



# Easy Transfer Quick Start Guide

September 2024





# Easy Transfer Quick Start Guide

The new Servicing Marketplace® Easy Transfer feature leverages the third-party, web-based file transfer application, Box, to enable sellers to transfer loan documents to a servicing buyer in one centralized place. Loan documents can be transferred by dragging and dropping files in a simple, secure process. Once the Early Transfer feature is fully rolled out, this feature will eliminate the need for sellers to manage separate transfer protocols for each servicer with the exception of FINAL DOCUMENTS\*

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**For additional help, contact [SMP Support](#).**

## Request Access

Contact your Corporate Administrator for Fannie Mae Technology Manager to receive access to Easy Transfer.

Technology Manager profile: Servicing Marketplace Easy Transfer

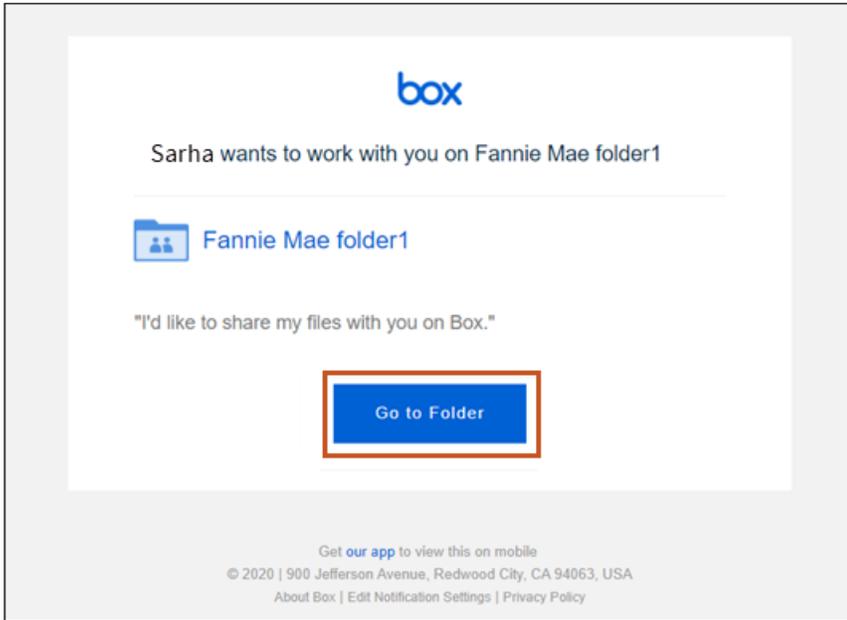
**NOTE:** Any staff that transmits loan documents to servicers can be given access to Easy Transfer.



## First Time Signing into Box

After your Corporate Administrator provides Box access, you will receive an email from **box\_admin@fanniemae.com**.

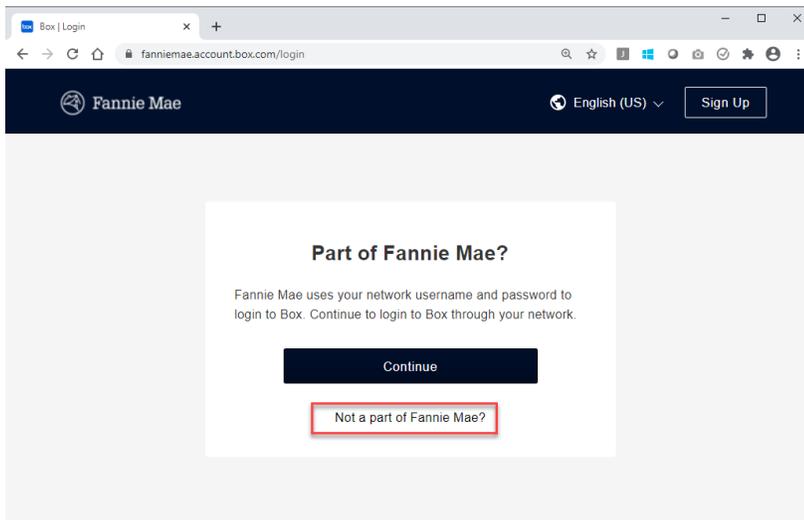
Click the “Go to Folder” link in this email to access Box.



