

Easy Transfer Quick Start Guide

December 2025





Easy Transfer Quick Start Guide

The 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.

Table of Contents

Request Access	2
First Time Signing into Box	3
Signing into Box	3
Setting up Multifactor Authentication	4
Transferring Loan Documents to Your Servicing Buyer(s)	8
Option 1: Drag and Drop Files	9
Option 2: Using the File Upload	10
Confirming Processing of Loan Files	12
Easy Transfer Naming Convention	13

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 Single Sign-on (Preferred Method)

After your Corporate Administrator provides Box access, you will receive an email from noreply@box.com. Click the “Verify Email” link in this email to access Box.



Verify your notification email

The notification email [REDACTED]@fanniemae.com was added to the Box account for E [REDACTED]@fanniemae.com. All future Box notifications will be sent to the notification email address [REDACTED]@fanniemae.com. Please click on the button below to verify your email address.

[Verify Email](#)

If you did not link this email to your Box account, you can disregard this email.

1. Click Log In to open application.



Verify your notification email

Log in to verify the email address that you have specified to receive Box notifications. Once you verify this email address:

- All password, account, comment, and collaboration Box notifications will be sent to this email address instead of your primary email address
- Your primary email address will no longer continue to receive Box notifications
- User notifications preferences set on the primary account would apply to the emails we send out to the notification email
- Any Box notifications sent to a secondary email alias will be sent to the notification email

Log in to your account:

Email/Username: E [REDACTED]@fanniemae.com

[Log In](#) [Forgot password?](#)

[Don't have an account?](#)

Ask your IT administrator to create one for you

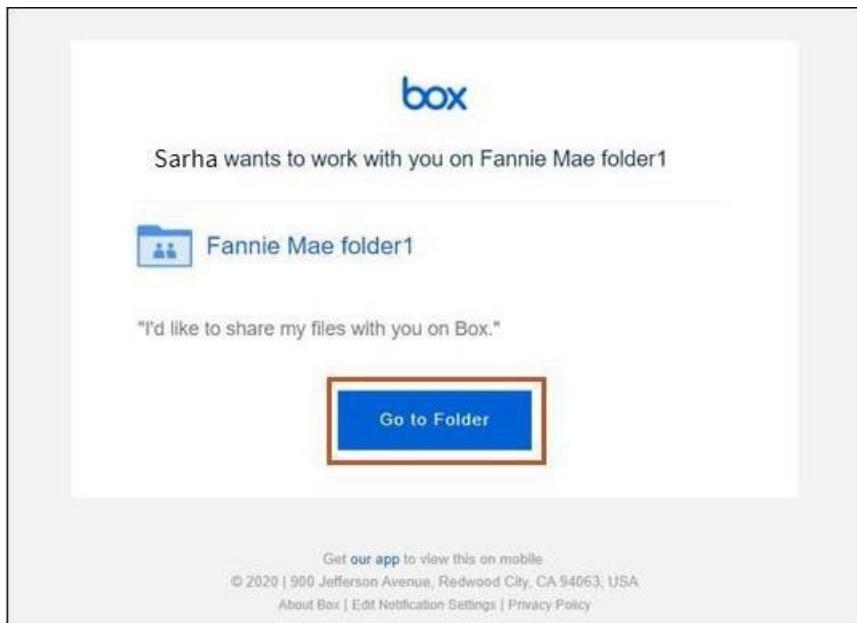
2. Log in using your Fannie Mae ID and password.

The Fannie Mae Sign On page features a dark header with the Fannie Mae logo. The main area is titled "Sign On" and contains two input fields: "USERNAME" and "PASSWORD", both marked with a required asterisk (* REQUIRED). Below the fields is a "Sign On" button. At the bottom of the page is a link for "Need Help With Your User ID or Password?"



First Time Signing into Box (Alternative Method)

After your Corporate Administrator provides Box access, you will receive an email from noreply@box.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 Using Single Sign-on (Preferred Method)

1. Click [here](#) to open application.
2. Select “Continue”.

Part of Fannie Mae?

Fannie Mae uses your network credentials to login to Box. Continue to login to Box through your network.

If you are not a part of Fannie Mae, continue to log in with your Box.com account.

