



Financial & Corporate Compliance

Configuring HMDA *Wiz*[®] in Wolters Kluwer Loan Products

ARTA[®] Lending, ComplianceOne[®] Lending,
ComplianceOne[®] /Vanceo[™] Assumptions,
ComplianceOne[®] /Vanceo[™] Mortgage, and
idsDoc/ComplianceOne[®] Plus

Date August 2024

File Configuring Wiz® SaaS Suite in Wolters Kluwer Loan Products

Disclaimer

The contents of this publication, including its appendices, exhibits, and other attachments, as updated or revised, are highly confidential and proprietary to Wolters Kluwer Financial Services, Inc. or its subsidiaries or affiliates (“Wolters Kluwer Financial Services”). This publication is distributed pursuant to a Non-Disclosure Agreement, Evaluation Agreement, License Agreement and/or other similar agreement(s) with Wolters Kluwer Financial Services, Inc. or its subsidiary or affiliate. Unless otherwise specifically provided in such agreement(s), the reproduction of this publication is strictly prohibited. Use and distribution of this publication are also subject to the responsibilities and obligations of such agreement(s), which require confidential treatment of this publication and its contents.

Except only for the warranties (if any) expressly set forth in the agreement(s) under which this publication is provided (i.e., your agreement or license for the described product), this publication is provided “as is”, and Wolters Kluwer Financial Services makes no warranty, express, implied, by description, by sample or otherwise, and in particular and without limitation, makes no implied warranties of merchantability or fitness for purpose. No modifications to this Warranty Disclaimer are authorized unless in writing and signed by the President or a Vice President of the Wolters Kluwer Financial Services entity licensing the product described in this publication.

This publication is intended to provide accurate and authoritative information about the subject matter covered based upon information available at the time of publication. Examples given in this publication are for illustrative purposes only.

Development of this publication and the software (including forms, disclosures, reports, and other documents generated by the software) or other products that it describes was based on Wolters Kluwer Financial Services’ understanding of various laws, regulations and commentaries. Wolters Kluwer Financial Services cannot and does not guarantee that its understanding is correct.

This publication is not intended, and should not be used, as a substitute for legal, accounting, or other professional advice. Wolters Kluwer Financial Services is not engaged in providing legal, accounting or other professional services. If legal or other professional assistance is required, you should seek the services of a competent professional. We encourage you to seek the advice of your own attorney concerning all legal issues involving the use of this publication and any products described in this publication. If your interpretations or your counsel’s interpretations are contrary to those expressed in this publication, you should of course, follow your/your counsel’s interpretations.

The following notice is required by law:

WOLTERS KLUWER FINANCIAL SERVICES’S PRODUCTS AND SERVICES ARE NOT A SUBSTITUTE FOR THE ADVICE OF AN ATTORNEY.

Copyright

Unless otherwise specifically authorized in the agreement or license under which this publication has been provided, no part of this publication may be posted, played, transmitted, distributed, copied or reproduced in any form or by any means, electronic or mechanical, including photocopying, recording, or retaining on any information storage and retrieval system, without prior written permission from Wolters Kluwer Financial Services.

Requests for permission to reproduce content should be directed to Wolters Kluwer Financial Services Corporate Legal Department, by telephone at 1.800.397.2341.

Trademark Rights

All trademarks are the property of their respective owners.