To sign into Box after the first time follow the steps below:

## Signing into Box

1. Click [here](#) to access application.
2. Click “Not Part of Fannie Mae?”





3. Enter: Email Address used to login to Fannie Mae applications.
4. Click Next.

The screenshot shows the Box login interface. At the top, there is a blue header with the 'box' logo on the left, 'English (US)' with a dropdown arrow in the center, 'Box Blog' on the right, and a 'Sign Up' button. Below the header is a white sign-in card with the title 'Sign In to Your Account'. Underneath the title is the label 'Email Address' followed by a text input field containing 'name@company1.com'. Below the input field is a blue button labeled 'Next'. Both the input field and the 'Next' button are highlighted with red rectangular boxes.

5. Enter Password.
6. Click Log In

This screenshot shows the Box login page after the email address has been entered. The browser's address bar shows 'account.box.com/login?redirect\_url=%2F'. The sign-in card now displays a back arrow, the title 'Sign In to Your Account', and the text 'Signing in as name@company1.com. Not you?'. Below this is the label 'Password' followed by a password input field filled with dots. At the bottom of the card is a blue button labeled 'Log In', which is highlighted with a red box. Below the 'Log In' button is a link for 'Reset Password'.

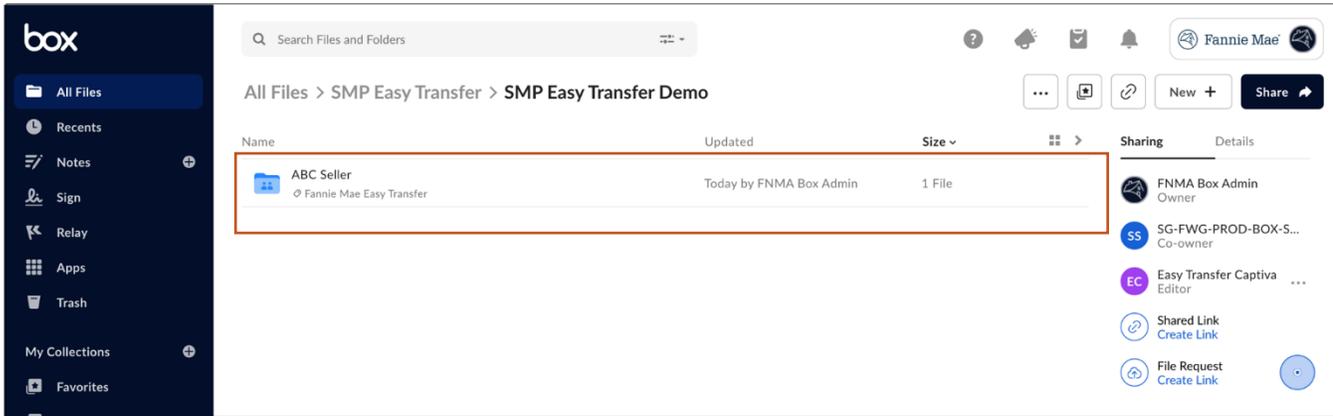


## Transferring Loan Documents to Your Servicing Buyer(s)

From this screen you can move loan documents to servicing buyers quickly and easily by either using the drag and drop option or the file upload option.

