [FAQ's](#)

Access Manager [homepage](#)

How do I use the Guide?

- [AllRegs Online User Guide](#)

- Navigating the Guide with AllRegs [webinar](#)

## Loan Selling Advisor®

How does it work?

- Tutorial: [Loan Selling Advisor Overview](#)

- [Online Help](#)

How do I deliver a loan?

- Tutorial: [Create and Modify Loans](#)

- [Delivery Standards for Guarantor and MultiLender Swap Programs](#)

- [Delivery Standards for Cash](#)

Who it's for?

Tutorial: [Loan Selling Advisor User Roles for Sellers](#)

Loan Selling Advisor [Training Resources](#)

## Selling Executions

[Guarantor/MultiLender execution](#)

- [Fixed Rate Guarantor](#)
- [WAC ARM Guarantor](#)
- [MultiLender Swap](#)

[Cash execution](#)

- [Mandatory Fixed Rate](#)
- [Best Efforts Fixed Rate](#)
- [Mandatory WAC ARM](#)

## Servicing-Released XChange<sup>SM</sup>

Cash-Released XChange<sup>SM</sup>  
[Website](#)  
[Tutorial](#)

Co-Issue XChange<sup>SM</sup>  
[Website](#)

Correspondent XChange<sup>SM</sup>  
[Website](#)  
[Tutorial](#)

Simplify servicing transfer with [Freddie Mac Automated Servicing Transfer<sup>SM</sup>](#)

Post Fund Data  
Correction Tool

## Execution Training Tutorials

- [Purchase Contracts Overview](#)
- [Guarantor Pricing and Contract Process](#)
- [Mandatory Fixed-Rate, Servicing Retained CTOS Cash Contracts](#)
- [Best Efforts Contract Option](#)
- [Adjustable Rate Mortgage \(ARM\) ARM Cash Contracts](#)

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# New Client Educational Quick Start Servicing

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## Getting Started

How do I obtain access to Freddie Mac systems?

[Request Access](#) to Access Manager

What do I need to know about Access Manager?

Review these [FAQ's](#)

What is Servicing Gateway?

- [Tutorial](#): Freddie Mac Servicing Gateway and Tools Overview
- [Link](#) to Servicing Gateway

Role Based Training

[Investor Reporting](#)  
[Default Servicing](#)

## Investor Accounting

What are my responsibilities?

Introduction to Freddie Mac Investor Accounting Responsibilities [webinar](#) or [tutorial](#)

How do I report?

Investor Reporting Using Loan Level Reporting [webinar](#) or [tutorial](#)

What are the custodial account reconciliation requirements?

- Understanding Custodial Accounts [Reference Guide](#)
- Custodial Account Reconciliation Tools:
  - [Principal & Interest](#)
  - [Escrow Accounts](#)

## Default Servicing

What is Electronic Default Reporting or EDR?

EDR [tutorial](#) and [quick reference guide](#)

[Default Management](#)

Foreclosure Bankruptcy [Resources](#)

Alternatives to Foreclosure [tutorial](#)

Loss Mitigation [resource document](#)

## Servicer Performance Profile

What is the Servicer Performance Profile?

Visit the Servicer Performance Profile [homepage](#)

Servicer Success Scorecard [tutorial](#)

Manager Series reference guide

Get [SHARP](#) – earn an award for superior servicing!

## Servicing Tools

- [Cash Manager](#)
- [Loan Level Reporting](#)
- [Servicing Transfer Manager](#)
- [EDR](#)
- [Foreclosure Sale Reporting](#)
- [Real Estate Valuation and Pricing](#)
- [Workout Prospector](#)

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