Continue

Not a part of Fannie Mae

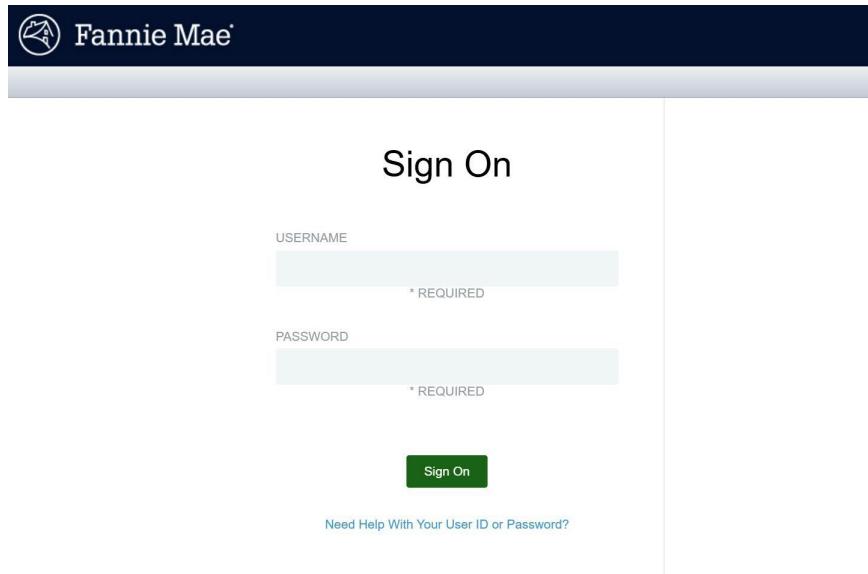
Box for Fannie Mae

Please "Continue" only if your email address is @fanniemae.com
Otherwise, click on "Not a part of Fannie Mae" to login into Box

Support: boxadmin@fanniemae.com



3. Log in using your Fannie Mae ID and password.



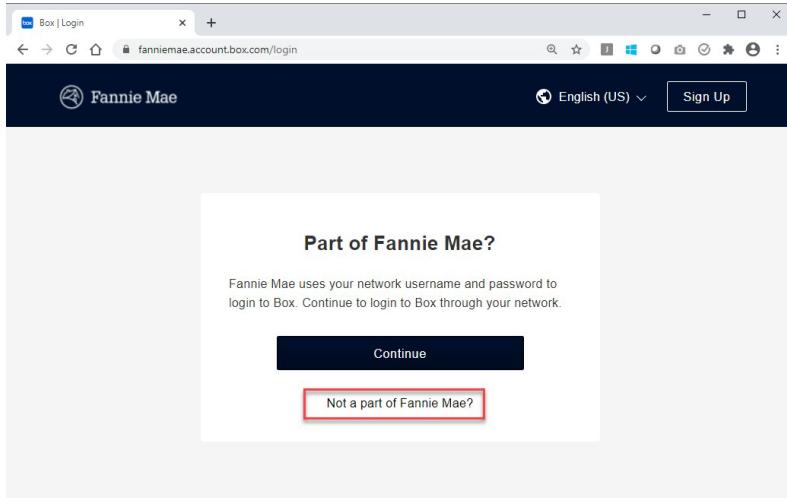
The image shows the Fannie Mae Sign On page. At the top, there is a dark header with the Fannie Mae logo and the word "Sign On". Below the header, there are two input fields: "USERNAME" and "PASSWORD", both marked with a red asterisk indicating they are required. Below the password field is a link "Need Help With Your User ID or Password?". At the bottom is a green "Sign On" button.

4. For assistance with Fannie Mae login issues, please visit the [Technology Support Center](#).

Signing into Box with an existing Box.com account (Alternative Method)

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

 Please note: This login option will be discontinued starting February 2026.



The image shows a browser window for "Box Login" at the URL "fanniemae.account.box.com/login". The page has a dark header with the Fannie Mae logo and a "Sign Up" button. A central modal window is open, titled "Part of Fannie Mae?". It contains the text: "Fannie Mae uses your network username and password to login to Box. Continue to login to Box through your network." Below the text are two buttons: a dark "Continue" button and a red-outlined "Not a part of Fannie Mae?" button.

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



Sign In to Your Account

Email Address
name@company1.com

Next

5. Enter Password.
6. Click Log In.

Box | Login

Sign In to Your Account

Signing in as name@company1.com. [Not you?](#)

Password

Log In

Setting up Multifactor Authentication (MFA)

- 1) Click the **Set up** button for the SMP Easy Transfer/folder.

