



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.

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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 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.



Fannie Mae

Sign On

USERNAME

* REQUIRED

PASSWORD

* REQUIRED

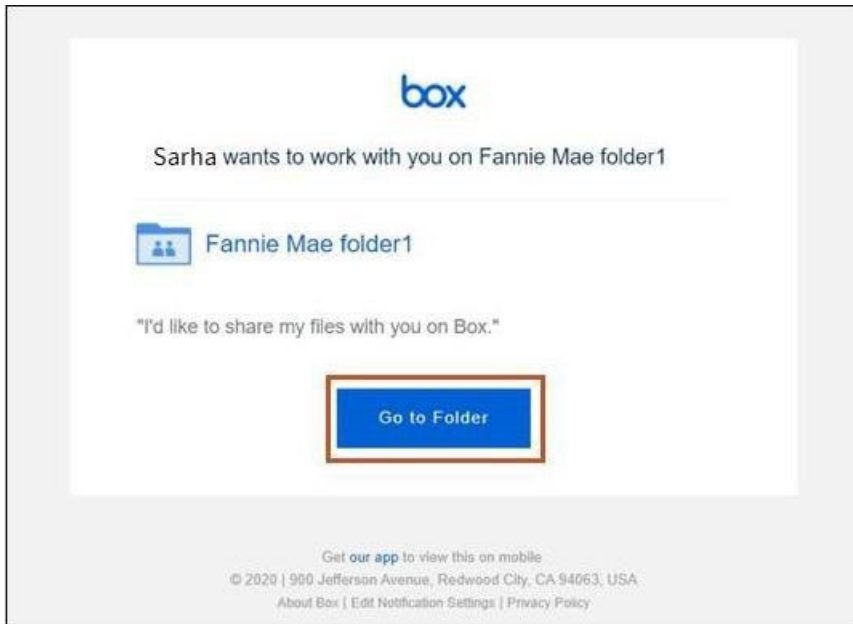
Sign On

[Need Help With Your User ID or Password?](#)



First Time Signing into Box (Alternative Method)

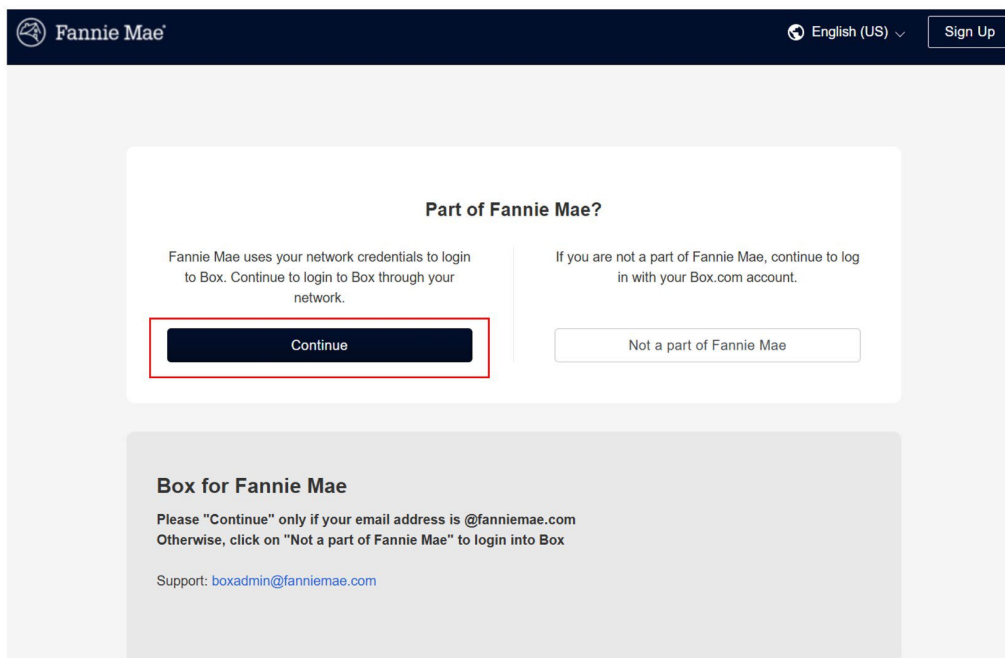
After your Corporate Administrator provides Box access, you will receive an email from noreply@box.com. Click the “Go to Folder” link in this email to access Box.



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”.





