

ServicerConnect User Manual

A guide to understanding Computershare Corporate Trust's Web-based application for delivering all your online monthly investor reports to the Bank in a safe and secure environment

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A. Welcome to ServicerConnect

ServicerConnect is a web-based application that was created especially for you to deliver all your monthly investor reports to Computershare Corporate Trust in a secure environment. The site serves as our preferred method for file delivery for all our Servicers' reporting and offers you a centralized place for uploading loan level files and reports, as well as for manual entry of loan level data if necessary.

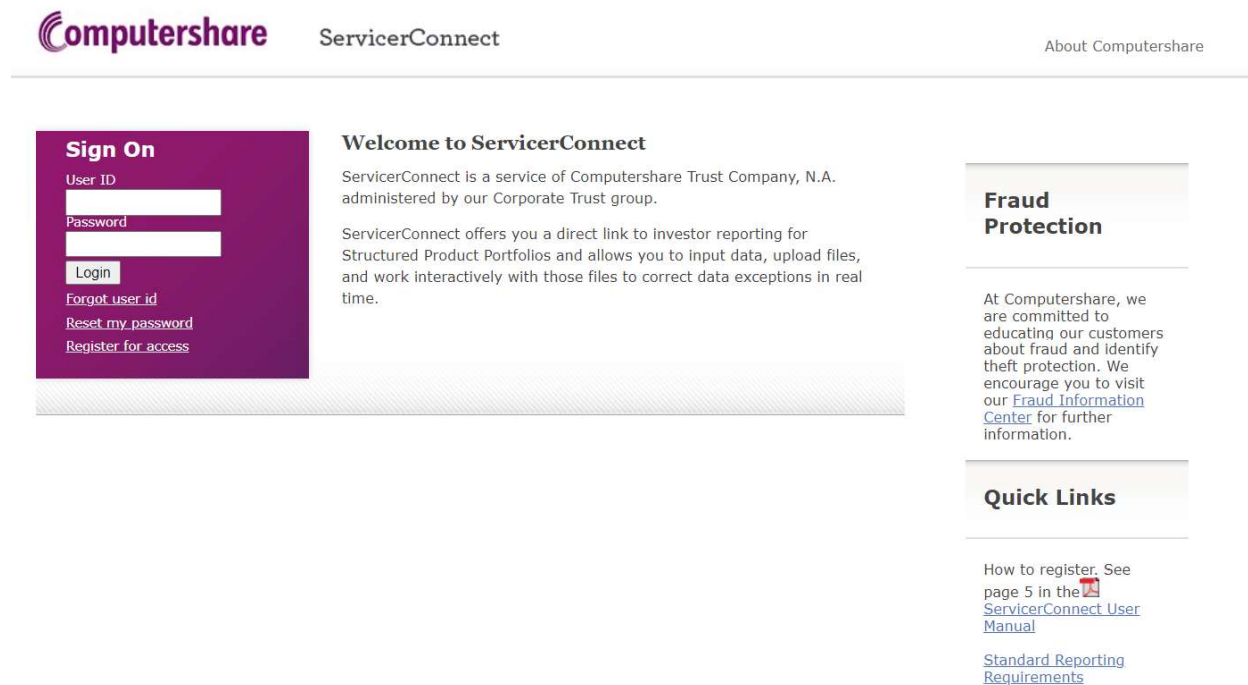
Additional benefits include:

- 24/7, round-the-clock access
- No cost for service
- 128-bit encryption Secure Sockets Layer (SSL), ensuring for secure transfer of files and in keeping with the Privacy Act requirements for maintaining confidentiality of data
- Customer Support
 - For Servicer Reporting Support
 - Loan level issues
 - Revisions
 - [Contact your Computershare Analyst](#)
 - For Servicer Support
 - Unlock Account
 - Reset Password
 - Connectivity issues
 - Registration questions
 - ServicerConnect questions
 - Request SFTP connection to ServicerConnect
 - ServicerConnect@computershare.com

B. Accessing the ServicerConnect homepage

1. Select an Internet browser from the Start Menu on your personal computer.
2. Type www.servicerconnect.com in the browser's address field.