Action Required

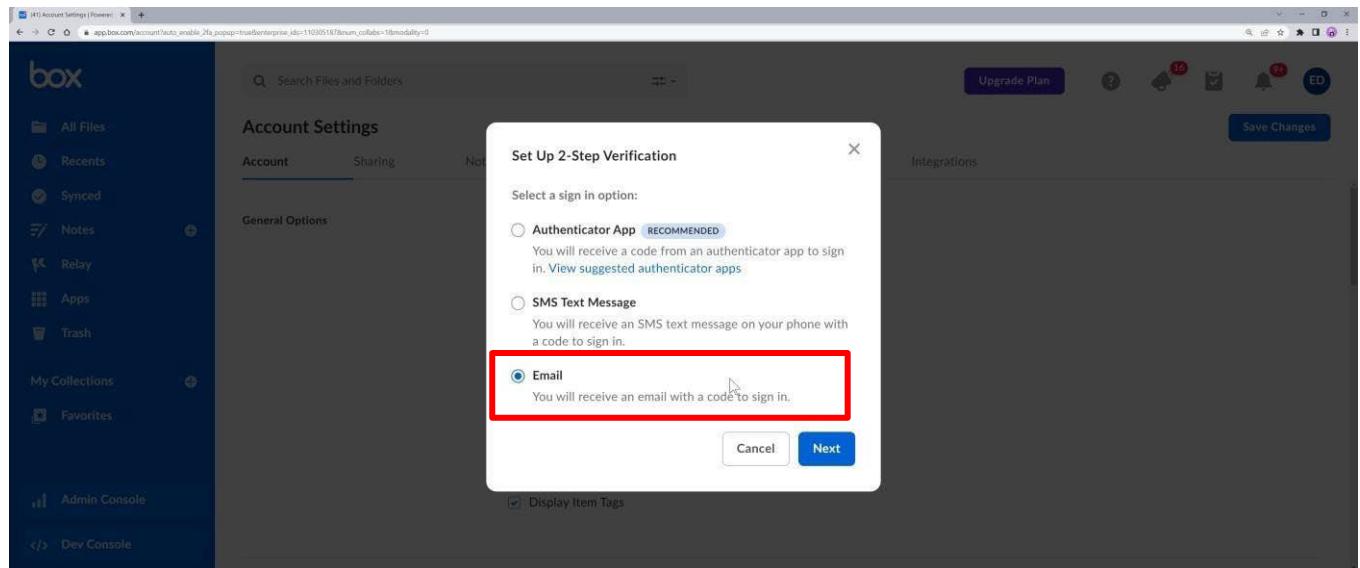
Please complete the following actions to access the folders and files that have been shared with you.

NAME	UPDATED	SIZE
SMP Easy Transfer folder	Two-Factor Authentication Required	Set Up
My personal Box folder	Today by External David	1 File

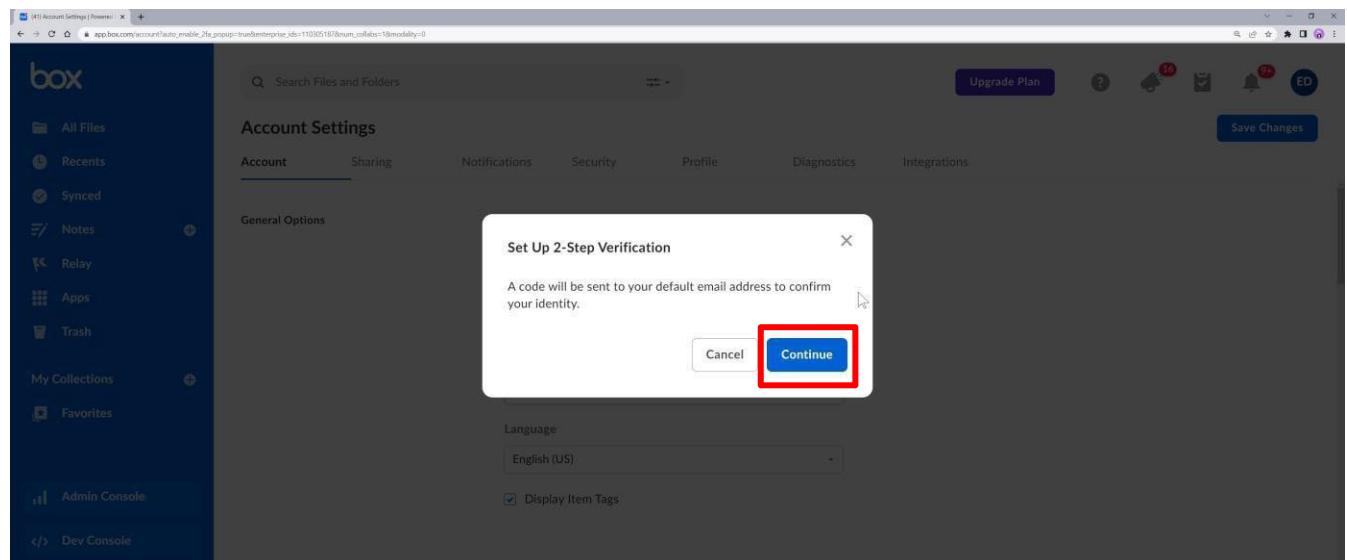
- 2) Select **Email** as the 2-step verification sign in option and click **Next**.