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

The image shows the Fannie Mae Sign On page. At the top is a dark blue header with the Fannie Mae logo and name. Below the header is a white box with the title "Sign On". Inside this box are two input fields: "USERNAME" and "PASSWORD". Each field has a light blue border and a small asterisk followed by "REQUIRED" below it. Below the input fields is a green "Sign On" button. At the bottom of the white box is a link that says "Need Help With Your User ID or Password?".

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 web browser window displaying the Box login page for Fannie Mae. The browser's address bar shows the URL "fanniemaaccount.box.com/login". The page has a dark blue header with the Fannie Mae logo, a language selector set to "English (US)", and a "Sign Up" button. The main content area is white and features a box titled "Part of Fannie Mae?". Below the title, it says "Fannie Mae uses your network username and password to login to Box. Continue to login to Box through your network." There are two buttons: a dark blue "Continue" button and a white "Not a part of Fannie Mae?" button with a red border.

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



box English (US) Box Blog Sign Up

Sign In to Your Account

Email Address

name@company1.com

Next

5. Enter Password.
6. Click Log In.

box English (US) Box Blog Sign Up

Sign In to Your Account

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

Password

Log In

[Reset Password](#)

Setting up Multifactor Authentication (MFA)

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

box Search Files and Folders Upgrade Plan ? 17 94 ED

All Files -

ACTION REQUIRED

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

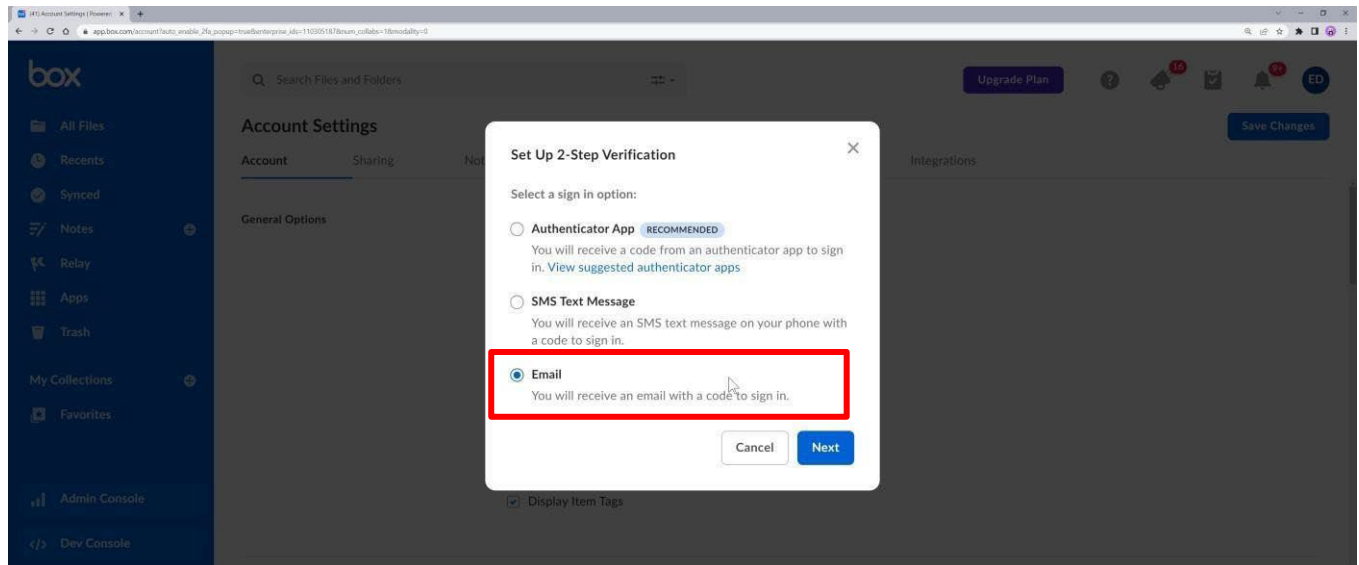
	SMP Easy Transfer folder	Two-Factor Authentication Required	Set Up
NAME		UPDATED ↓	SIZE
	My personal Box folder	Today by External David	1 File

Select a file or folder to view details.