[Figure: **ServicerConnect** homepage]



3. There is an important link at the bottom of the homepage: [Privacy Policy](#)—discloses our obligation for keeping your profile information private.

Note: If you currently have an active account for CTSLink and CTS Direct, you can bypass the registration process. Proceed to sign-on with your CTSLink or CTS Direct user id and password to Request Access

C. Registering

1. Select the **Register for Access** link located under Reset Password link on the Sign On screen on the home page.
2. Review the **Terms and Conditions** page to understand the rules for accessing this service and operating this site.
3. Click on the **Accept** button at the bottom of the page **if you agree** to the Terms and Conditions.
 - a. This allows you to proceed with the registration process.
4. Click on the **Decline** button at the bottom of the page **if you do not agree** to the Terms And Conditions.
 - a. This will return you to the ServicerConnect homepage.
5. Enter your **Account Contact Information** into the following required fields:
 - **User ID**- create a user id for your account
 - **Email Address**- your work email address
 - **Confirms Email** – confirm your email address
 - **First Name**—your first name
 - **Last Name**—your last name
 - **Company**—the name of your Company
 - **Business Type**—this will always be **Servicer**
 - **Country** – Select your Country
 - **Mailing Address**—your work address
 - **City**—the city where you work
 - **U.S. State**—the state where you work
 - **Zip/Postal Code**—the zip code for your work address
 - **Primary Phone #**—your business phone number
 - **Mobile Phone#**— your mobile phone number
6. Click the **Continue** button to submit your information. A notice screen will appear stating that you will receive an email with further instructions. Close and go to your mailbox.

D. Activating Account

1. Open email from Computershare with subject line "Welcome to Computershare"
2. Click the link, **Activate Computershare Account**
3. You will be taken to the set-up security methods screen. Click **Set up**
4. From the set-up screen, create a password using the **Password Requirements:**
 - At least 8 characters
 - A lowercase letter
 - An uppercase letter
 - A number
 - A symbol
 - No parts of your username
 - Does not include your first name
 - Does not include your last name
 - Your password cannot be any of your last 24 passwords
 - At least 1 day(s) must have elapsed since you last changed your password
5. Re-enter your password and click **Next**
6. Security Methods screen - there is an option to set up Okta Verify (authenticator app), this is optional. Click **Set up later**
Note: you will receive an email confirming the security method enrollment
7. My Apps dashboard screen - click the **ServicerConnect** tile to be taken to the home page of ServicerConnect.

E. Request Access

1. Sign in to ServicerConnect using your newly created User ID and password
2. Click on the drop-down and select whether you are a Manager or Analyst
 - a. If you are an Analyst, input your Manager's information
 - Name
 - Phone
 - Email
 - b. If you are a Manager, you will be requested to perform a bi-annual certifications of the users that have access to your ServicerConnect library
3. Click **Submit**, then click **OK**
4. Exit site and wait for e-mail notification (usually approved within two business days)

5. Once approved, you will receive with the subject line "ServicerConnect Account Request Approved". You are now able to upload files to ServicerConnect.

F. Navigating the ServicerConnect site—as a registered user

1. Sign in to ServicerConnect using your newly created User ID and password

[Figure: **Registered user's home page**]