6815 Saukview Drive
St. Cloud, MN 56303
© 2024 Wolters Kluwer Financial Services, Inc.

Contents

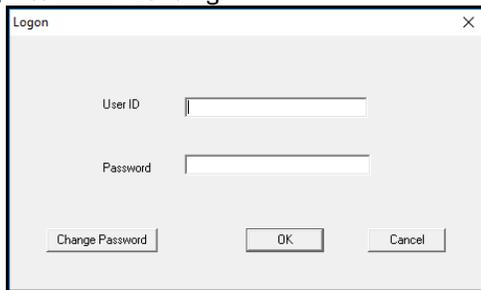
ARTA® Lending	4
ComplianceOne® Lending	5
ComplianceOne® / Vanceo™ Assumptions	6
ComplianceOne® / Vanceo™ Mortgage	7
idsDoc/ComplianceOne® Plus	8

ARTA® Lending

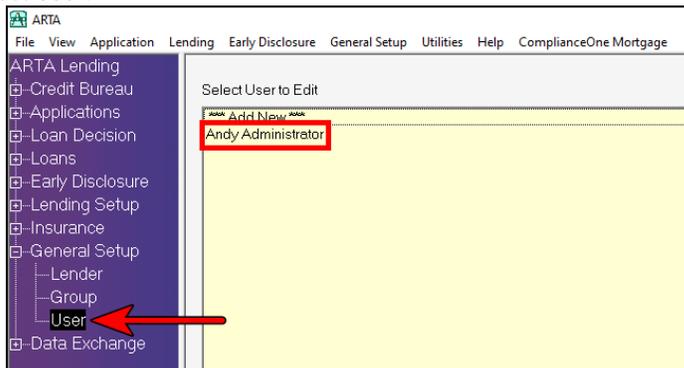
ARTA® Lending users who submit HMDA data to HMDA Wiz® can follow the steps below to update the User name and Password in ARTA® Lending after the Wiz® SaaS Suite 6.3 release.

Please Note: The steps that follow must be performed for each user who submits HMDA data from ARTA® Lending.

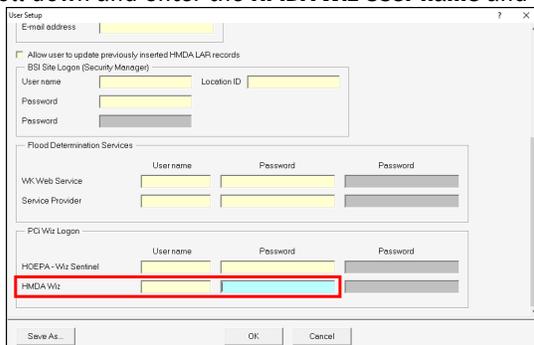
1. Log into ARTA® Lending.



2. Expand **General Setup**.
3. Select **User**.



4. Double-click the user to view the **User Setup** screen.
5. Scroll down and enter the **HMDA Wiz User name** and **Password**.

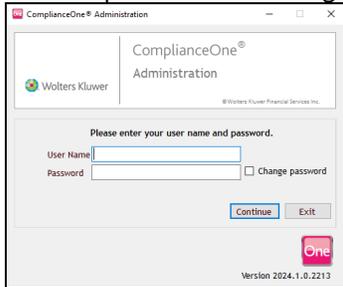


6. Click **OK** to save and exit.
7. Repeat steps 3 – 6 for each user who submits HMDA data.

ComplianceOne® Lending

ComplianceOne® Lending users who submit HMDA data to HMDA Wiz® can follow the steps below to update the UserName and Password in ComplianceOne® Administration after the Wiz® SaaS Suite 6.3 release.

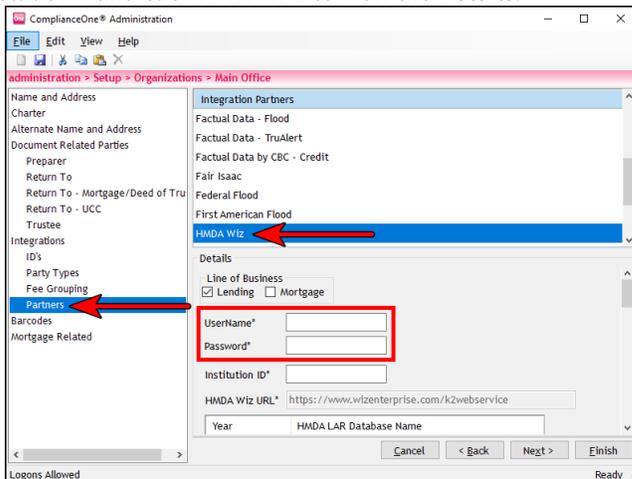
1. Log into ComplianceOne® Lending.