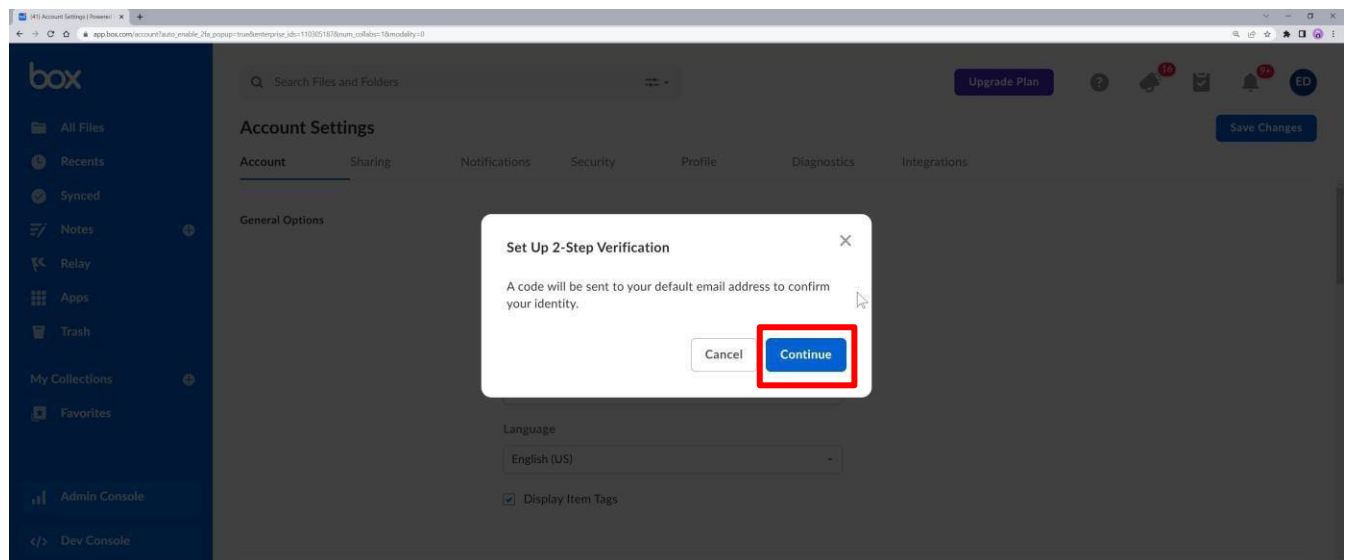
- 2) Select **Email** as the 2-step verification sign in option and click **Next**.



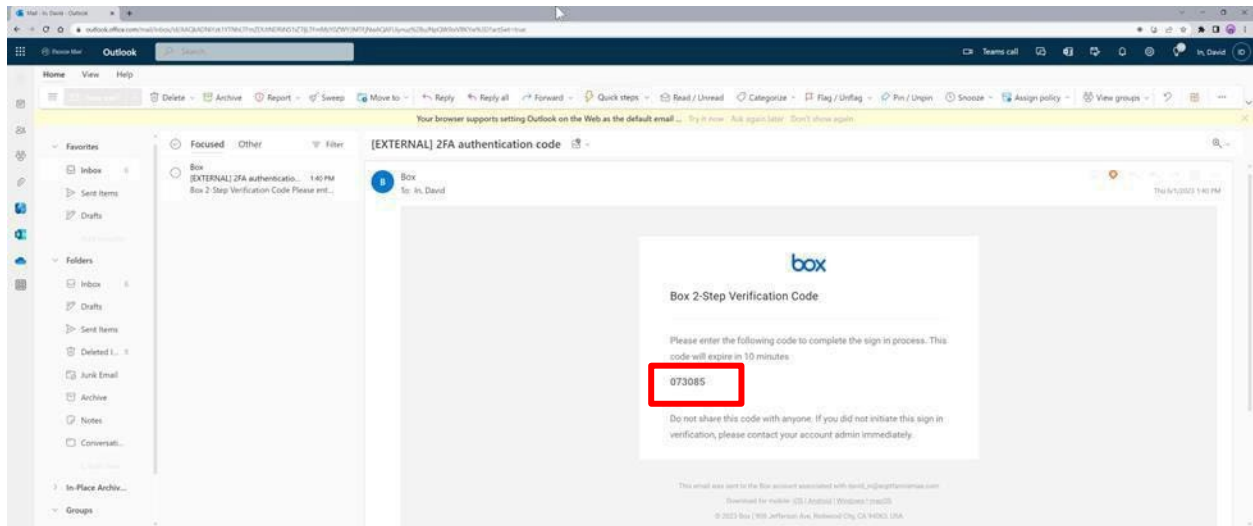
NOTE: Authentication app and SMS text message sign-in options are also available; however, **email is recommended for the best user experience.** The email used to log into Box will receive the confirmation code for sign in.



