OCC Secure E-Mail Procedures for Users Outside the OCC

The Office of the Comptroller of the Currency has implemented a secure electronic mail system to provide you the integrity and confidentiality needed to protect information being transmitted through the Internet. This system is intended to provide a secure method for e-mail communication between OCC bank examiners and bank representatives. This solution secures and encrypts all email communications when designated by the OCC email user. Any OCC employee can initiate e-mail to anyone else with an Internet e-mail address. Recipients of these e-mails can retrieve and reply securely to the messages by following the procedures in this document.

To initiate submission of your SMALL BUSINESS LENDING PLAN to the OCC using SecureMail:

1. Access the OCC Zix secure email portal and Sign In through this link:
https://occsecuremail.banknet.gov/s/login?b=occ.

2. If you have already established an account, Sign In and skip to step 11 below.

3. If you are a first time user, click the link to r**egister** for a new account. This will take you to the next screen titled, "Register for your mailbox to send and receive secure messages".

4. Enter your email address.

5. Enter an appropriate password and password reminder phrase.

6. After you finish entering your information, click on **Submit Password**.

7. You will receive confirmation email from Zix sent to the e-mail address you specified to register your account. *Note:* The confirmation email is processed and sent to you immediately. Due to email traffic loads at your email provider, you may experience a delay of several minutes before receiving the confirmation email.

8. The confirmation email will contain an activation link and all necessary instructions to activate your new password. Click on the activate password link to activate your password. Unless you forget your password or would like to change to a new password, you will not be required to perform this process again.

9. If your password is not activated, when you attempt to logon to OCC SecureMail in the future you will see this prompt, "**You have not yet confirmed your OCC Secure Mail password. Please go to your email inbox and respond to the confirmation email message that we have sent you.**"

10. After you have activated your password and successfully login, use the steps below to create an email message to send the OCC your small business lending plan.

11. **Click on the Compose tab to create your email message.**

12. Type the name of the recipient: HQ.Licensing@occ.treas.gov

13. Type SBLF Program in the subject of the message

14. Click on Attach File

15. Browse to the location of your completed small business lending plan

16. Select the document and click Open to attach the file in your e-mail

17. Click on Attach File and Done

18. Click Send to forward your message to the OCC

To open an email message from the OCC using SecureMail:

Receiving OCC Secure Messages
When an OCC employee sends you an encrypted e-mail message, you will not get the text of the message directly into your mailbox. You will receive only a notification that an encrypted e-mail has been sent to you, who it was from, and the subject. Follow the link in the message to retrieve the message on the web portal.

Registering for OCC Secure E-Mail
• If you have not registered for OCC encrypted mail, you will be prompted to register a password before you can read the message. Registration is a one-time, quick and easy process.

• When the Registration screen appears, simply enter a new password twice and click "Submit Password"

Note: PASSWORD RULES
Passwords must be at least eight characters and must meet the following conditions:
   • Contain both alphabetic and numeric characters
   • Contain both uppercase and lowercase characters