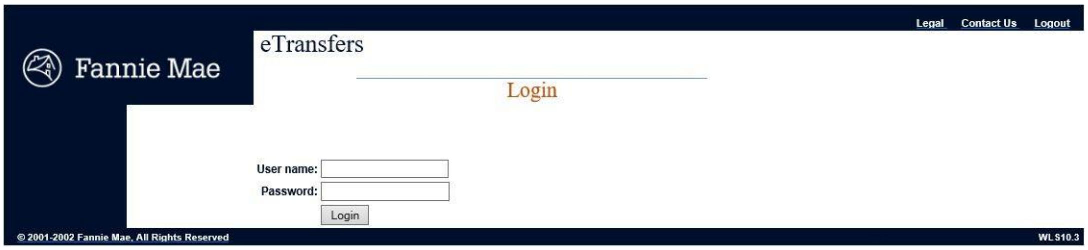
Fannie Mae

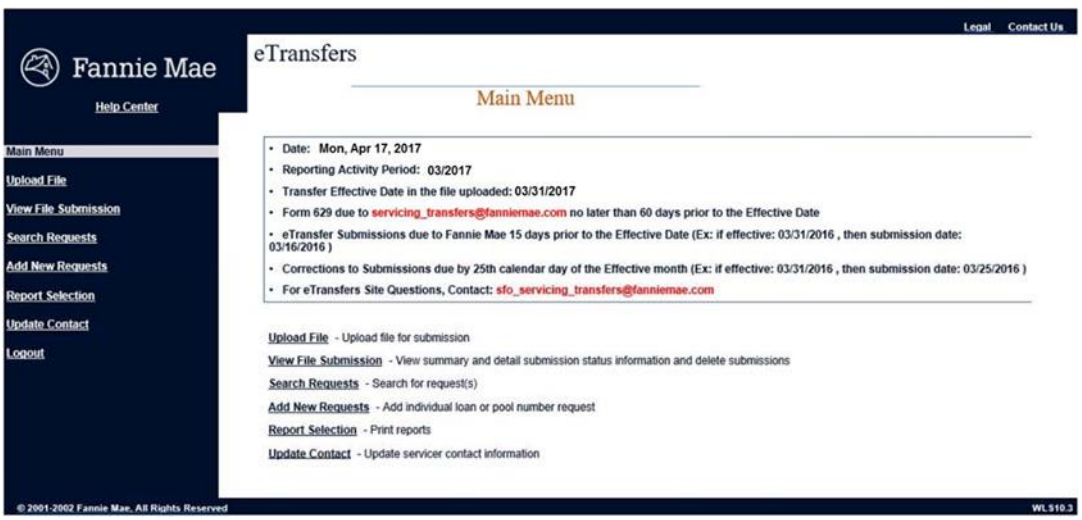
Using eTransfers

This document provides a guide to the functions provided in Fannie Mae's eTransfers application.

First login to the application by providing the User Name and Password and then clicking Login. Providing the user credentials are valid, the Main Menu is presented.