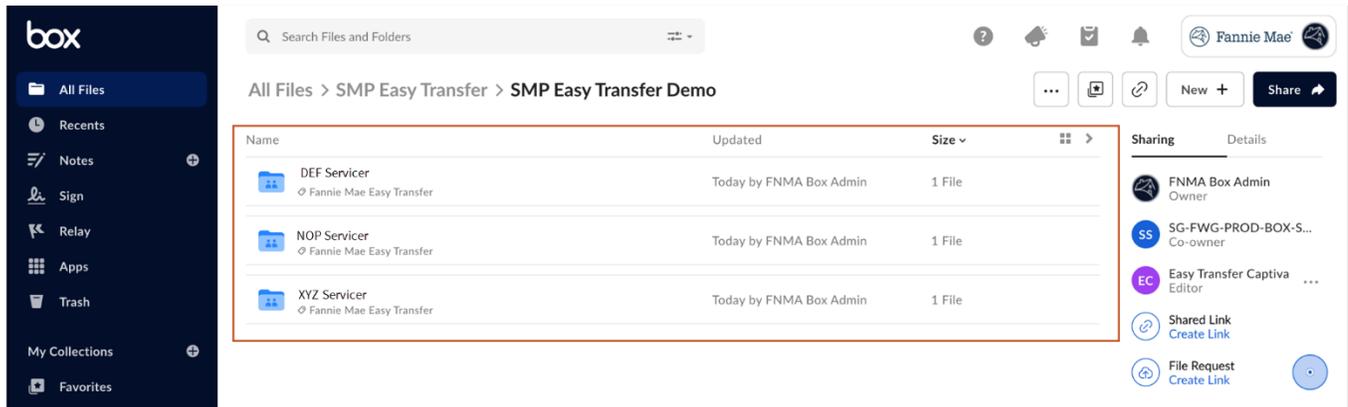
Identify the folder with your seller's name and the Fannie Mae Easy Transfer tag.

**NOTE:** *If you use Box for other purposes, you may see additional folders.*



A list of servicer folders is viewable within your seller folder.

**NOTE:** *Do not begin using Easy Transfer to send loan documents until notified by your servicing buyer.*



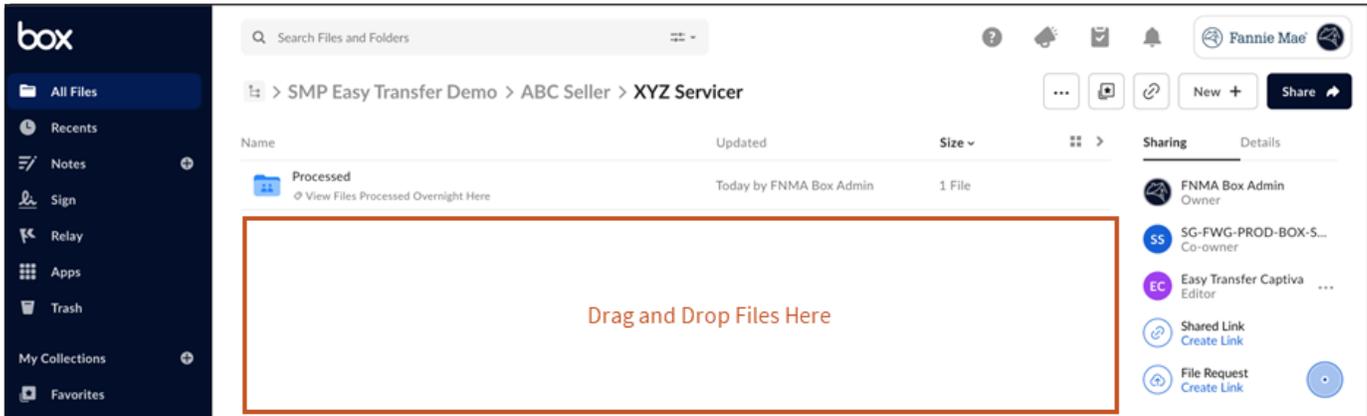


## Option 1: Drag and Drop Files

To transfer loan documents to your servicing buyer using the drag and drop option, follow the steps below.