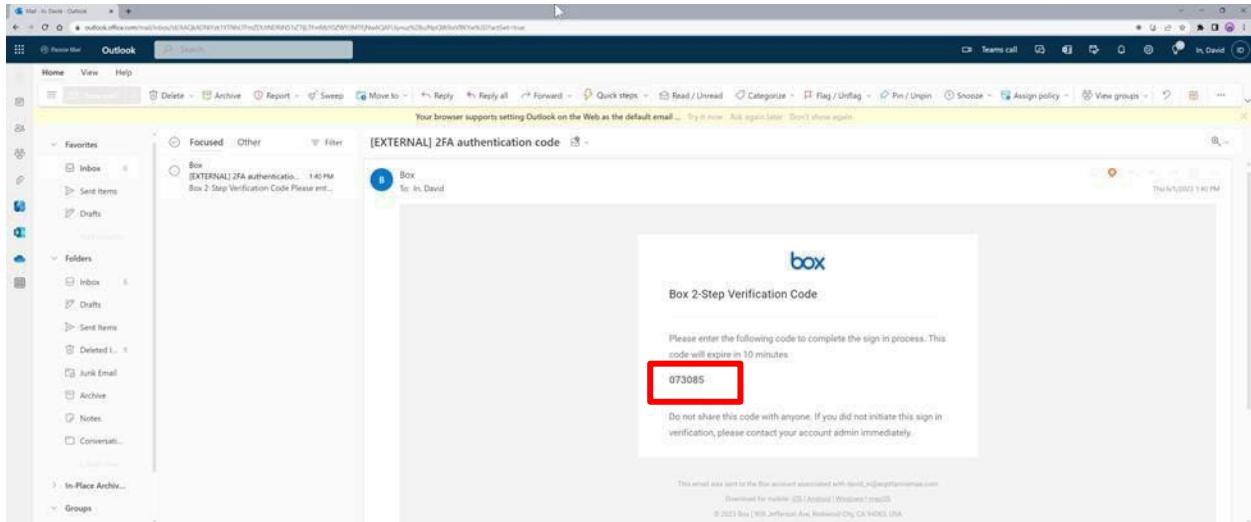
NOTE: Authentication app and SMS text message sign-in options are also available; however, **email is recommended for the best user experience**. The email used to log into Box will receive the confirmation code for sign in.



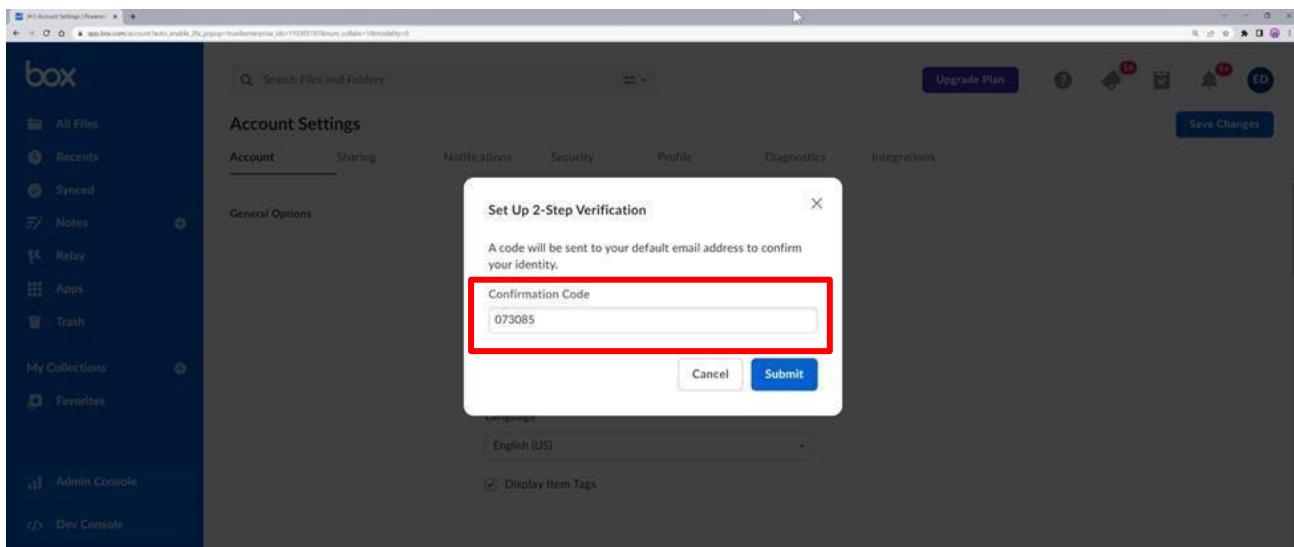
- 3) Click **Continue**.



- 4) An email with a confirmation code will be sent to the email address used at login. Use this confirmation code to confirm your MFA.