Main Menu



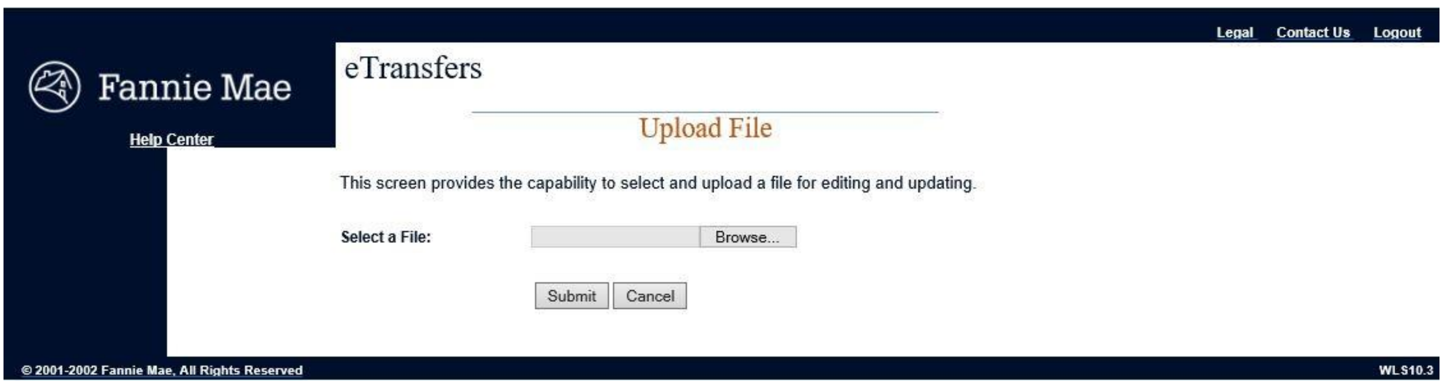
The Main Menu presents the following information:

- **Date** – today's date
- **Reporting Activity Period** - current period for Lender Reporting; usually one month prior to the current month
- **Transfer Effective Date** – last day of the month the Transferor is responsible for the loan/pool
- **Form 629** – Before submitting a transfer request, you must complete Form 629 (Request for Approval) and email it to the Regional Office at least 60 days prior to the Effective Date. The 629 form is only required for external transfers where the first five digits are different and it does not impact a sub-servicer transfer.
- **Submission Due Date** – the request must be in a Pending Status in eTransfers at least 15 days prior to the Effective Date indicated in the transfer request
- **Corrections** – suspended records must be corrected no later than the Effective Date

The Main Menu provides links to the following:

- **Help Center** – select this option to connect to Fannie Mae's Technology Applications Support web page
- **Main Menu** – select this option for the Main Menu
- **Upload File** – Select this option to upload a file from your computer to the eTransfers application
- **View File Submission** – Select this option to view summary/detail file submission information or to delete file submissions
- **Search Requests** – Select this option to search for transfer request(s)
- **Add New Requests** – Select this option to add new transfer requests
- **Report Selection** – Select this option to print or download a report
- **Update Contact** – Select this option to update servicer contact information
- **Logout** – Select this option to log out of the eTransfers application

Upload File



Select the Upload File option to upload into the eTransfers application.

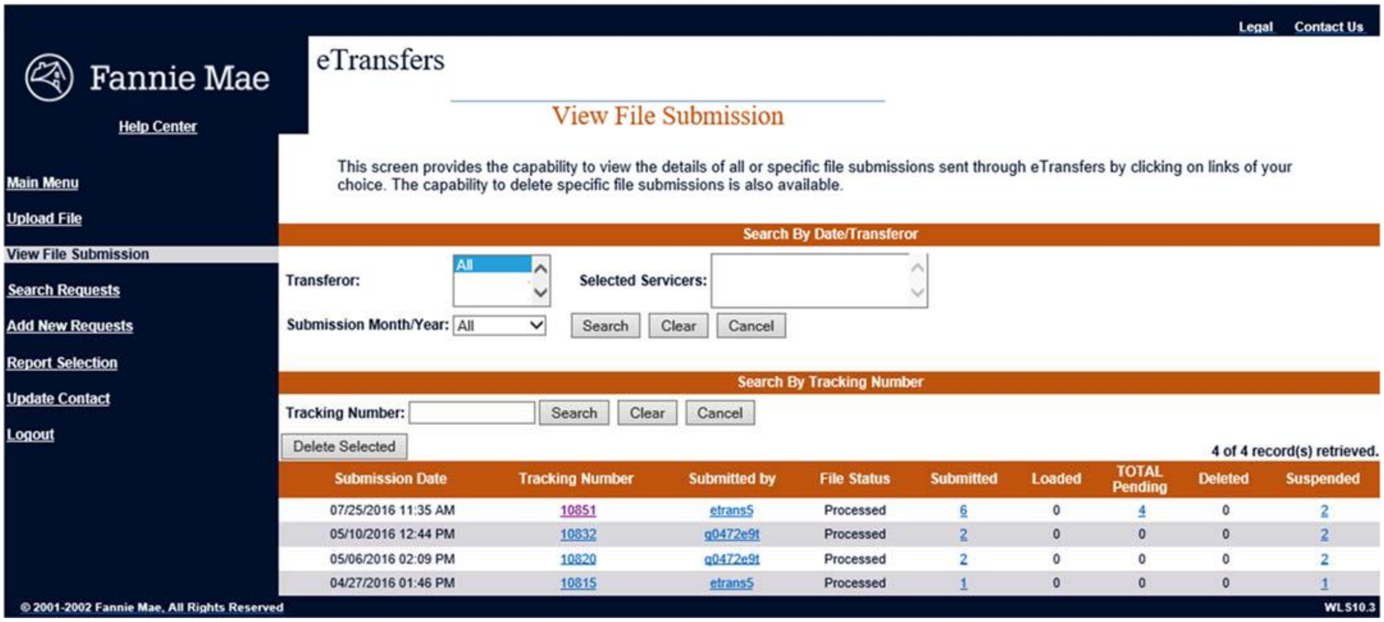
- Input the name and location of the file you want to upload from your PC to the eTransfers application