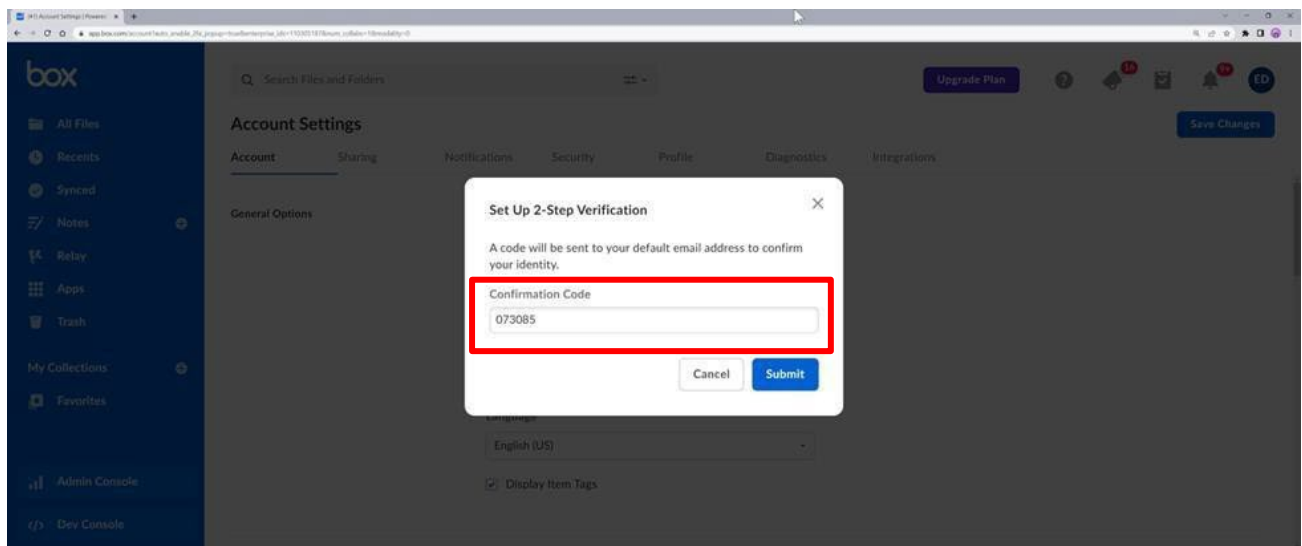
3) Click **Continue**.



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.

box

All Files

Recents

Synced

Notes

Relay

Apps

Trash

My Collections

Favorites

Admin Console

Dev Console

Search Files and Folders


Upgrade Plan


?

ED

New +

All Files -

NAME	UPDATED ↓	SIZE	
 SMP Easy Transfer folder	Today by FNMA Box Sandbox Admin	0 B	⋮ ⭐ □
 My personal Box folder	Today by External David	1 File	



Select a file or folder to view details.

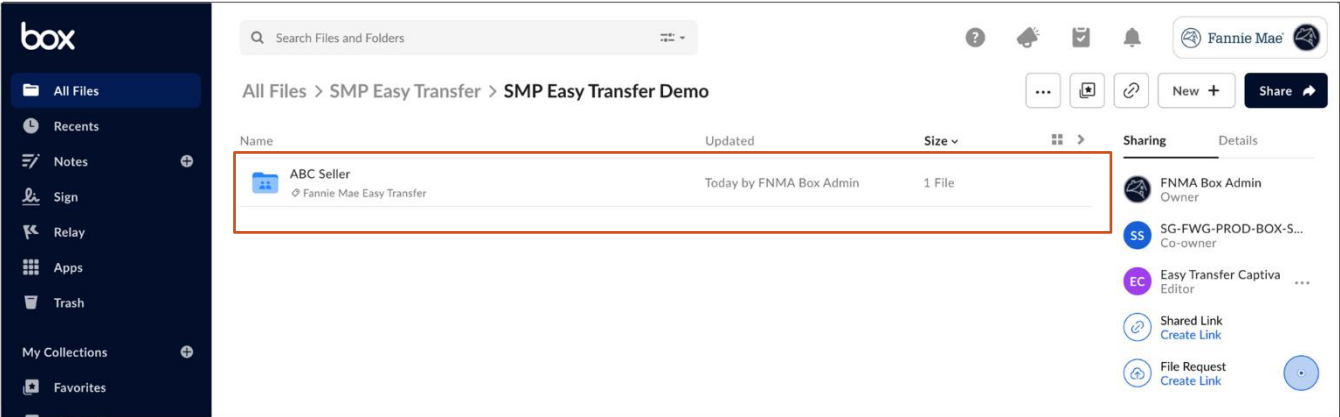


Transferring Loan Documents to Your Servicing Buyer(s)

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.