2. On the **Setup** tab, select **Organizations**.



3. Double-click an organization to view the **Setup** screen.
4. Select **Partners**.
5. Scroll down and click **HMDA Wiz** to view the **Details**.



6. Enter the **UserName** and **Password**.
7. The Institution ID is not used but cannot be left blank. Enter a number (i.e. your WK Customer Number).
8. Click **Finish** to save and exit.
9. Repeat steps 3 – 8 for each organization that submits HMDA data.

ComplianceOne® / Vanceo™ Assumptions

ComplianceOne® Assumptions users who submit HMDA data to HMDA Wiz® can follow the steps below to update the Username and Password in Interface Manager after the Wiz® SaaS Suite 6.3 release.

1. Log into ComplianceOne® or Vanceo™ Assumptions.

2. Click **Manage**.
3. Select **Interface Manager** in ComplianceOne or **Interfaces** in Vanceo.

4. Locate and click **HMDA Wiz**.

Name	Type	History
Freddie Mac Loan Product Advisor	Automated/Underwriting	History
Freddie Mac Uniform Loan Delivery Dataset (ULDD)	Export	History
HMDA Wiz	HmdaWiz	History

5. Select **PARAMETERS AND RESOURCES**.

6. Enter the **HmdaWizUser**
7. Hover over the **HmdaWizPassword** row and click the **Edit Password** button to enter the **Password**.
8. Click **Settings** to save the changes.
9. You can close the Interface Manager tab when done.

ComplianceOne® / Vanceo™ Mortgage

ComplianceOne® Mortgage users who submit HMDA data to HMDA Wiz® can follow the steps below to update the Username and Password in Interface Manager after the Wiz® SaaS Suite 6.3 release.

1. Log into ComplianceOne® or Vanceo™ Mortgage.

2. Click **Manage**.
3. Select **Interface Manager** in ComplianceOne or **Interfaces** in Vanceo.

4. Locate and click **HMDA Wiz**.

Name	Type	History
Freddie Mac Loan Product Advisor	AutomatedUnderswriting	History
Freddie Mac Uniform Loan Delivery Dataset (ULDD)	Export	History
HMDA Wiz	HmdaWiz	History

5. Select **PARAMETERS AND RESOURCES**.

6. Enter the **HmdaWizUser**
7. Hover over the **HmdaWizPassword** row and click the **Edit Password** button to enter the **Password**.
8. Click **Settings** to save the changes.
9. You can close the Interface Manager tab when done.

idsDoc/ComplianceOne® Plus

idsDoc and ComplianceOne® Plus users who submit HMDA data to HMDA Wiz® can follow the steps below to update the Username and Password after the Wiz® SaaS Suite 6.3 release.

1. From **Settings** select **Company Settings**.
2. Select **Services** and enter the new **USER NAME** and **PASSWORD**.
3. Click **Save Changes**.

The screenshot displays the 'Company Settings' page. At the top, there is a 'Save Changes' button. Below it, a navigation menu on the left includes 'Global', 'General', 'Company Contacts', 'Lists', 'Loan Contacts', 'Authentication', 'Implementation', 'Field Locks', and 'Services' (which is highlighted with a red box). The main content area is titled 'Company Defaults' and is divided into two sections: 'HMDA' and 'HMDA Wiz'. Under 'HMDA', there are fields for 'LEGAL ENTITY IDENTIFIER (LEI)' and 'FEDERAL AGENCY'. Under 'HMDA Wiz', there are two input fields: 'USER NAME' and 'PASSWORD', both of which are highlighted with a red rectangular box.



wolterskluwer.com