5) Enter the confirmation code sent to the email address and click **Submit**.





6) MFA is now set up. Refresh your browser to be redirected to the **Easy Transfer folder**.

NOTE: MFA is active for 8 hours. After this period, you will need to re-authenticate to access Easy Transfer.

The screenshot shows the Box web interface with the 'All Files' view. The left sidebar includes links for 'All Files', 'Recents', 'Synced', 'Notes', 'Relay', 'Apps', 'Trash', 'My Collections', 'Favorites', 'Admin Console', and 'Dev Console'. The main area displays a list of files and folders. A red box highlights the first item in the list:

NAME	UPDATED	SIZE
SMP Easy Transfer folder	Today by FNMA Box Sandbox Admin	0 F
My personal Box folder	Today by External David	1 File

Below the list, a message says 'Select a file or folder to view details.' A blue icon in the bottom right corner indicates a file is being selected.

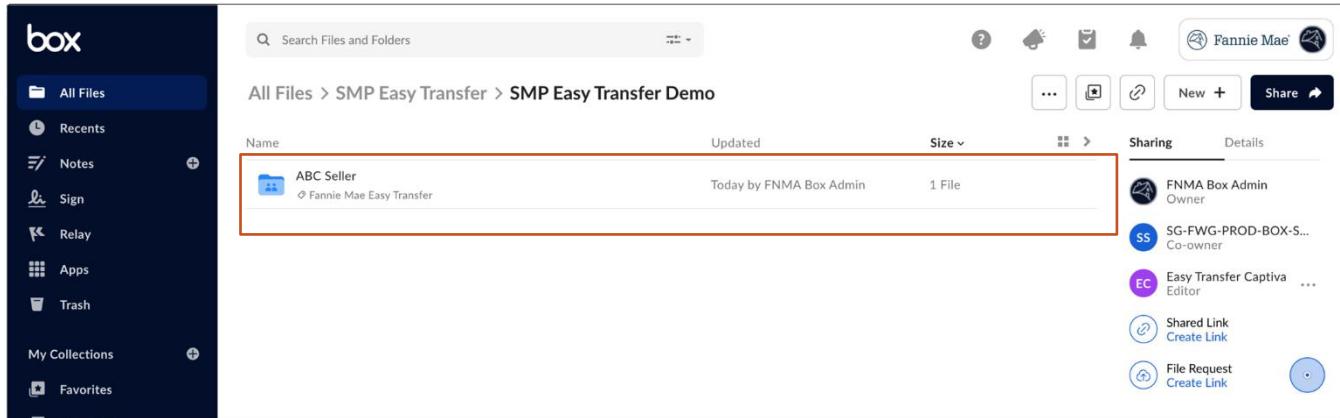


Transferring Loan Documents to Your Servicing Buyer(s)

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.

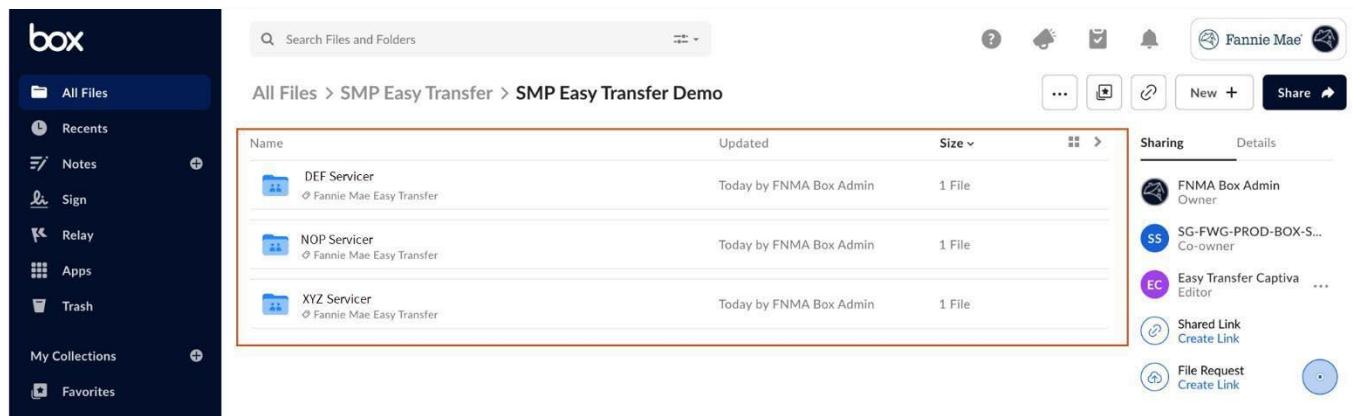
NOTE: *If you use Box for other purposes, you may see additional folders.*