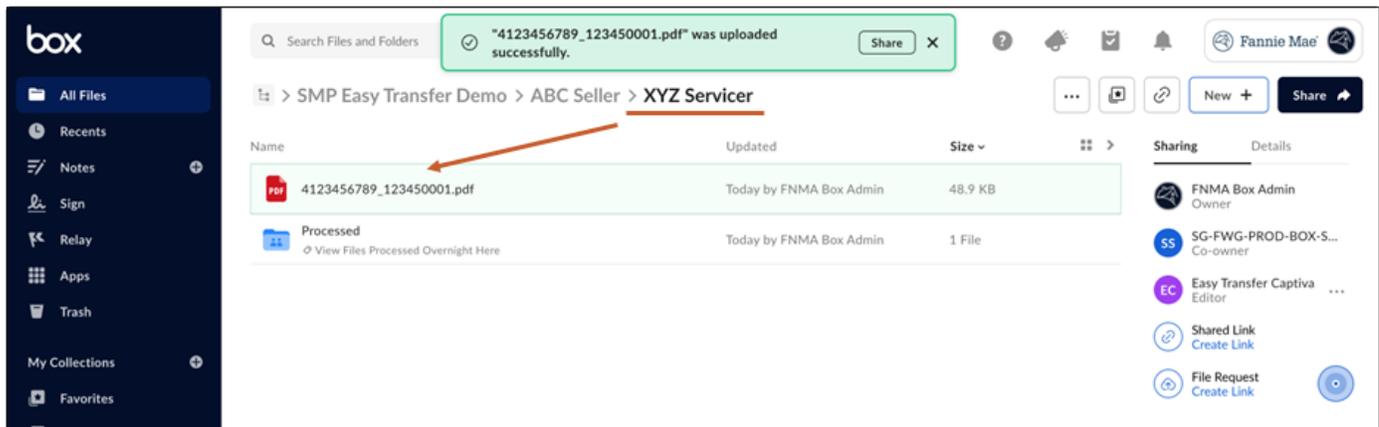
1. Navigate to the servicer's folder.
2. Drag and drop loan document to the white space.

**NOTE:** Only upload PDF files. Any other file format will not be processed.



**NOTE:** In each servicer folder, you will see a Processed folder. Loan documents will appear here once processed overnight. Do not drag and drop files here. Files are purged from the Processed folder every 14 business days.

Upload is complete when the file appears in XYZ Servicer folder.



