

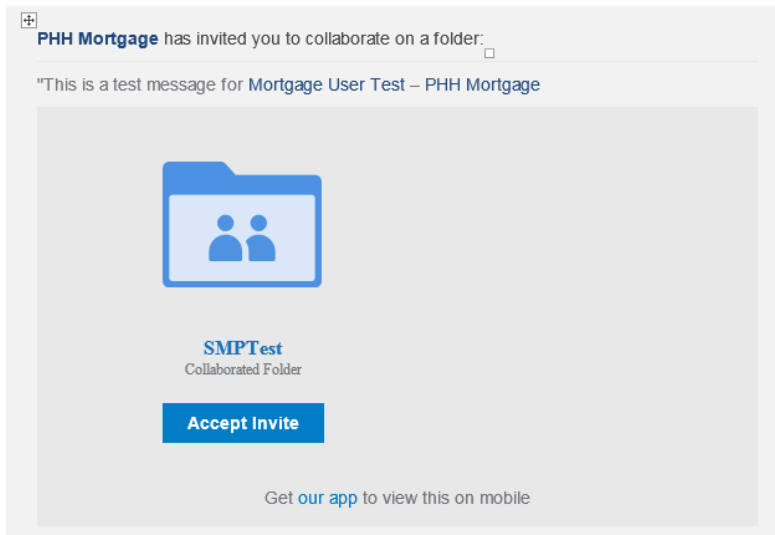
# BOX Login and User Guide

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### Invitation to begin using Box:

User will receive an email invitation. Select “**Accept Invite**” to get started



Once the user accepts the invite, the user will need to complete the registration page and then select **“Submit”**