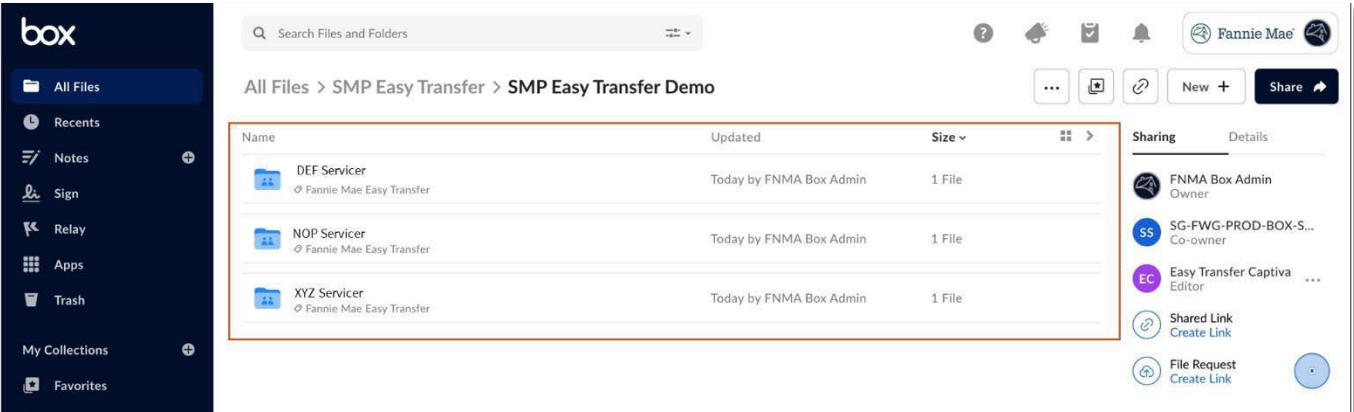
Identify the folder with your seller’s name and the Fannie Mae Easy Transfer tag.

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

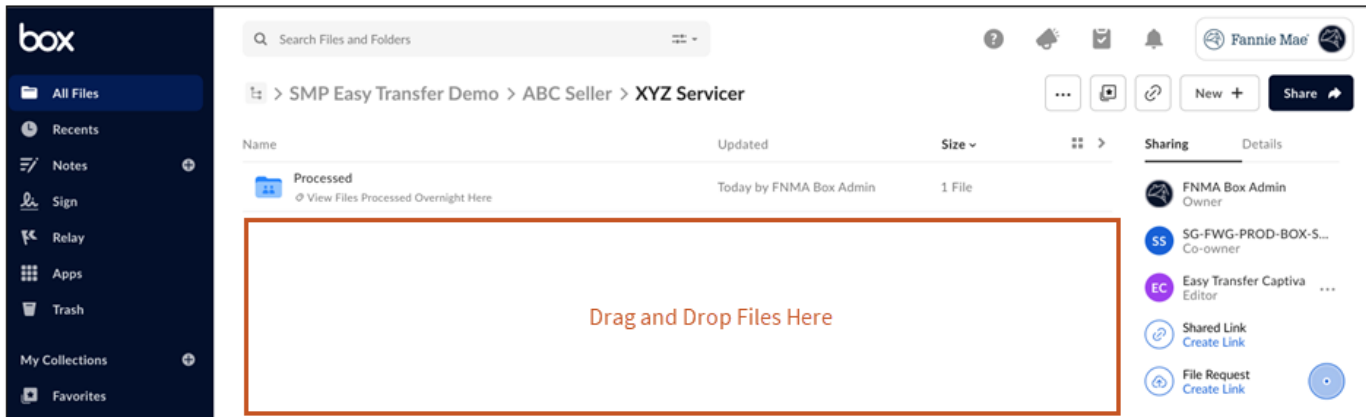
To transfer loan documents to your servicing buyer using the drag and drop option, follow the steps below.

- 1. Navigate to the servicer’s folder.