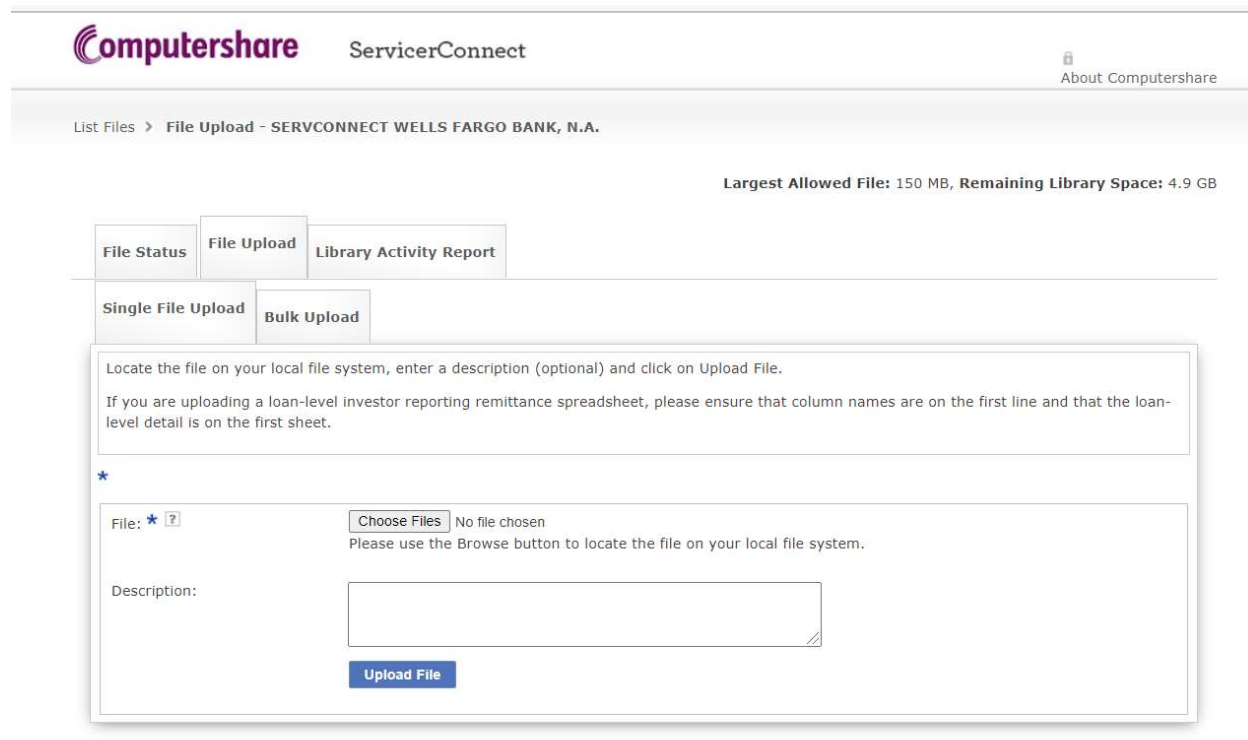


2. You have access to ServicerConnect's homepage and the following links at the top of the tool bar:
 - My Account – displays user's account information
 - Change Password – allows user to update your password
 - Contact Us – Resources to contact for assistance
 - Help – Help FAQs and documents
 - Sign off – log off site
3. Additionally, there are three tabs related to file upload activity
 - File Status – Once a file is uploaded it will display the file status
 - File Upload – Provide two options to upload files
 - a. Single file
 - b. Bulk files
4. Library Activity Report – Allows user to view their upload activity based on a date range

G. Uploading Files – Single File Upload

1. Sign in to ServicerConnect using your Servicerconnect User ID and password

[Figure: **File Upload** page]



Computershare ServicerConnect

About Computershare

List Files > File Upload - SERVCONNECT WELLS FARGO BANK, N.A.

Largest Allowed File: 150 MB, Remaining Library Space: 4.9 GB

File Status | **File Upload** | Library Activity Report

Single File Upload | Bulk Upload

Locate the file on your local file system, enter a description (optional) and click on Upload File.

If you are uploading a loan-level investor reporting remittance spreadsheet, please ensure that column names are on the first line and that the loan-level detail is on the first sheet.

*
File: * ? No file chosen
Please use the Browse button to locate the file on your local file system.