The screenshot shows the Box interface with a sidebar on the left containing 'All Files', 'Recents', 'Notes', 'Sign', 'Relay', 'Apps', 'Trash', 'My Collections', and 'Favorites'. The main area shows a folder structure: 'All Files > SMP Easy Transfer > SMP Easy Transfer Demo'. A folder named 'ABC Seller' is highlighted with a red box. The folder details are: 'Name: ABC Seller', 'Updated: Today by FNMA Box Admin', 'Size: 1 File'. The 'Sharing' and 'Details' tabs are visible on the right, showing sharing permissions for 'FNMA Box Admin Owner', 'SG-FWG-PROD-BOX-S... Co-owner', 'Easy Transfer Captiva ... Editor', 'Shared Link Create Link', and 'File Request Create Link'.

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.*



The screenshot shows the Box interface with a sidebar on the left containing 'All Files', 'Recents', 'Notes', 'Sign', 'Relay', 'Apps', 'Trash', 'My Collections', and 'Favorites'. The main area shows a folder structure: 'All Files > SMP Easy Transfer > SMP Easy Transfer Demo'. Three folders are listed: 'DEF Servicer', 'NOP Servicer', and 'XYZ Servicer', all with the 'Fannie Mae Easy Transfer' tag. The 'Sharing' and 'Details' tabs are visible on the right, showing sharing permissions for 'FNMA Box Admin Owner', 'SG-FWG-PROD-BOX-S... Co-owner', 'Easy Transfer Captiva ... Editor', 'Shared Link Create Link', and 'File Request Create Link'.

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: *Upload only PDF files. Any other file format will not be processed. If a file is larger than 500MB, it must be split into at least 2 files of at least 20MB. See the naming convention section for more information.*

Box interface showing the 'Processed' folder in the 'XYZ Servicer' folder. A red box highlights the 'Drag and Drop Files Here' area.

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.

Box interface showing the uploaded file '4123456789_123450001.pdf' in the 'XYZ Servicer' folder. An arrow points to the file.

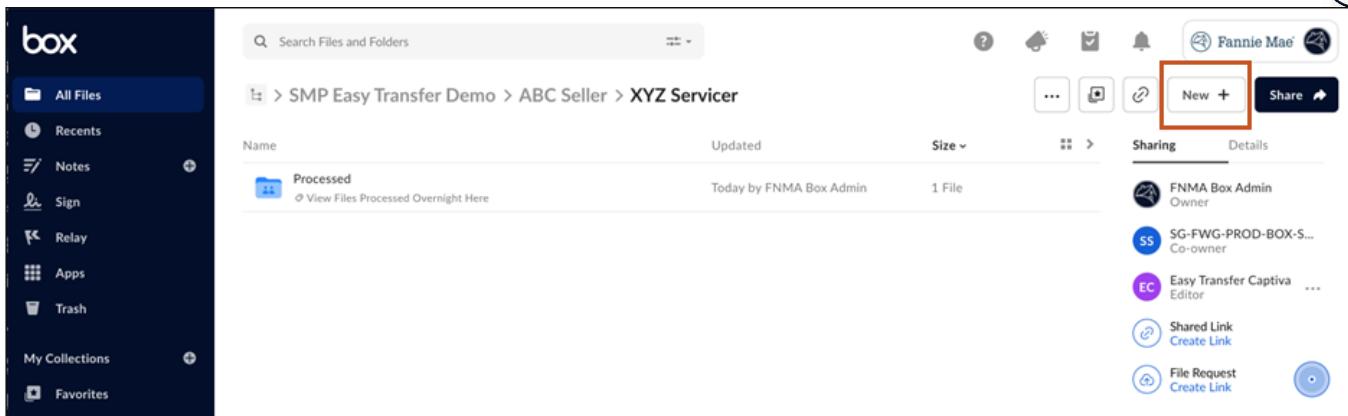
NOTE: *Sellers can only move, **not delete**, files once uploaded to Box. To delete files, contact [SMP Support](#).*