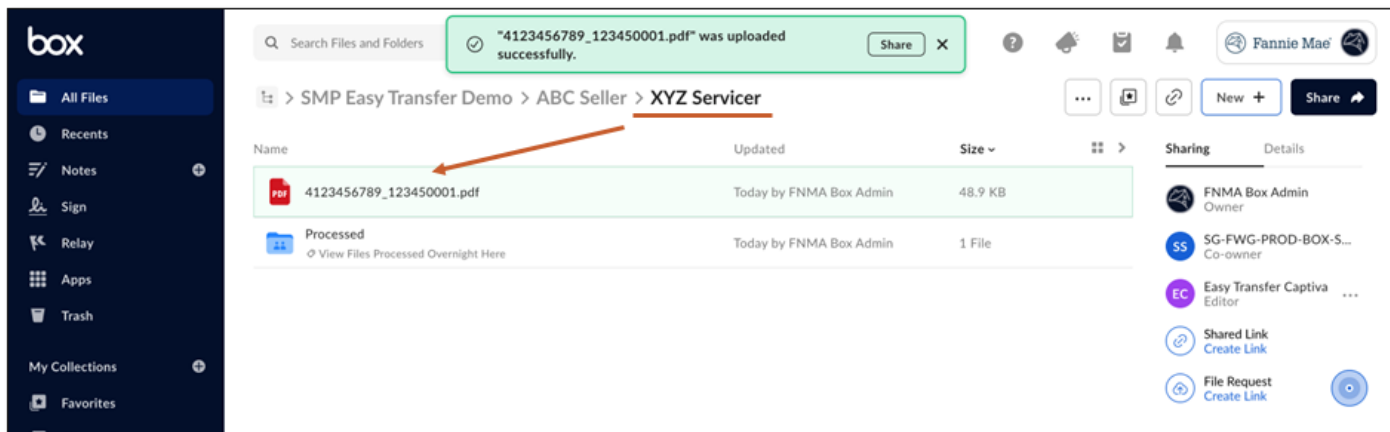
2. Drag and drop loan document to the white space.

NOTE: 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.



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.



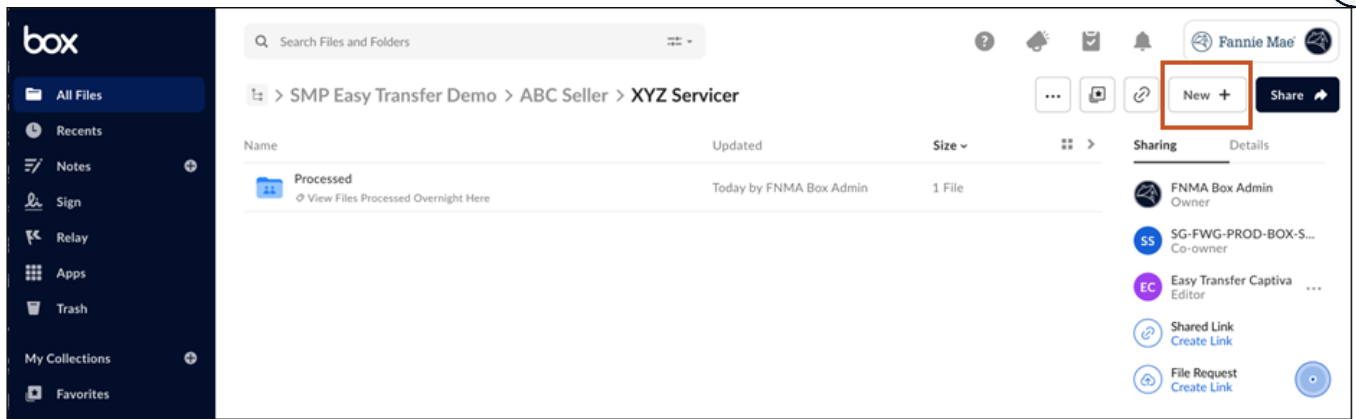
NOTE: Sellers can only move, **not delete**, files once uploaded to Box. To delete files, contact [SMP Support](#).