Description:

Version:2021.C1.1.66 u18a

[Privacy Policy](#)

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2. Select the **Single File Upload** under the File Upload tab
3. Click **Choose Files** to navigate to a file for uploading
4. Select the file and click the **Open** button
5. Enter a description of the file (**optional**)
6. Click the **Upload File** button once you have selected a file
 - a. Once the file has been successfully uploaded into the library, you will receive a file status

H. Uploading Files – Bulk File Upload

1. Select **Bulk Upload** under the File Upload tab
2. Click the **Add Files** button
3. Hold the Ctrl key and select the file(s) you would want to upload
4. Click the **Open** button
5. Once you have added all the files you want to send, click **Start Upload**
 - a. Once the file has been successfully uploaded into the library, you will receive a file status

Note: There is another option for the Bulk Upload feature: Drag and Drop.

- a. Browse to files location
- b. Highlight all files you would like to upload
- c. left-click and drag the files to the ServicerConnect window

I. Viewing File Status

1. Select the **File Status** tab. The system will display a list of previously uploaded files (along with the status for each).
2. The system may show the following file statuses in the **Process Status** column:
 - Pending Transmission**—indicates that the file has been stored in the library but has not yet been retrieved for processing by the Computershare analyst.
 - No further action is required of you
 - Auto Transmission Complete**—indicates that the file has been both stored in the library and retrieved for processing by the Computershare analyst.
 - No further action is required of you
 - File Uploaded**—indicates that the file has been stored in the library, but no system action will take place.
 - This occurs when the file is not recognized as a monthly processing file, because its filename is not stored in the Computershare database.

Note: The Virus Scan Status shows the following:

- **Clean** – The file was scanned and is clean of malware or other threats. File is now available for download. (Link is active)
- **Bypassed** – The file was uploaded, but not scanned because we disabled the antivirus scanner for some reason (license expired etc.).

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- **Pending** – File has been uploaded but not yet scanned for viruses. This will be displayed during the time between when the file is uploaded and the file is submitted for scanning.
 - **Scanning** – File is currently being scanned for viruses. This is probably going to be a common state for users because virus scanning is not instantaneous for large files.
 - **Infected** – The file was scanned and the antivirus software determined that there was a threat.
 - **Override** – Computershare has overridden the issue.
 - **Failed** – A fatal system error occurred

J. Editing your account

1. Select the **My Account** from the top toolbar
2. Update your contact information
 - **First Name**—your first name
 - **Last Name**—your last name
 - **Company**—the name of your Company
 - **Business Type**—this will always be **Servicer**
 - **Country** – Select your Country
 - **Mailing Address**—your work address
 - **City**—the city where you work
 - **U.S. State**—the state where you work
 - **Zip/Postal Code**—the zip code for your work address
 - **Primary Phone #**—your business phone number
 - **Mobile Phone#**—your mobile phone number
 - **Your Role**—either Manager or Analyst
7. Click the **Update Contact Information** to submit your contact updates to the system
8. You will receive a message informing you that your information has been updated

K. Changing your Password

1. Select the **Change Password** link from the top toolbar
2. Enter your Current Password
3. Create new password using the **Password Requirements:**
 - At least 8 characters
 - A lowercase letter
 - An uppercase letter
 - A number
 - A symbol
 - No parts of your username
 - Does not include your first name
 - Does not include your last name
 - Your password cannot be any of your last 24 passwords
 - At least 1 day(s) must have elapsed since you last changed your password
4. Confirm new password
5. Select **Change Now**

L. Contacting Us

1. Select the **Contact Us** link to obtain contact information for each Service Group
 - a. Contact **Servicer Support**
 - Unlocking your account
 - Resetting your password
 - Registration questions
 - ServicerConnect questions
 - File load requirements
 - Request SFTP setup to
 - b. Contact **Technical Support**
 - Connection issues
 - c. Contact your **Computershare Analyst**
 - Loan level Issues
 - Revisions