



WHEDA-Connect Helpful Tips

The following are helpful tips designed to maximize the User experience with the WHEDA-Connect.com data and document portal:

Helpful Tip #1

When registering a loan or requesting a lock, review the Conventional Program Type (Conforming vs. Conforming FTHB) and PMI Type (HFA Preferred Risk Sharing No MI vs. HFA Preferred with MI) prior to registration or lock request. Incorrectly registered programs can lead to errors and/or delays.

Helpful Tip #2

If an error is made, there's no need to create a second loan. From the Registration Screen, simply change the incorrect data and re-click the "Price" Button. From the Pipeline Screen, click the loan number and then click "run pricing/request lock" to return to the Registration Screen.

Helpful Tip #3

If you click the "Price" Button, but the program you are looking to register or lock doesn't show up as an eligible loan program, click the + symbol next to "Display Ineligible Loan Programs." The reason for the ineligible result should be displayed.

Helpful Tip #4

When registering or requesting a lock for a transaction that includes a WHEDA Easy Close loan, before registering or requesting the lock, click the "view more" box and select the correct interest rate that lines up with the primary loan program.

Helpful Tip #5

Although a majority of WHEDA's doc types are listed in the Edocs document folder, each document does not need to be uniquely identified. Documents can be lumped together and uploaded in chunks. Be aware of the file size, however. There is an upload file size limit of 50mb. Large files; especially files with a large number of pages or a color Appraisal, can cause an upload to stall or fail.

Helpful Tip #6

Upon initial document submission, Users are required to resolve the "Send Task." Resolving the Send Task informs WHEDA's processing department that the application is ready to proceed to WHEDA's underwriters for review.

Helpful Tip #7

The Send Task will not generate if the Loan Program isn't registered. Additionally, either certain versions of internet browser or the task not being directly assigned to you, can cause "0 tasks" to display as the total in the Loan Pipeline Screen. However, if you click the "0 Tasks" link, the task will be listed in both instances.

Helpful Tip #8

You only need to resolve the Send Task at time of initial document submission to WHEDA. Once a file has been reviewed by a WHEDA underwriter, the underwriter's name is attached to the file and he or she will automatically be informed of any subsequent document uploads.

Helpful Tip #9

The Send Task specifies the required documents that must be uploaded before the application progresses to WHEDA's underwriters. If any of these required documents are missing when the Send Task is resolved, WHEDA's Processors will assign the task back to the originating lender. After uploading the missing document(s), the Send Task will need to be resolved a second time.

Helpful Tip #10

Although not required, it is good practice to complete and include the Loan Application Package Checklist (Form 6) when uploading documents to WHEDA-Connect. The Loan Application Package Checklist helps WHEDA processors catch submission errors early in the process.

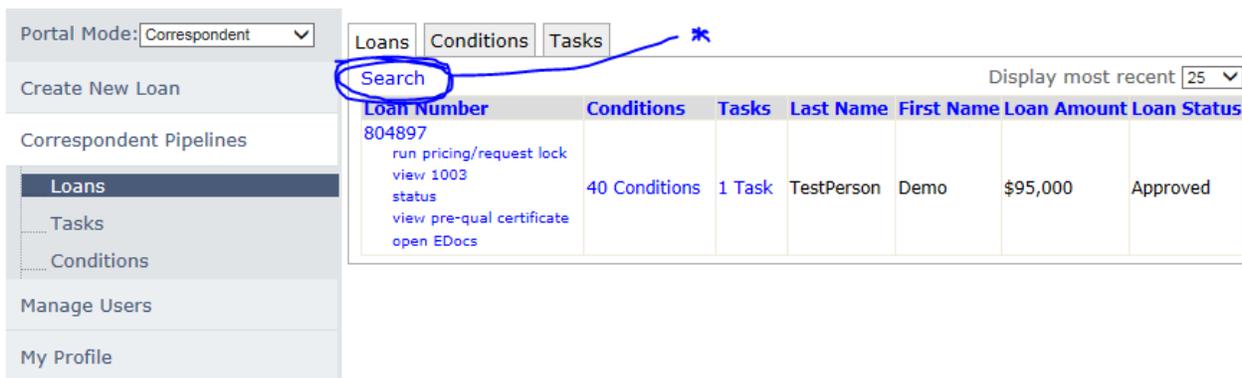
Quick Reference Guide

The Quick Reference Guide was designed to assist Users with the creation, registration, and submission process. It doubles as a checklist to help ensure all critical steps in the registration process are completed. The Quick Reference Guide is located on the Lender Toolkit Page of www.wheda.com under the "Lending Partners" drop down menu.