Option 2: Using the File Upload

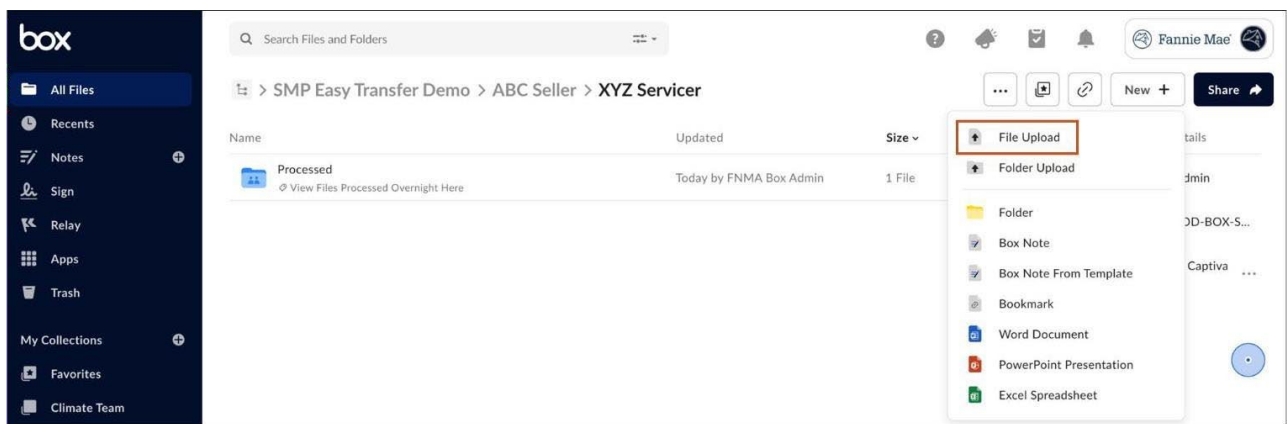
To transfer loan documents to your servicing buyer using the file upload option, follow the steps below.