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**Your Information**

Full Name


Email Address

Password

Confirm Password

Phone Number

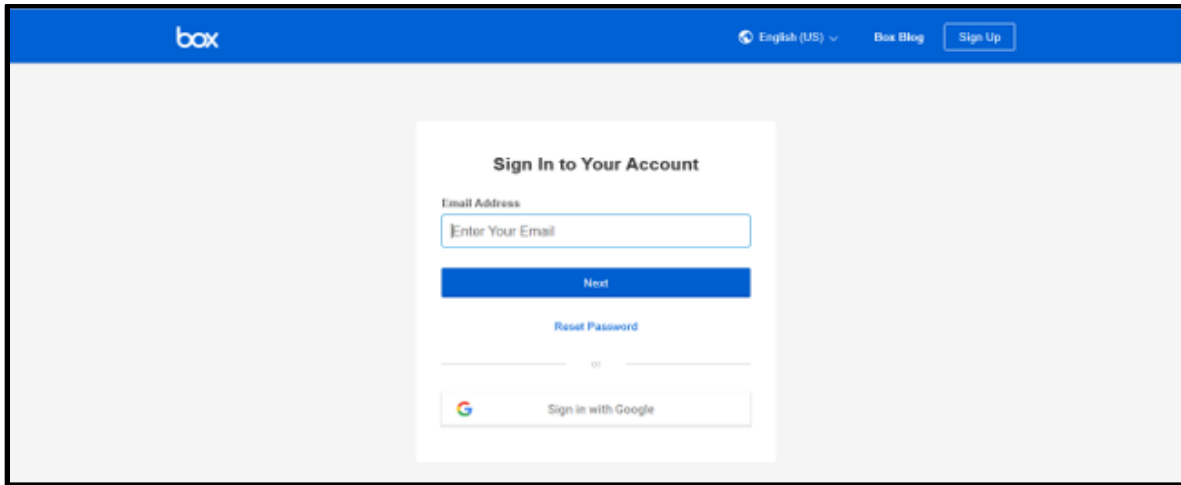
Country

I'm not a robot   
reCAPTCHA  
Privacy - Terms

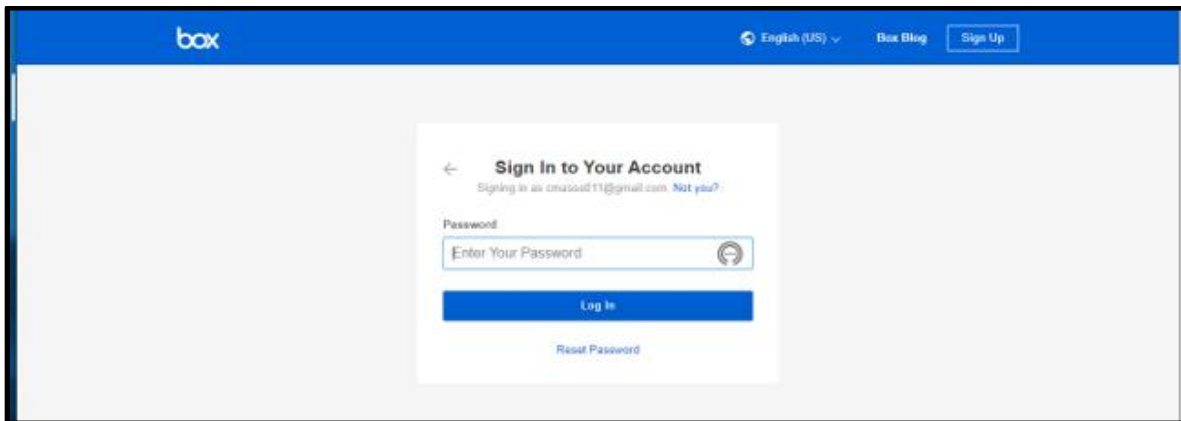
## Accessing Box:

Once registered the user will go to the following URL: <https://account.box.com/login>

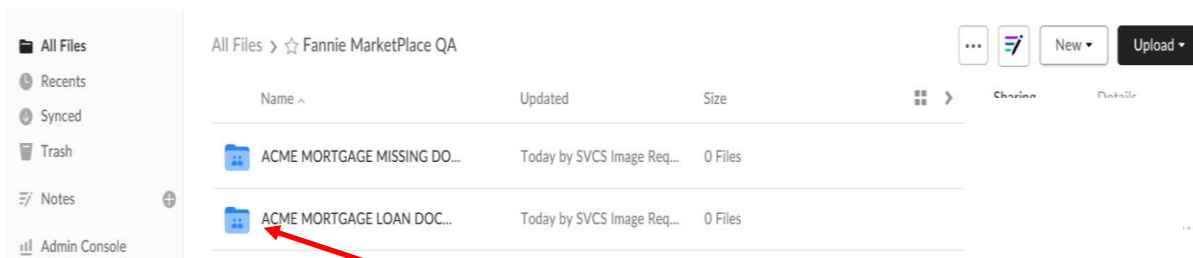
Enter your assigned email address, then select **“Next”**



Enter the password you selected, then select **“Log in”**



Once logged in, your client specific folders will display on the screen. \*Please open the folder before proceeding to your next step.



**Select your assigned folder.**  
**\*It is important that you upload documents within your designated folder. Documents uploaded outside of your folder will not be picked up and placed in your loan files.**

## Document File Types & Naming Conventions:

While there are no file type restrictions within Box however, sellers must adhere to the file type guidelines and naming convention provided below.

### Naming Convention Specifics:

- Images should be delivered within a **zip file**. The zip file naming convention should be **FNMALoanNumber\_mmddyyyyhhmmss\_UniqueID**
  - Maximum number of characters for file name is 70 including file extension
  - FNMA loan number needs to be included as part of the file name
  - All incoming zip files shall contain the image delivery date and time. The date shall be defined as MMDDYYYYhhmmss.
    - **Note: hours, minutes, and seconds are optional**
  - Unique ID is required if there are multiple image files per loan in a single day's transmission.

The unique identifier is used as a differentiator when all other elements of the name are the same.