Option 2: Using the File Upload

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

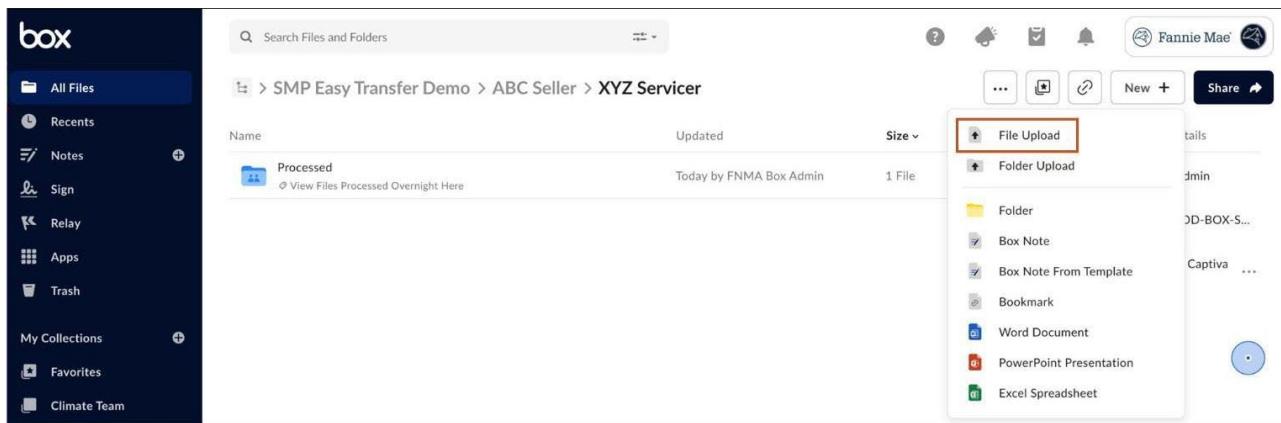
NOTE: *Upload only PDF files. Any other file format will not be processed.*

1. Click "New".



The screenshot shows the Box interface. The left sidebar has 'All Files' selected. The main area shows a folder structure: 'SMP Easy Transfer Demo > ABC Seller > XYZ Servicer'. Inside this folder is a single item named 'Processed'. The top right corner shows user information for 'Fannie Mae' and a 'New +' button, which is highlighted with a red box. The 'Sharing' tab is selected in the top right.

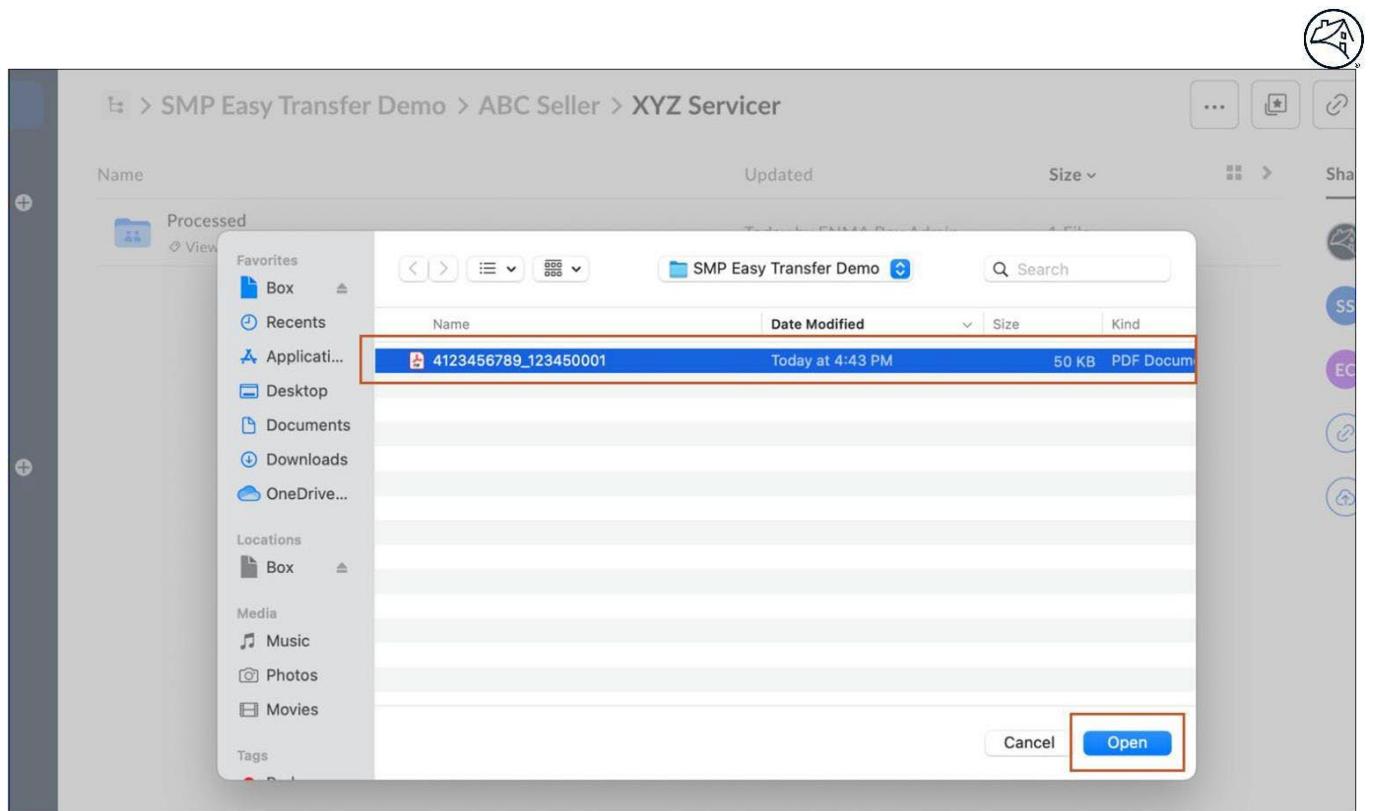
2. Click "File Upload".