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

1. Click “New”.

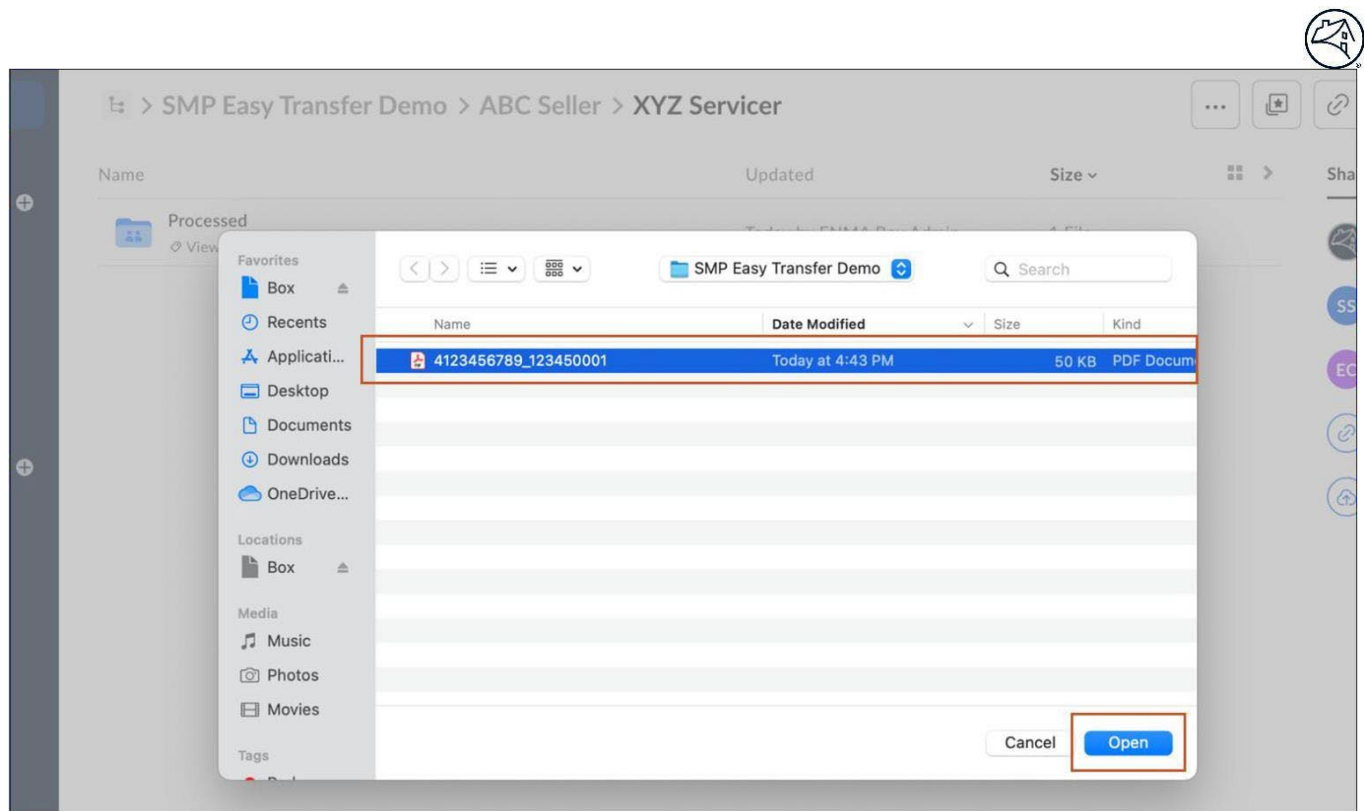


2. Click “File Upload”.

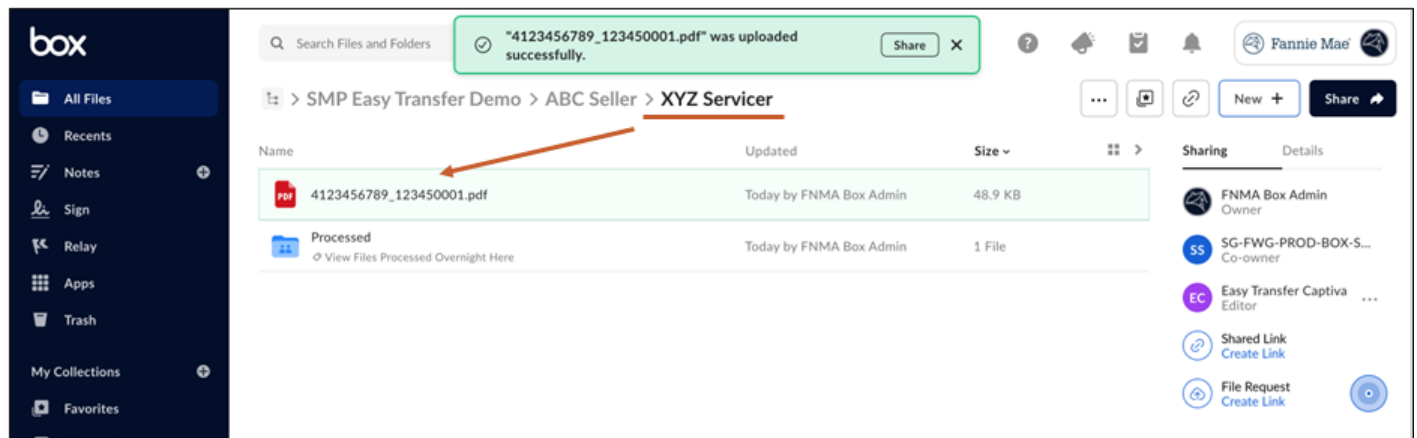


3. Choose Document(s) and Click “Open”.

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 overnight. Do not drag and drop files here. Files are purged from the Processed folder every 14 business days.

Confirming Processing of Loan Files

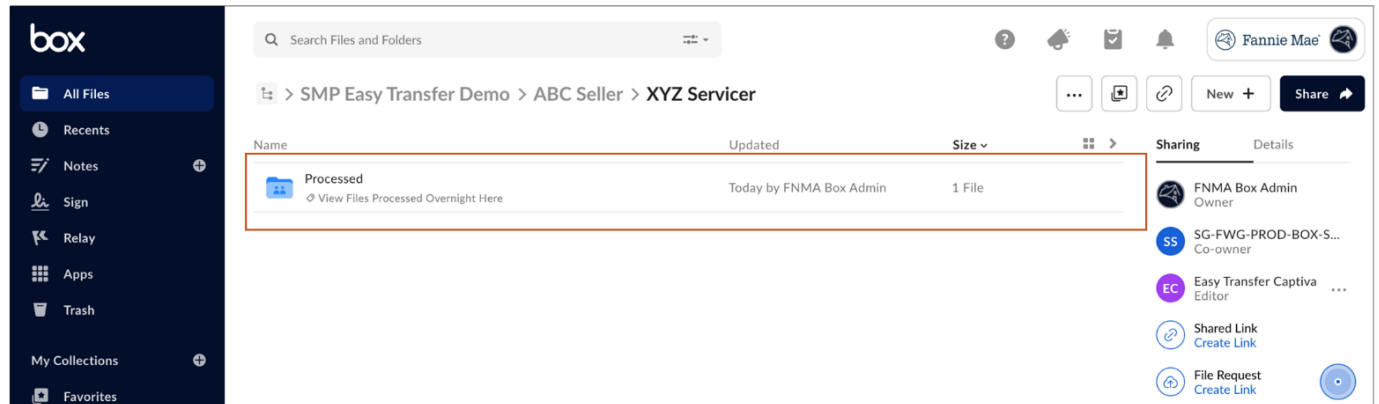
Files uploaded to the “ABC Seller Folder” by 9:00PM EST will be processed overnight and available to the servicer the following business day.

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.



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 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