    - Example could be 1, 2 or 3
  - No special characters or spaces are permitted, with the exception of the underscore "\_", which must be used as a field separator.
- Image files can be sent in .PDF, .pdf, .tif, .tiff, gif or .zip format (not case sensitive)
  - Maximum Individual File Size – 30 MB (per image)
  - Maximum Zip File Size – 300 MB
  - Individual image and those in Zip files must not be password protected

## Required Documents:

PHH will require the following **imaged documents**

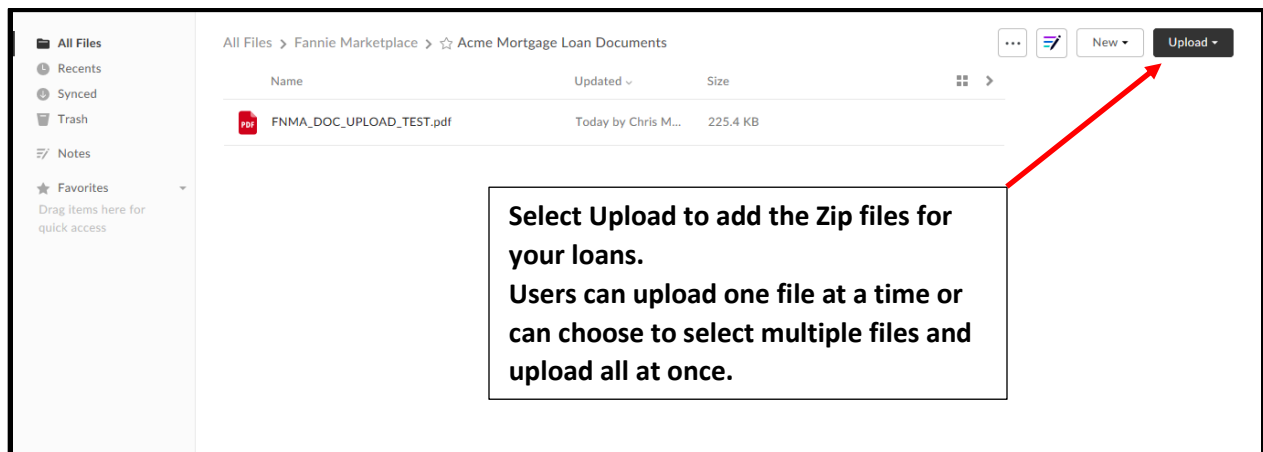
- Goodbye Letter
- Appraisal/Appraisal Waiver
- Survey
- Endorsed Note
- Note Affidavit (If applicable)
- Allonge to Note (If Original Note not Endorsed)
- Recorded Security Instrument (Mortgage or Deed of Trust) including attached legal description
- Security Instrument Rider (Mortgage or Deed of Trust) (If applicable)
- Assignment of Mortgage (If applicable)
- Title Commitment
- Title Policy/Title Insurance
- PMI Certificate
- W-9 or W-8 (for Foreign Nationals)
- Loan Estimate (for applications before 10/3/2015 GFE and early TIL)
- Closing Disclosure (for applications before 10/3/2015 HUD-1 (Executed) and Final TIL)
- Initial Escrow Statement (IEAS)
- Escrow Waiver (if applicable)
- First Payment Letter
- Residential Loan Application, signed (1003)

- Credit Report
- Hazard Insurance Dec Page/Current Hazard Insurance including Condo if applicable.
- Flood Determination Certificate
- Flood Insurance Dec Page
- Servicing Transfer Disclosure Statement
- Signature Card (for LOC's)
- Tax Authorization form (required for NY and NJ loans)
- Underwriting Documents (FNMA Findings, 1008, etc)
- Buydown Agreement (if applicable)
- Notices/evidence that the borrowers received notice of any assignment, sale or the transfer of the servicing of the mortgage loan
- Loans secured by property in state of Maine, closed after January 1, 2018 must be accompanied by Form 3479 if registered with MERS.
- If disclosures to borrower were provided in electronic form, servicer shall provide:
  - (1) Evidence of borrower's "informed consent" as required by E-Sign Act, and
  - (2) Soft copies of all documents provided in this manner with method and date of delivery.

## Uploading Documents:

Once in the appropriate Document folder you will be able to upload the zip files for each loan.

- Select the **“Upload”** button, then select **“File”**
- You can load one file at a time or select multiple files all at once
- Once the files are uploaded to your folder they will remain there until your folder is swept (usually after 10:00pm EST)



**Please note:** Do not log out of the Box application until all of your files have been uploaded as logging out prematurely will result in the files not uploading correctly.

