

Seller/Service Approval Process:

Prepare and Submit Documents to Fannie Mae

Thank you for your interest in becoming a Fannie Mae Seller/Service! To facilitate the application process, we have an online file transfer portal (File Transfer Portal) allowing you to upload documents easily and securely.

To submit documents via the FTP, you must first provision access to specific users through Technology Manager. Contact your Fannie Mae Onboarding Specialist for more information about your Technology Manager administrator.

This job aid provides detailed guidance for preparing and submitting documents via the File Transfer Portal (FTP). Contact your Fannie Mae Onboarding Specialist if you need assistance accessing the FTP.

Document Preparation

In order to submit documents via the FTP **all documents** must be submitted as a zip file using the naming convention described below in Step 2. You may submit up to 15 zip files per batch and the batch cannot exceed 750 MB.

Follow the steps below:

1. Name your documents according to the naming convention outlined in the Documentation Checklist.
 - a. Example: 01_Financials_lender name.pdf
 - b. Example: 05_QC Pre-Funding Policy & Procedures_lender name.pdf
 - c. Example: 11_Appraisers Policy & Procedures & Roster_lender name.pdf

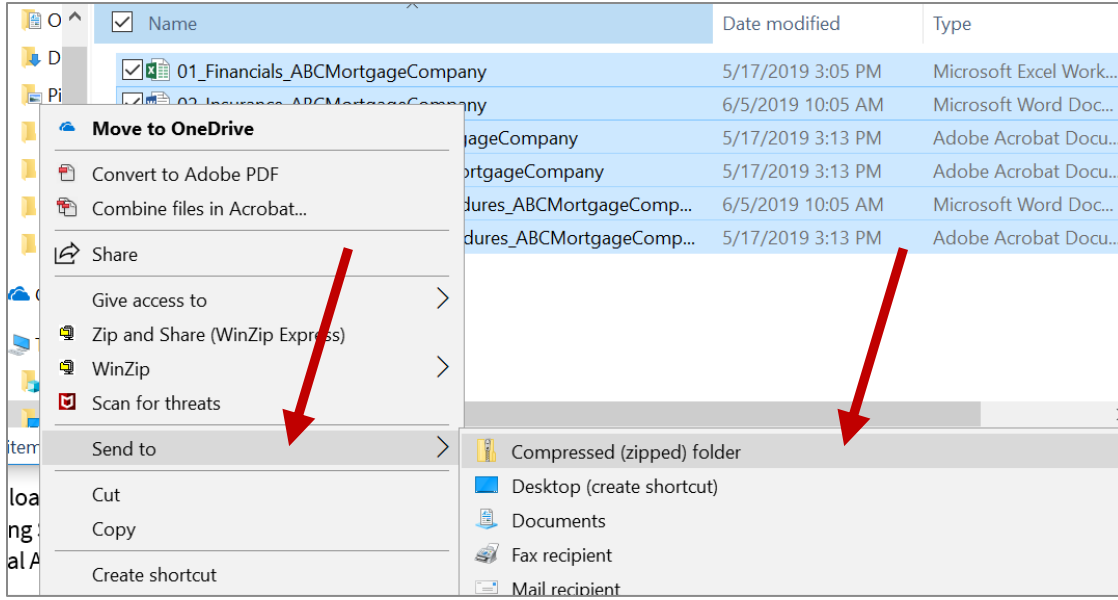
NOTE: Documents **must not** have any password protection or encryption.

2. Create your zip file.
 - a. Locate the document or documents you want to include in your zip file.
 - b. Select the check box next to the document or documents.