**NOTE:** Sellers can only move, **not delete**, files once uploaded to Box. To delete files, contact [SMP Support](#).

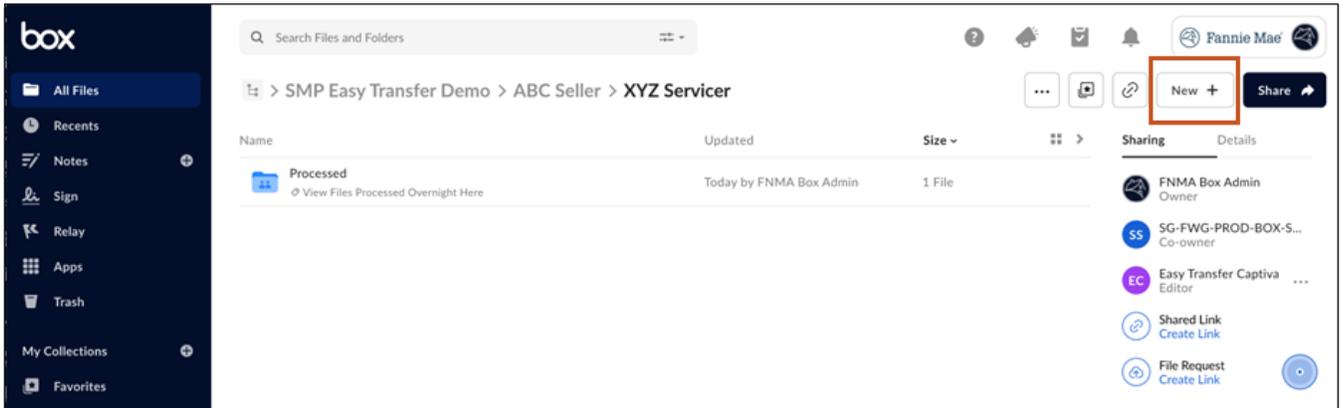


## Option 2: Using the File Upload

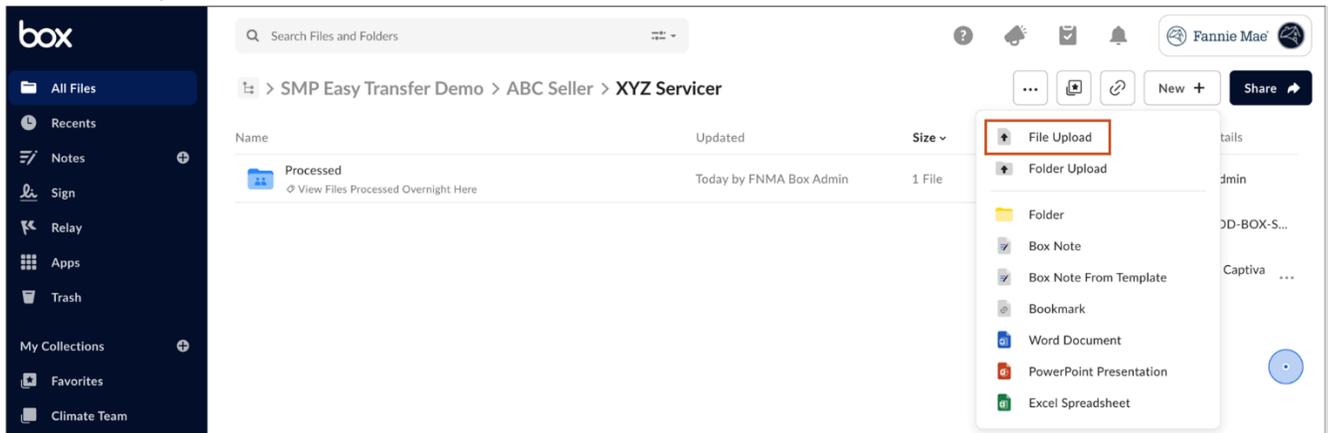
To transfer loan documents to your servicing buyer using the file upload option, follow the steps below.