– OR –

- Click **Browse** to choose the file name and location from your PC
- Click **Submit** to upload the file into the eTransfers application

Clicking **Cancel** returns to the previous screen.

View File Submission



After submitting servicing transfer requests via the eTransfers upload, you can view the results of the submission on this screen.

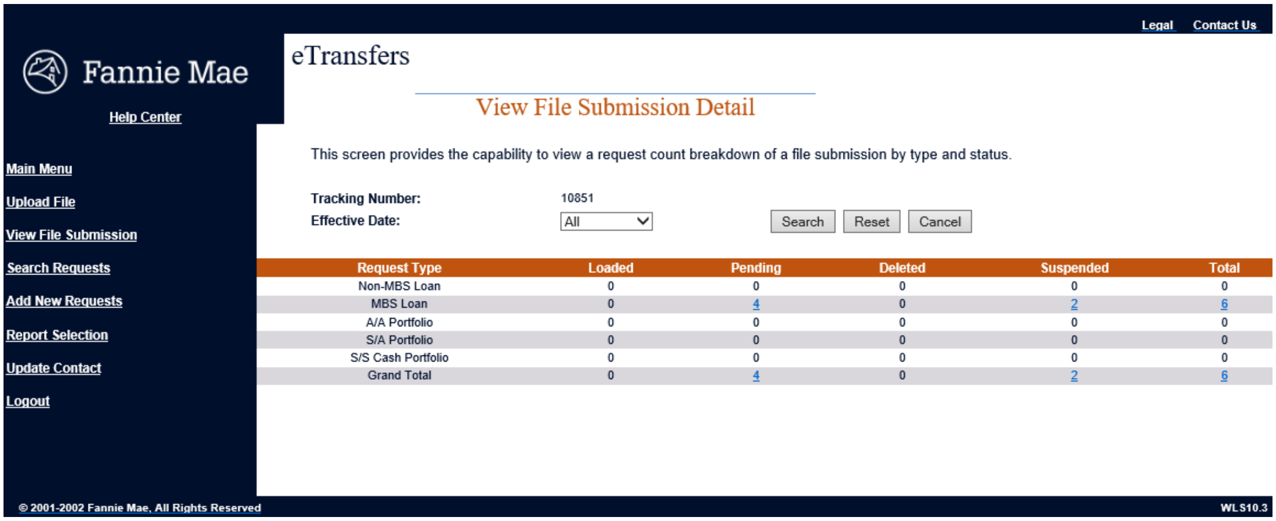
To create a custom search:

- Select the ‘**Transferor**’ number(s) included in the file(s), which will be displayed in the ‘**Selected Servicers**’ box
  Note: You may select multiple servicers by holding down Ctrl + Alt and clicking on the servicer numbers
- Select the ‘**Submission Month/Year’** in which the file was submitted
- Click **Search** to initiate the search; **Clear** to clear the dialog boxes; **Cancel** to return to the previous screen

- OR -

- Input the ‘**Tracking Number**’
- Click **Search** to initiate the search; **Clear** to clear the dialog box; **Cancel** to return to the previous screen
- Click on the empty box next to the ‘**Submission Date**’, then click ‘**Delete Selected**’ to delete a submission
- Click on the linked tracking number to access the **View File Submission Detail** screen
- Click on the linked userid in the ‘**Submitted by**’ column to access the **View Contact** information screen
- Click on the status/count link to view the Request List for a particular status (**Submitted, Loaded, Pending, Deleted, or Suspended**)

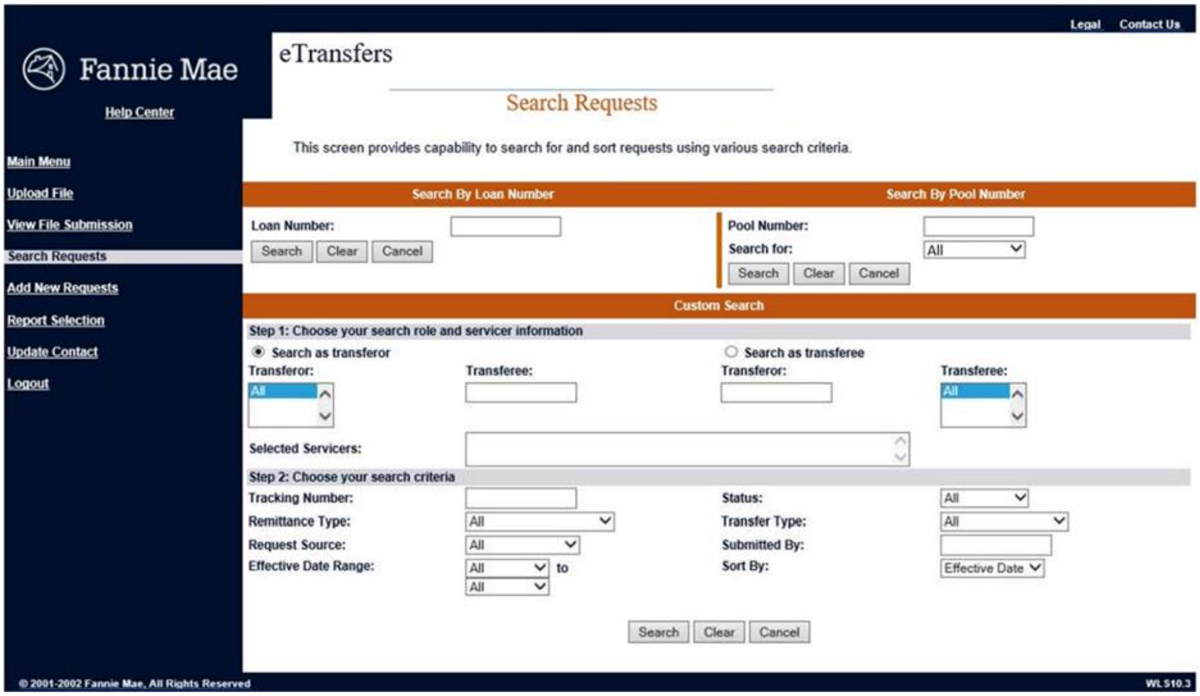
View File Submission Detail



Request Type	Loaded	Pending	Deleted	Suspended	Total
Non-MBS Loan	0	0	0	0	0
MBS Loan	0	4	0	2	6
A/A Portfolio	0	0	0	0	0
S/A Portfolio	0	0	0	0	0
S/S Cash Portfolio	0	0	0	0	0
Grand Total	0	4	0	2	6