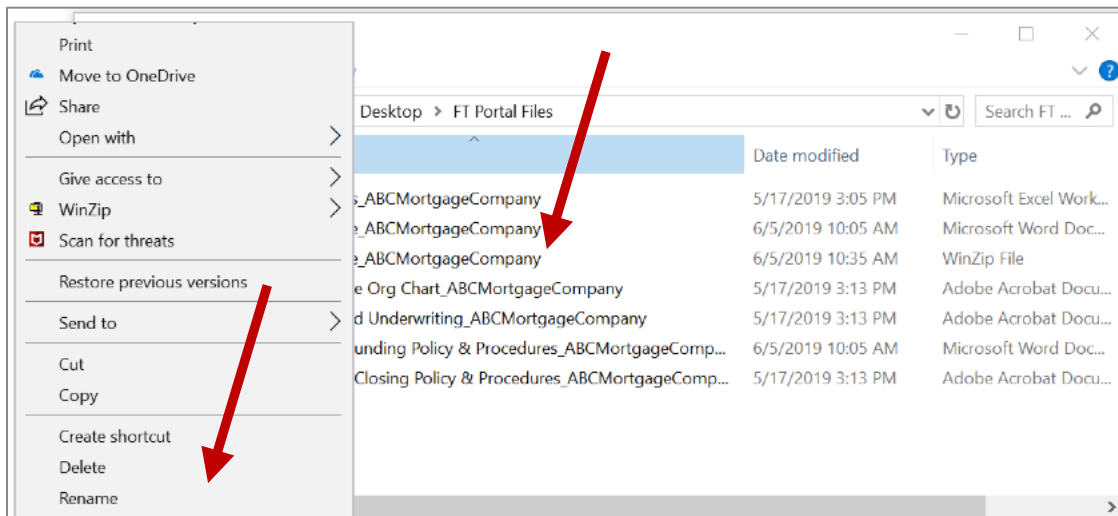
<input checked="" type="checkbox"/> Name	Date modified	Type
<input checked="" type="checkbox"/> 01_Financials_ABCMortgageCompany	5/17/2019 3:05 PM	Microsoft Excel Work...
<input checked="" type="checkbox"/> 02_Insurance_ABCMortgageCompany	6/5/2019 10:05 AM	Microsoft Word Doc...
<input checked="" type="checkbox"/> 03_Corporate Org Chart_ABCMortgageCompany	5/17/2019 3:13 PM	Adobe Acrobat Docu...
<input checked="" type="checkbox"/> 04_Delegated Underwriting_ABCMortgageCompany	5/17/2019 3:13 PM	Adobe Acrobat Docu...
<input checked="" type="checkbox"/> 05_QC Pre-Funding Policy & Procedures_ABCMortgageComp...	6/5/2019 10:05 AM	Microsoft Word Doc...
<input checked="" type="checkbox"/> 06_QC Post-Closing Policy & Procedures_ABCMortgageComp...	5/17/2019 3:13 PM	Adobe Acrobat Docu...

NOTE: Your total batch of zip files cannot exceed 750 MB.

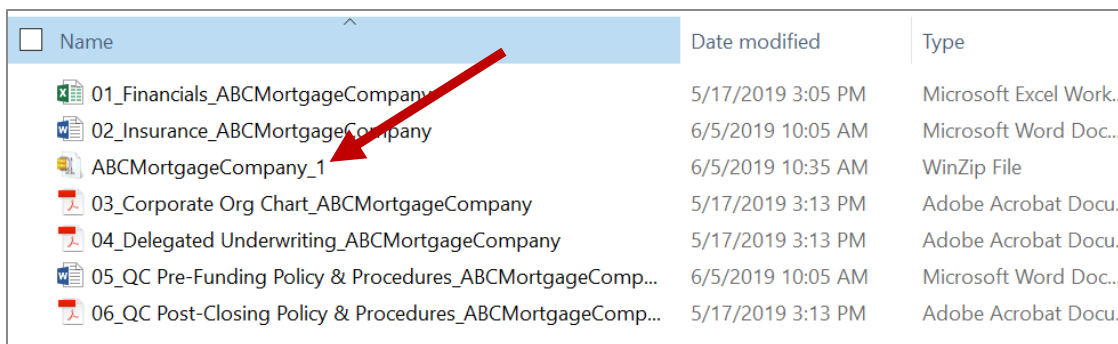
- c. Right click on your document or documents.
 - d. Hover over the arrow to the right of “Send to” and select “**Compressed (zipped) folder**”.



e. Rename the zip file you just created. Right click on the name of the zip file and select rename.



f. Type in the name of your institution, an underscore, and a number if you will be uploading more than one zip file. There cannot be any spaces in the zip file name.



NOTE: Zip files can contain documents in Word, PDF, Excel, or PowerPoint formats. Zip files must not have any password protection or encryption, and the batch of zip files cannot exceed 750 MB.