**NOTE:** Upload **only** PDF files. Any other file format will not be processed.

1. Click “New”.



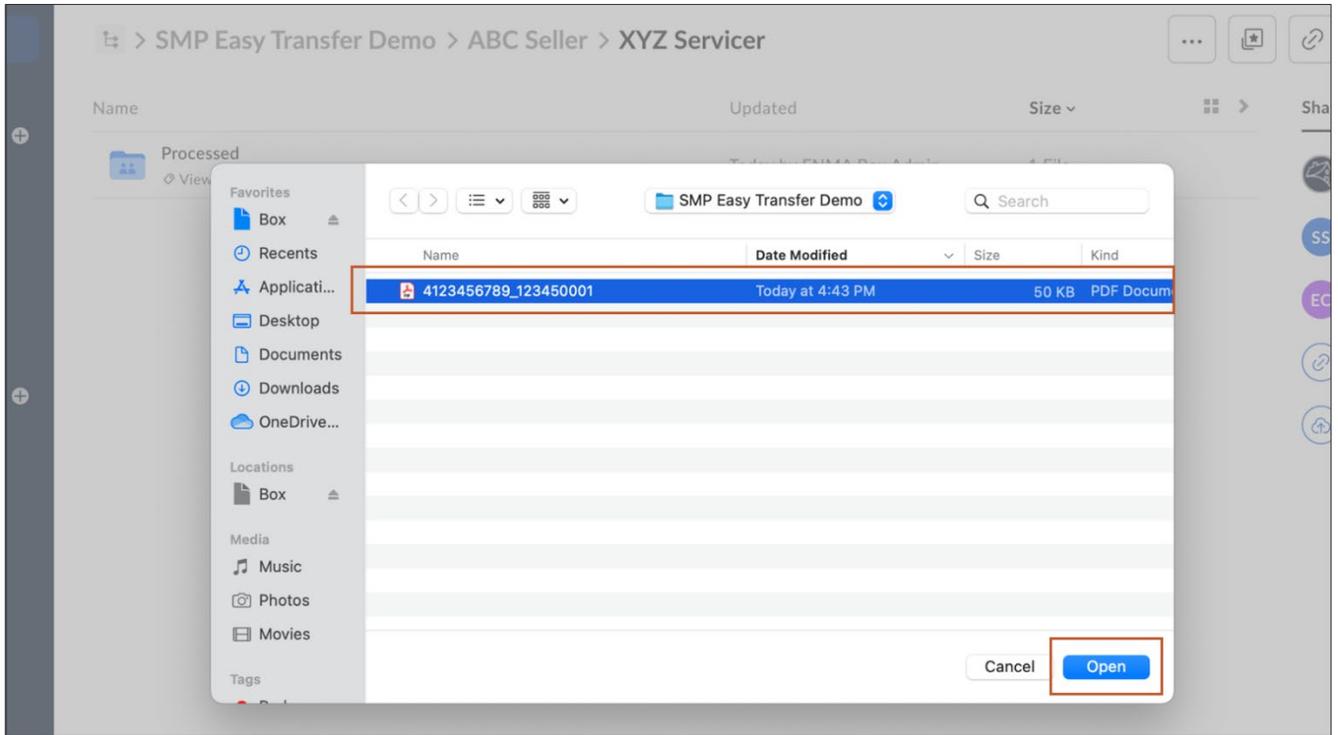
2. Click “File Upload”.



