Registering for ServicerConnect®

All servicers are required to register for Computershare's ServicerConnect®, a secure online portal, to report MPF Mortgage Loan activity.

Note: If you currently have a User ID for CTSLink and CTS Direct for the MPF® Program, you can bypass the registration process and proceed to sign-on.
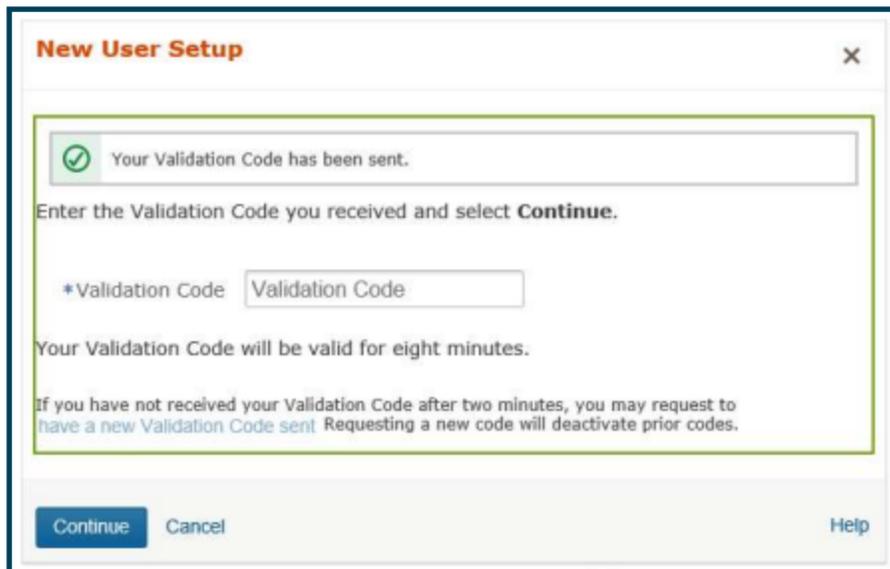
Steps to register for ServicerConnect:

1. Access the ServicerConnect portal using: www.servicerconnect.com

2. Select the **Register for Access** link located under 'Reset my password' link in the Sign On section of the home page.

3. Review the **Terms and Conditions** page to understand the rules for accessing this service and operating this site.

4. Click on the **Accept** button at the bottom of the page **if you agree** to the Terms and Conditions.
    - This allows you to proceed with the registration process.

5. Click on the **Decline** button at the bottom of the page **if you do not agree** to the Terms And Conditions.
    - This will return you to the ServicerConnect homepage.

6. 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 Servicing Shop
    - Business Type – this will always be
    - Country – Select your location
    - Mailing Address – your work address
    - Mailing Address 2 – additional work address
    - City – the city where you work
    - State or Province – the state where you work
    - Zip/Postal Code – the zip code for your work address
    - Primary Phone # – your business phone number
    - Mobile Phone # – secondary business phone number

7. Click the **Continue** button to submit your information.
    - The system will save your profile data and create your User ID.

    Note: The Reset button will refresh the screen. Once complete you will need to accept consent

8. Once your validation code is received via voice or text, enter the code and click continue at the bottom of the screen.

9. You will need to write or copy the validation code; it will be needed to complete the next step in your registration process.
    - This action notifies Computershare that you made a request for access.
    - The system will send a code to your chosen telephone number using your selected delivery method.

10. Enter the validation code received for the previous screen and create a password following all password requirements.

11. Re-enter the same password and click the create button at the bottom of the screen.

12. Once the Create button is clicked, the user should receive a verification code sent to their business email used to register for ServicerConnect.

New User Setup

[X] Close

*Required Field

New Password

[_____] Show

Re-enter Password

[_____] Show

Password Requirements

Must contain:

8-15 Characters

At least one upper case letter

At least one lower case letter

At least one number

At least one special character (ex: ! *) % $)

Cannot contain:

Your first name, last name, email address or

User ID

Your previous 6 passwords

The name of a month (ex:march123)

3 or more repeating characters (ex:XYZ000)

Commonly used words or phrases (Ex:

password)

[Create]   Help

13. Follow the steps outlined in the verification code email:
   - Go to the Email Verification page on ServicerConnect
   - Type or copy & paste the token into the Email Verification Code field
   - Click the Complete Verification button

Verify Email

To complete the email verification process, enter the token code we sent you in an email message in the field below and click the Complete Verification button. If you did not receive the email message, click the Please Re-send button to receive a new code. When you have completed this process, the Email Information page will show your email address as being "verified".

Please note you will have limited functionality on our site until your email address is verified.