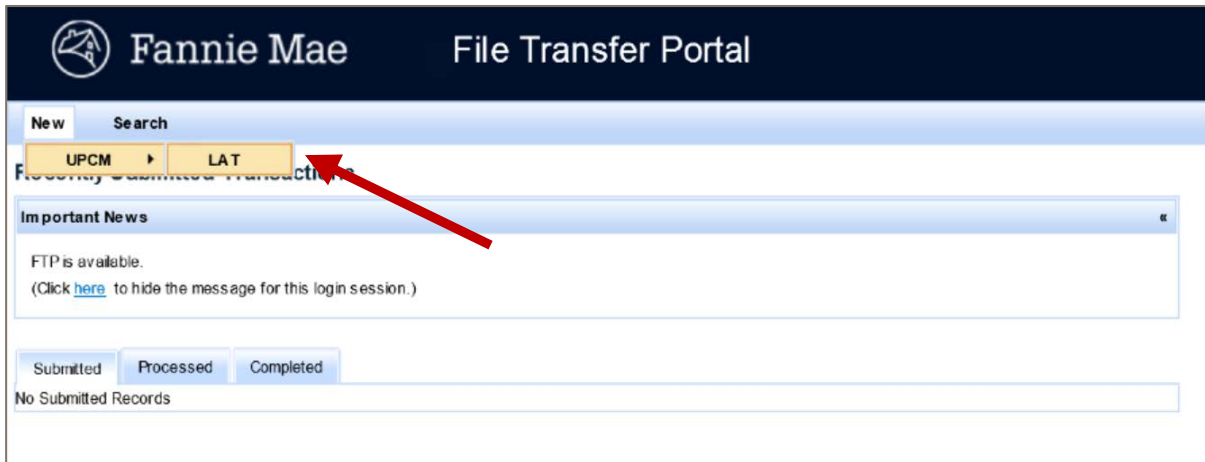


Document Submission

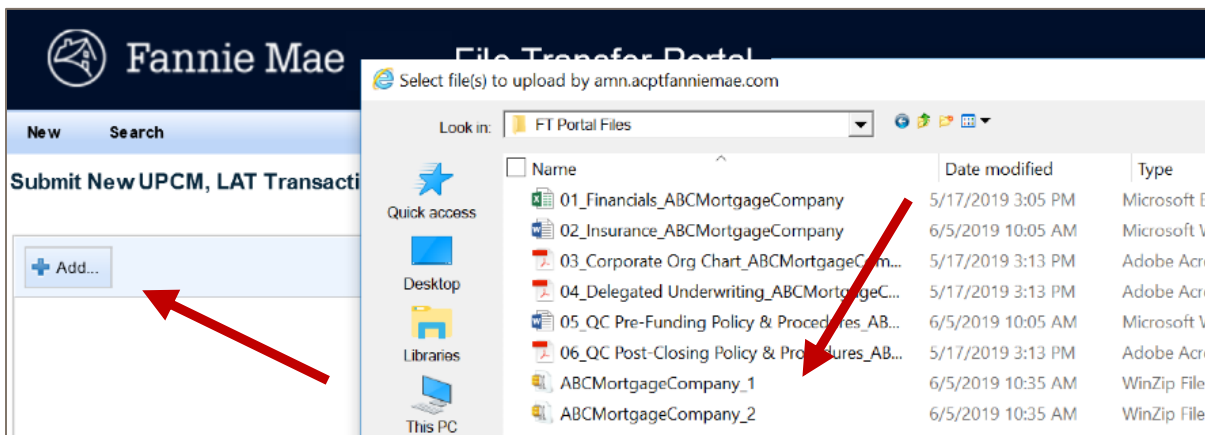
Access the FT Portal at <https://amn.efanniemae.com/Portal>.

Follow these steps to upload documents to the FTP:

1. Use your Fannie Mae credentials to log in.
2. Select “New”, “UPCM”, and “LAT”.



3. Once in LAT, select “+Add” and locate your zip file.



4. Double click the zip file or select the zip file and click “Open” to add the specific zip file.
5. Continue selecting “+Add” until you have added all required zip files.

NOTE: You can include up to 15 zip files in one batch as long as you do not exceed 750 MB for the entire batch.



6. Select **“Upload”**.

The screenshot shows the Fannie Mae File Transfer Portal interface. At the top, there is a dark blue header with the Fannie Mae logo and the text "Fannie Mae File Transfer Portal". Below the header is a light blue navigation bar with "New" and "Search" options. The main content area is titled "Submit New UPCM, LAT Transaction(s)". It features two buttons: "+ Add..." and "Upload". A red arrow points to the "Upload" button. Below the buttons, there is a text input field containing "ABCMortgageCompany_1.zip" and a "Cancel" link. At the bottom, there is a section titled "Uploaded Files Info" which currently displays "No files currently uploaded".

7. Review the **“Uploaded Files Info”** to verify success of upload.

The screenshot shows the Fannie Mae File Transfer Portal interface after a successful upload. The "Uploaded Files Info" section now contains a table with the following data:

Transaction ID	File	Status
1972246	ABCMortgageCompany_1.zip	Upload Successful

A red arrow points to the "Upload Successful" status in the table.



Upload Tips and Best Practices

An authorized FTP user may submit documents following these guidelines.

1. The File Transfer Portal is available for document submissions Monday through Saturday from 9:00 a.m. until 12:00 midnight Eastern time.
2. The system times out after 30 minutes of inactivity.
3. Documents must be uploaded as part of a zip file. You cannot upload individual documents.
4. Documents in the zip file may be in Word, PowerPoint, Excel, or PDF file formats.
5. Upload zip files, in one or more batches with a maximum of 15 zip files per batch and an aggregate total of 750 MB per batch.

Example: First batch upload: ABCMortgageCompany_1 (300 MB) and ABCMortgageCompany_2 (450 MB)

Second batch upload: ABCMortgageCompany_3 (750 MB)

6. A submission will be rejected for the following reasons:
 - A batch exceeds the maximum size
 - Documents or zip files are password protected, encrypted, unreadable, or contain illegible data
 - Documents in the zip files are not in the correct naming convention.
7. For assistance with uploading your zip files dial 1-800-2FANNIE and press 1 then 1.
8. Access the [FTP demonstration](#) to see how the process works.