You will know when your files have finished uploading when the **“Uploading”** bar at the bottom of the page reads **“Completed”**.

In Progress:



Completed:



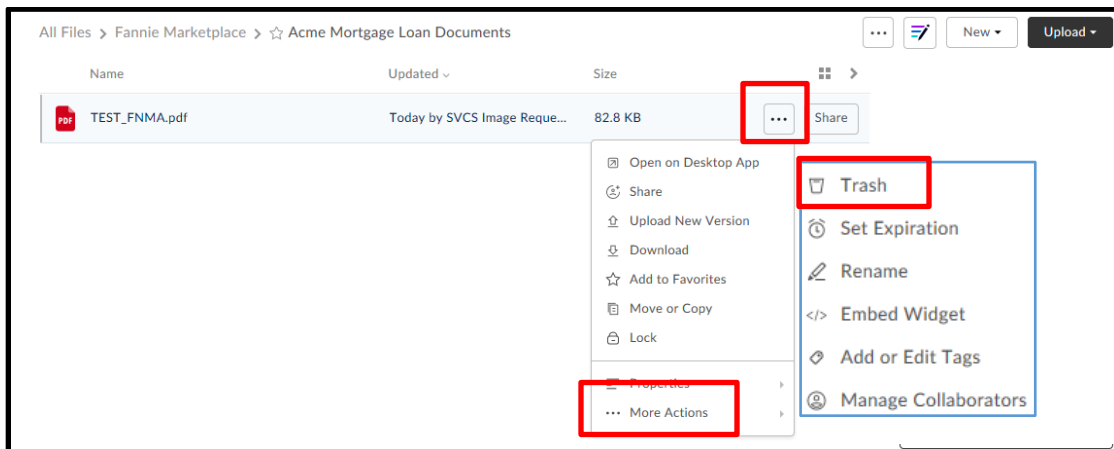
## Duplicate Documents:

If a user adds multiple documents with the same exact name the application will only sweep one of those documents. The other document(s) with the same name will remain in the Seller's folder until such time that the Seller removes the file from the folder.

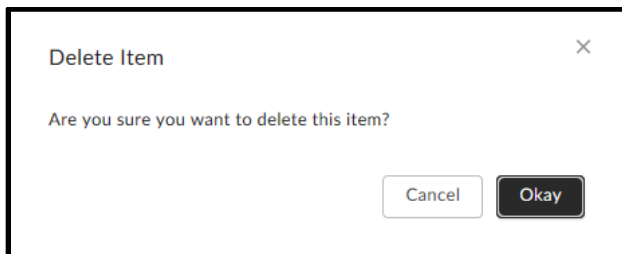
## Removing Documents:

If a document is placed into a folder in error or if the Seller wants to remove a document from the folder prior to the nightly sweep, the user can follow the steps below:

1. Select the button with three dots to the right of the document to be removed, then hover your mouse over **More Actions** and then select **Trash**.



2. The user will be presented with the option of deleting the file, (**Okay**) or canceling the action.



## User Access to Box Applications:

Multiple users from the same organization can upload to Box at the same time provided that they are all logged in as separate users (please do not share accounts or be logged into Box using the same user ID and Password for multiple users at the same time).

If additional user names and passwords are needed please contact your administrator.

## Password Reset:

If you forget your password or simply want to change the password, there is a reset password feature on the login page.

1. Select Reset Password

**Sign In to Your Account**

Email Address

2. Enter your email address

**Reset Password**

Email Address

3. You will receive a message that a password reset link has been sent to your email account.

**We've sent you an email to reset your password**

You will receive an email from us in the next few minutes. Click on the link in the email to change your password.

If you don't see an email from us in your inbox, please check your junk mail folder as it may have been mistakenly categorized as spam or try a different email address.

[Sign In](#)

4. Open up the email and select the password reset link.

Box Your new Box password awaits - Your new Box password awaits You recently requested to reset your... 11:33 AM

5. Enter and confirm your new password

**Reset Password**

New Password

Confirm Password

6. Sign in using your new password

**Sign In to Your Account**

Your password was changed. Please log in.

Email Address