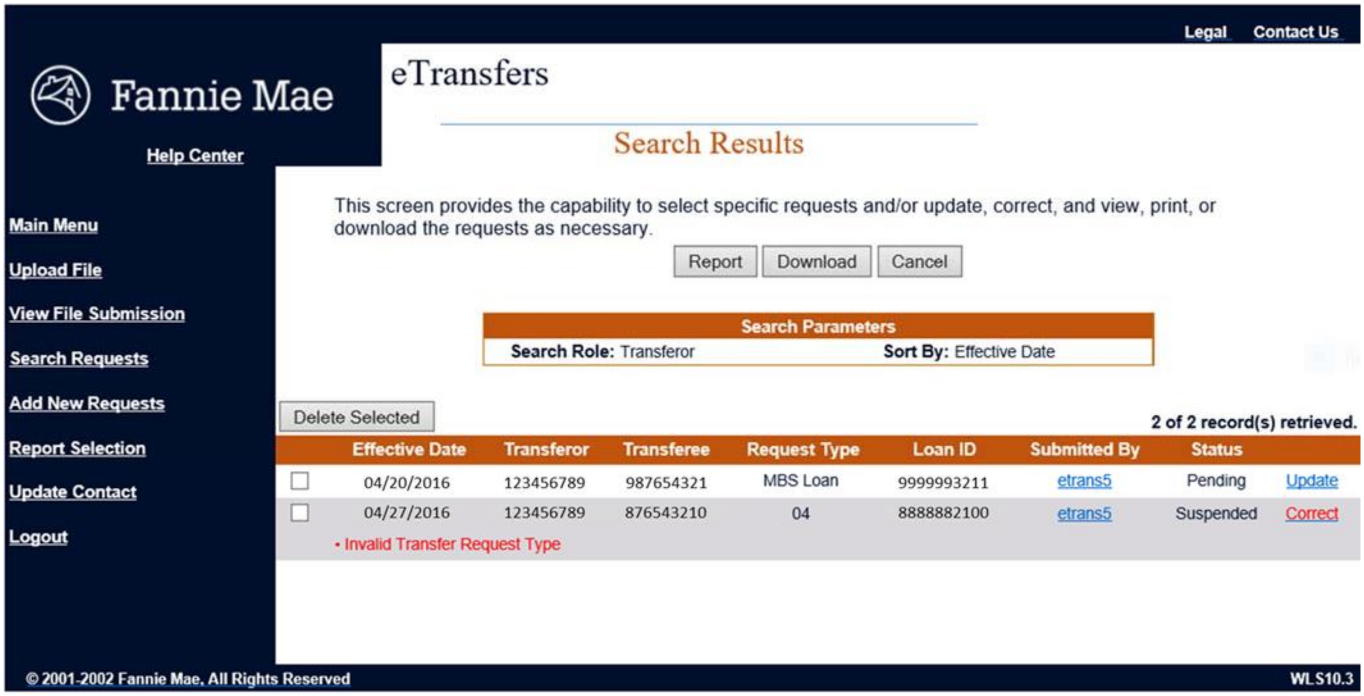
- Select ALL or a specific '**Effective Date'**
- Click **Search** to initiate the search
- Click **Reset** to return the menu option to its previous state
- Click **Cancel** to return to the previous screen
- Click on any status/count link to view the Request List for a particular status (**Loaded, Pending, Deleted, Suspended or Total**) and **Request Type** (Non-MBS Loan, MBS Loan, A/A Portfolio, S/A Portfolio, S/S Cash Portfolio or Grand Total)