*

Email Verification Code: * [_____]

[Complete Verification] [Please Re-send]

13. Follow the steps outlined in the verification code email:
    - Go to the Email Verification page on ServicerConnect
    - Type or copy & paste the token into the Email Verification Code field
    - Click the Complete Verification button
    Note: The above token will expire in 5 days. You may generate a new token by clicking the Please Re-send button on the Email Verification page.
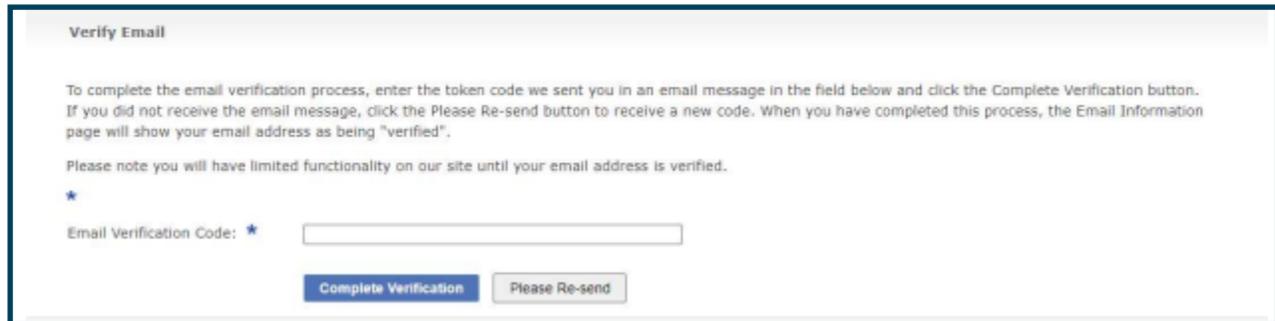
14. Next, click on the drop-down and select whether you are a Manager or Analyst.
   - If you are an Analyst, input your Manager's information (Name, Phone, E-mail)
    - Click the **Submit** button, Then select the **OK** button.

15. Sign **Out** of the site and wait for your e-mail notification.
    - Should you Sign On to ServicerConnect prior to receiving your approval e-mail, you will be advised that your status is pending and that your access to the system is restricted.

16. When your request for access is approved, you will receive an e-mail with the subject line "ServicerConnect Account Request Approved."
    - The text of the e-mail will include your new User Id, the access options available to you, and a list of your approved Investor Numbers.
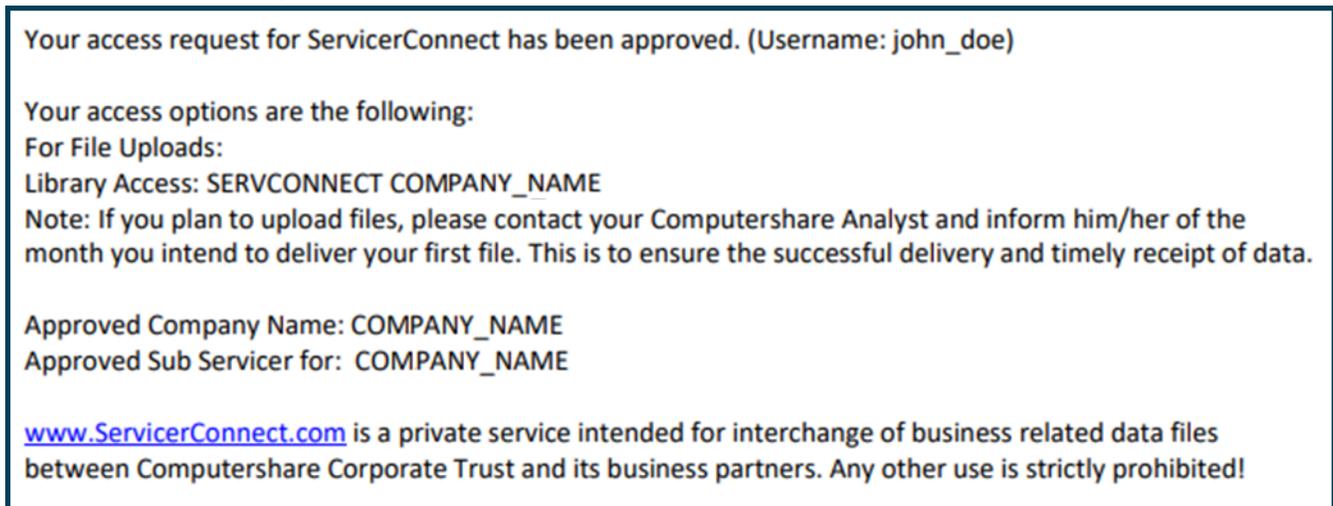
Please contact CTSLink Customer Service if you experience any issues registering:
    - 866-846-4526
    - ctslink.customerservice@wellsfargo.com