Other Common Questions or Problems

1. I can't see my loan!

- This is most frequently solved by clicking the Search link. It's an easy link to miss. It's located in the upper left hand corner of the screen:



The screenshot shows the WHEDA-Connect interface. On the left is a navigation menu with options: Portal Mode (Correspondent), Create New Loan, Correspondent Pipelines, Loans (highlighted), Tasks, Conditions, Manage Users, and My Profile. The main content area has tabs for Loans, Conditions, and Tasks. A blue circle highlights the 'Search' link in the top left of the main area. To the right of the search link is a dropdown menu for 'Display most recent' set to 25. Below this is a table with columns: Loan Number, Conditions, Tasks, Last Name, First Name, Loan Amount, and Loan Status. A single row is visible for loan number 804897.

Loan Number	Conditions	Tasks	Last Name	First Name	Loan Amount	Loan Status
804897 run pricing/request lock view 1003 status view pre-qual certificate open EDocs	40 Conditions	1 Task	TestPerson	Demo	\$95,000	Approved

- You can also change the number of loans displayed. Toggle between 25 and 100 here:



The screenshot shows the WHEDA-Connect interface with the 'Loans' tab selected. The 'Display most recent' dropdown menu is circled in blue, showing '25' and a dropdown arrow. To its right is a dropdown menu for 'Items with' set to '<--Any-->'. Below this is a table with columns: Loan Number, Conditions, Tasks, Last Name, First Name, Loan Amount, Loan Status, Status Date, and Lock Status L. A single row is visible for loan number 804897.

Loan Number	Conditions	Tasks	Last Name	First Name	Loan Amount	Loan Status	Status Date	Lock Status L
804897 run pricing/request lock view 1003 status view pre-qual certificate open EDocs	40 Conditions	1 Task	TestPerson	Demo	\$95,000	Approved	1/27/2016	

- Another frequent issue is that the User only has "individual" access. In this instance, you can only see loans assigned directly to you. If you aren't assigned to the loan as the Loan Officer, Processor, Secondary, or Post

Closer, you won't see it. If you have a job position that frequently has you working with all loans assigned to your company, ask your Delegated Administrator to switch you to "corporate" access. This will enable you to see all loans.

- Lastly, it's possible you are active in the wrong Portal Mode (channel). You can switch between channels here:

2. I don't see the Create New Loan option in the left hand menu in the Loan Pipeline Screen.

This is most likely because you don't have permission to create new loans. Contact your Delegated Administrator to enable this permission.

3. How do I get my name attached to the loan as the Loan Processor?

There are two options:

- During registration, depending on the channel, the applicable roles can be assigned at the top of the screen:



Loan Officer: Marty Maloney ([re-assign](#)) Processor: ([assign](#))
 Secondary: Marty Maloney ([re-assign](#)) Post-Closer: ([assign](#))

Loan Number	Loan Status	Name	Phone Number
806252	Registered	Demonstration Test Guy	

- If this step is missed during registration, the Processors name can be listed as the Contact Person on WHEDA Form 7. If Form 7 is uploaded as mentioned in Helpful Hint #10, WHEDA staff will add the Contact Person's name to the file as the Processor.

4. I'm trying to lock, but the system won't allow me to change the loan amount or property address.

Loans in certain status's (Approved, Suspense, Clear to Close) cannot be edited. When the User is requesting a lock, they will be taken to a verification screen before submitting their final request. There is a "Message to Lender" box in that screen.

Click Confirm to lock the rate. Note that by doing so you may lose edit access.

Product Name	FTHB HFA Preferred Risk Sharing No MI Correspondent 30 year
Rate Lock Period	45 Days
Rate Lock Expiration Date	3/31/2016 (Assumes a 45-day lock.)
Qualify Rate	4.000
Note Rate	4.000
Price	102.000
Payment	453.54
DTI	25.118

WARNING: Worst case pricing will apply if lock is broken. Register now and lock later if you are unsure about the closing date.

Request Type Register Loan Lock Rate

Message to Lender

Please change address to 123 Main Street.

The User can type a loan amount or address change request in the Message to Lender box. The change request will be communicated to WHEDA's Lock Desk. Lock Desk staff will internally coordinate the change.