Search Requests



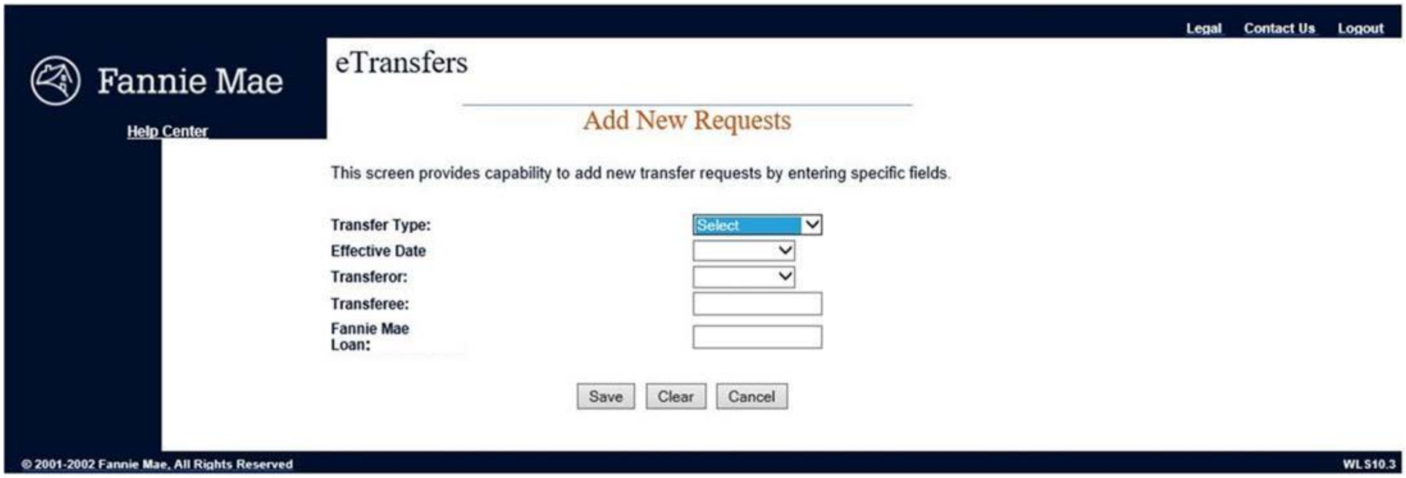
- To search for a specific Fannie Mae **Loan Number**, input the number in the **Search For Loan Number** box and click **Search**
- To search for a specific Fannie Mae **Pool Number**, input the number in the **Search For Pool Number** box and click **Search**
- The **Custom Search** section provides to **Search as a Transferor**, **Search as a Transferee**
- To **customize** a search, use any combination of the criteria listed in the **Choose Your Search Criteria section**, then click **Search**