The screenshot shows the same Box interface as the previous one, but the 'File Upload' option in the 'New +' menu is highlighted with a red box. The menu also includes 'Folder Upload', 'Folder', 'Box Note', 'Box Note From Template', 'Bookmark', 'Word Document', 'PowerPoint Presentation', and 'Excel Spreadsheet'.

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.

The screenshot shows the Box interface with the following details:

- File Details:** "4123456789_123450001.pdf" was uploaded successfully.
- File List:**
 - 4123456789_123450001.pdf** (Today by FNMA Box Admin, 48.9 KB)
 - Processed** (Today by FNMA Box Admin, 1 File)
- Sharing:** FNMA Box Admin (Owner), SG-FWG-PROD-BOX-S... (Co-owner), Easy Transfer Captiva (Editor), Shared Link (Create Link), File Request (Create Link).

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.

Confirming Processing of Loan Files

Files uploaded to the “ABC 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.

The screenshot shows a Box interface. The left sidebar has 'All Files' selected. The main area shows a folder structure: 'SMP Easy Transfer Demo > ABC Seller > XYZ Servicer'. Inside 'XYZ Servicer', there is a folder named 'Processed' with a blue folder icon. A red box highlights this 'Processed' folder. To the right, there is a table with columns 'Name', 'Updated', 'Size', 'Sharing', and 'Details'. The 'Processed' folder is listed with 'Updated' as 'Today by FNMA Box Admin' and 'Size' as '1 File'. The 'Sharing' section shows 'FNMA Box Admin Owner' and 'SG-FWG-PROD-BOX-S... Co-owner'. The 'Details' section includes links for 'Create Link' and 'Create Link' under 'Shared Link'.

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.*

The screenshot shows the 'Processed' folder from the previous step. Inside, there is a single file named '4123456789_123450001.pdf'. A red box highlights this file. The file was 'Updated' 'Yesterday by FNMA Box Admin' and has a size of '265.1 MB'. The 'Sharing' and 'Details' sections are visible on the right.

Easy Transfer File Naming Convention

All files uploaded to Easy Transfer must conform with the following naming convention:

- 10-digit Fannie Mae loan number assigned upon Fannie Mae delivery (e.g. 4123456789)
- Underscore (_)
- 9-digit Fannie Mae **Seller** Number used to commit and deliver (e.g. 123450001)
- Format: 4123456789_123450001.pdf

When sending **post-closing documents**, use: 4123456789_123450001_trailing.pdf

When sending **documents omitted from the original loan file submission**, use: 4123456789_123450001_missing.pdf

Users may include their own extension to the file name using an underscore. It must be a single word, with no spaces or special characters. For example, 4123456789_123450001_<Text>.pdf

Please consult with your servicer partner as to whether they will allow the use of custom file name extensions.



When sending a **document that has been split to reduce the file size**, use 4123456789_123450001_1, 4123456789_123450001_2

When sending a RON Video, use 4123456789_123450001_RON.

Please consult with your servicer partner before using Easy Transfer for RON videos. Easy Transfer will support most commonly used video file formats.

Loan File Errors

Starting on March 25, 2025, Easy Transfer will perform several validations on uploaded files, including

- The correct file naming convention is used
- Files are in .pdf format
- File size is less than 500MB

Uploaded files are processed by Easy Transfer four times per day, at 11am, 3pm, 6pm, and 10pm Eastern (times subject to change) Monday through Friday. If a file fails a validation, the user who performed the upload will receive an email from noreply@box.com at the next interval at which files are scanned throughout the day. An email referencing the name of the file will be received for each validation error.

Files that fail the naming, format, or size validations will be automatically deleted from Box and will require a re-upload with the correct naming, format, or size.

Here is a sample of the email that will be received for any loan file errors:



Easy Transfer Captiva commented on **1123456789_123450023.pdf**

"Location: Sample Servicer

The file uploaded does not conform to the prescribed naming convention.

Please rename the file. The user guide may be found here:

<https://singlefamily.fanniemae.com/media/32991/display>"

Do not reply to this email. If you have questions, please contact
SMP_Support@fanniemae.com.

... view and collaborate on this on mobile by getting [our app](#)

[Reply to Easy Transfer Captiva](#)