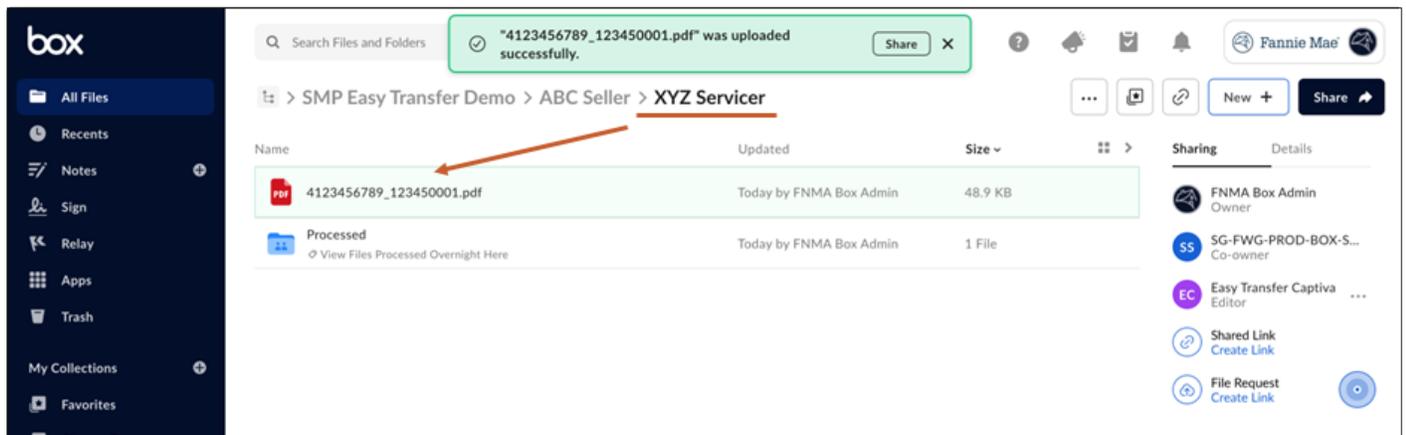


3. Choose Document(s) and Click “Open”.

**NOTE:** See last page of this document for guidance on naming convention.



Upload completes and file appears in XYZ Servicer folder



**NOTE:** In each servicer folder you will see a Processed folder. Loan documents will appear here once processed by Fannie Mae. **Do not drag and drop files to the Processed folder.** Files are purged from the folder by Fannie Mae every 14 business days.



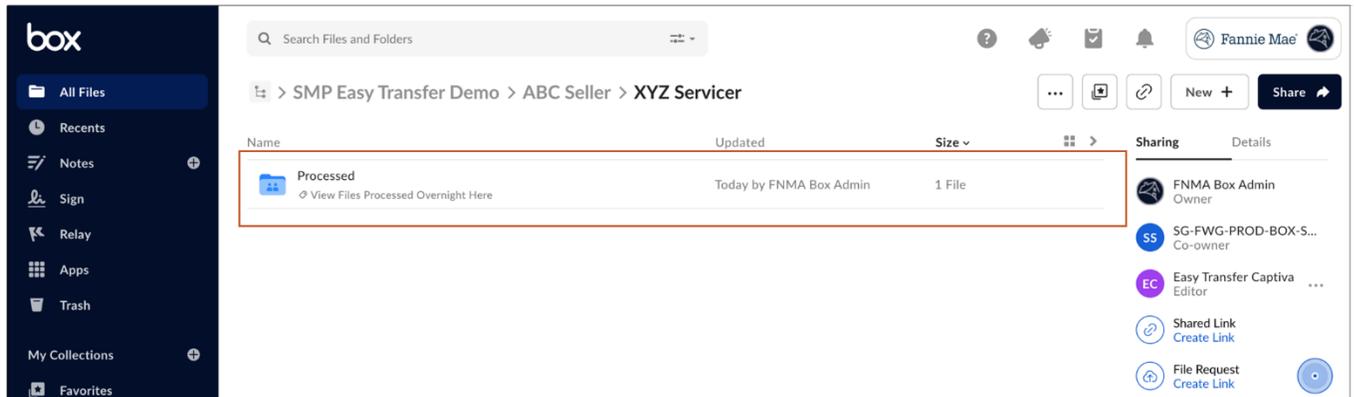
## Confirming Processing of Loan Files

Files uploaded to the “Seller Folder” by 9:00PM EST will be processed overnight and available to the servicer the following business day.

**NOTE:** Files are purged from the Processed folder every 14 business days.

To confirm files were processed follow the steps below:

1. Check the “Processed” Folder the next business day.



2. Click into the “Processed” Folder the NEXT Business Day to view processed files.

**NOTE:** Box will append the file name with a time stamp.





## Easy Transfer Naming Convention

- 10-digit Fannie Mae loan number assigned upon Fannie Mae delivery (e.g. 4123456789)
- Underscore (\_)
- 9-digit Fannie Mae Seller/Servicing Number (SSN) used to commit and deliver.
  - SSID for Traditional SMP with PHH: 172510183
  - SSID for Quick Launch with PHH: 172518656
- Format: 4123456789\_172510183.pdf or 4123456789\_172518656.pdf

When sending **documents omitted from the original loan file submission:**

ex. 4123456789\_172510183\_Missing.pdf (if sending missing docs in a blob file)

ex. 4123456789\_172510183\_First Payment Letter.pdf (example shown if sending an individual document)

### \*Final Documents (Title Policy & Recorded Mortgage)

Sellers will use the PHH Post Closing Application to upload final documents to PHH

Link to the PHH Post Closing Application (PCA) is: <https://postclosing.phhmortgage.com/login>

Please refer to the PCA user guide for upload details