Search Results



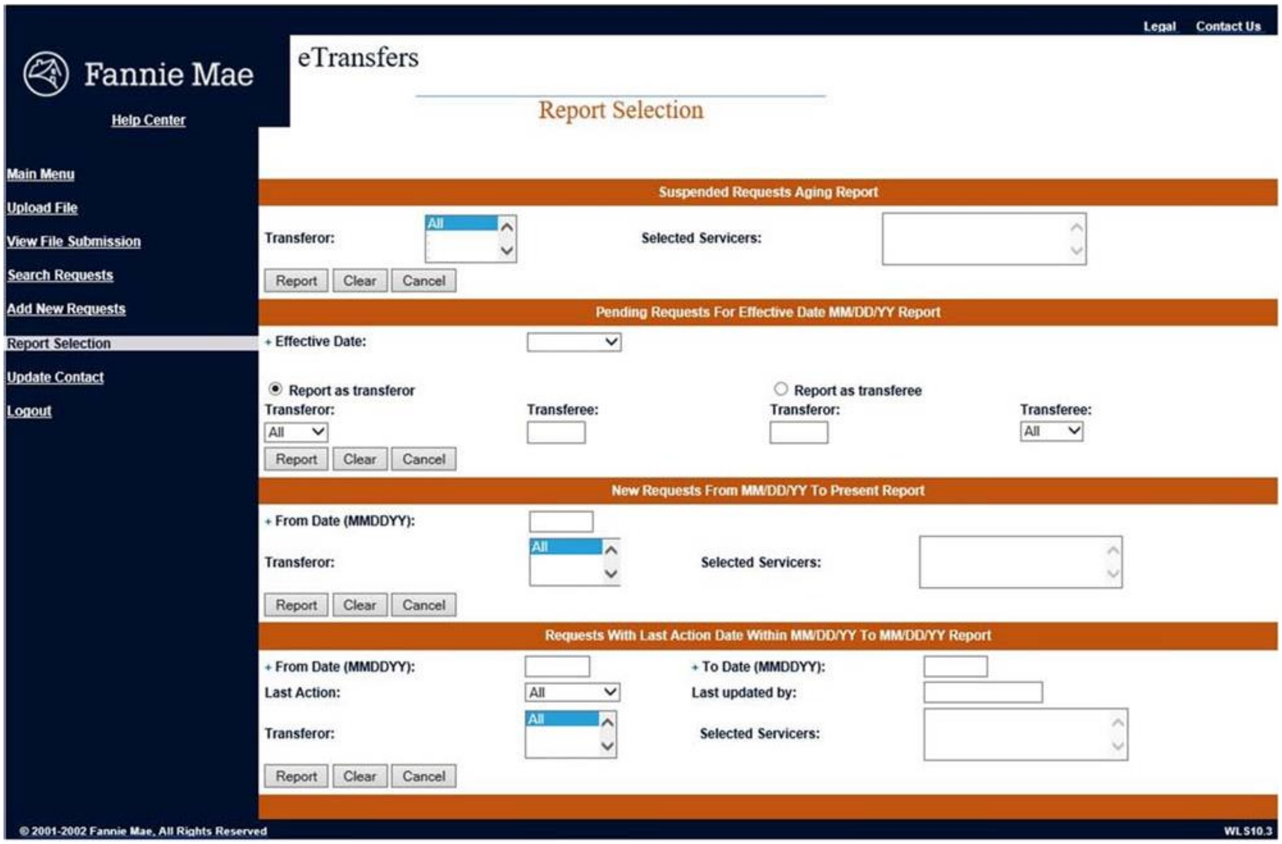
- On every Search Results screen, click **Report** to produce an ad hoc report of the data on the screen. The .pdf (Adobe Acrobat Reader®) report file can be printed or saved to your hard drive.
- On every Search Results screen, click **Download** to download a text file of the data on the screen to your hard drive.
- Click **Cancel** to return to the previous screen
- To delete a request(s), click on the empty box next to the '**Effective Date'**, then click '**Delete Selected'** to delete a request(s)
- To change the **Effective Date** and/or **Transferee** lender number on a **Pending** request, click the blue **Update** link
- To correct any data field that is causing a request to be Suspended, click the red **Correct** link

Add New Requests



- If you want to submit a small number of transfer requests, you may wish to select the Add New Requests option instead of creating and submitting an upload file.
- Select the '**Transfer Type'**
- Select the '**Effective Date**'
- Input the '**Transferor Number**'
- Input the '**Transferee Number**'
- Input the '**Fannie Mae Loan'**
- Click **Save** to add a request
- Click **Clear** to clear all dialog boxes
- Click **Cancel** to return to the previous screen

Report Selection



For your convenience, you can generate four on-demand reports with the flexibility of specifying several search criteria to determine your level of detail.

Update Contact

If your contact information changes, remember to select this option and update your information so Fannie Mae or other authorized users may contact you via telephone, fax, or email. Also, every 6 months, you will be prompted to update your contact information.

- Input the '**Company Name**' (required)
- Input the '**Contact Name**' (required)
- Input the '**Phone Number**' (required)
- Input the '**Fax Number**'
- Input the '**E-Mail'** address
- Click **Save** to accept the information
- Click **Clear** to clear all dialog boxes
- Click **Cancel** to return to the previous screen