



Uploading Loan Documents

When uploading documents, it is important to note, the system allows for a total of 6 PDF's to be uploaded at a time, with a total upload size of 50MB's.

To upload documents

- From the pipeline screen
- Click on loan number
- Click on E-Docs on the left hand menu
- Click on the Upload Docs tab

A screenshot of the "E-docs" upload interface. On the left is a vertical sidebar menu with items: "Status and Agents", "Application Information", "Pricing", "Loan Information", "Rate Lock", "E-docs" (highlighted in yellow), "Tasks (0)", and "Conditions (0)". The main content area has a header "E-docs" and three tabs: "Upload Docs" (highlighted in yellow), "Fax Docs", and "Document List". Below the tabs, a message states: "You may upload up to 6 PDFs at a time with a total upload size of 50MB." There is a table with two columns: "Doc Type / Application" and "File Upload". The table is currently empty, showing "No Doc Type Selected *". Below the table, there is a dropdown menu with "John Homeowner & Mary Homeowner" selected, a "CHOOSE FILE" button, and the text "No file chosen". At the bottom, there are two buttons: "ADD DOC" and "UPLOAD DOCS".

Selecting a Document

Click on "Select Doc Type"

A close-up screenshot of the document selection area. It shows the "E-docs" header and the "Upload Docs" tab. The message "You may upload up to 6 PDFs at a time with a total upload size of 50MB." is visible. The table has the same structure as in the previous screenshot, but the "select Doc Type or scan barcodes" text is highlighted in yellow. The dropdown menu is also visible, showing "John Homeowner & Mary Homeowner".

Choose the Document Folder – the Folders are dependent upon an institution’s delivery channel.

- Note: It is important to select the correct upload folder in order to view the correct document list.

Select a Doc Folder [X]

Search for: SEARCH Q

Choose a Doc Folder:

Folder

- *** 1 BROKER UPLOAD
- *** 2 MINI CORR UPLOAD
- *** 3 CORRESPONDENT UPLOAD
- *** 4 INCOME EVALUATION UPLOAD

Choose the Document Type to be uploaded.

Select a Doc Type [X]

Folders > *** 1 BROKER UPLOAD

Search for: SEARCH Q

Choose a Doc Type:

Doc Type

- 1 BROKER INITIAL APPLICATION DOCUMENTS
- 2 BROKER FHA CASE NUMBER ASSIGNMENT
- 3 BROKER PROPERTY
- 4 BROKER CONDITIONS
- 5 BROKER FUNDING REQUEST
- 6 BROKER CLOSING DOCUMENTS
- 7 BROKER TRAILING DOCUMENTS

To view the documents that should be uploaded to each Document Type, click on the Document Type below.

- For Broker Upload the Document Type choices are:
 - [Initial Application Documents](#)
 - [FHA Case Number Assignment](#)
 - [Property](#)
 - [Conditions](#)
 - [Funding Request](#)
 - [Closing Documents](#)
 - [Trailing Documents](#)

Uploading a Document

Once a Document Folder and a Document Type have been chosen, the “Choose File” button is available to click on.

- Click on Choose File button
- Browse to where the PDF file is located
- Click on the document file

E-docs

[Upload Docs](#) [Fax Docs](#) [Document List](#)

You may upload up to 6 PDFs at a time with a total upload size of 50MB.

Doc Type / Application	File Upload	Description
*** 1 BROKER UPLOAD : 1 BROKER INITIAL APPLICATION DOCUMENTS select Doc Type or scan barcodes John Homeowner & Mary Homeowner ▾	CHOOSE FILE No file chosen *	<input type="text"/> 0 of 200 characters

[ADD DOC](#) [UPLOAD DOCS](#)

To add another document:

- Click on “Add Doc”. You can upload up to 6 PDF’s at a time with a total upload size of 50MB

Once the documents have been chosen:

- Click on “Upload Docs”

E-docs

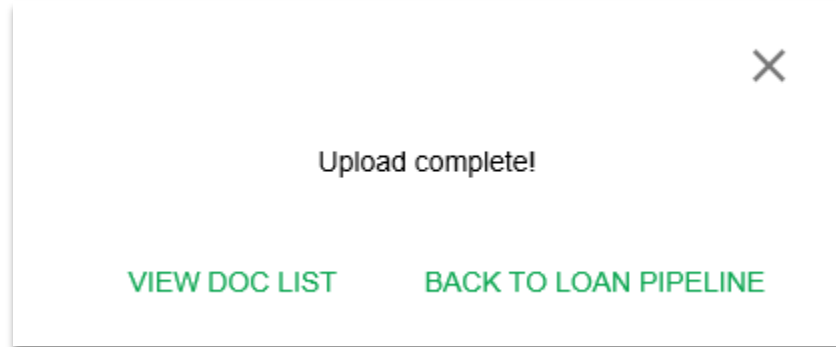
[Upload Docs](#) [Fax Docs](#) [Document List](#)

You may upload up to 6 PDFs at a time with a total upload size of 50MB.

Doc Type / Application	File Upload	Description
*** 1 BROKER UPLOAD : 1 BROKER INITIAL APPLICATION DOCUMENTS select Doc Type or scan barcodes John Homeowner & Mary Homeowner ▾	CHOOSE FILE favorite-family-recipes-cookbook.pdf	<input type="text"/> 0 of 200 characters

[ADD DOC](#) [UPLOAD DOCS](#)

Once the Documents(s) are uploaded an Upload Complete message will appear.



Viewing your Documents

The Document List tab includes all documents you have uploaded as well as any documents issued by WHEDA.

- From the pipeline screen
- Click on loan number
- Click on E-Docs on the left hand menu
- Click on the Document List tab



The screenshot shows the 'E-docs' interface. On the left is a sidebar menu with options: Status and Agents, Application Information, Pricing, Loan Information, Rate Lock, E-docs (highlighted), Tasks (0), and Conditions (0). The main area is titled 'E-docs' and has three tabs: 'Upload Docs', 'Fax Docs', and 'Document List' (highlighted). Below the tabs is a table with the following data:

Status	Doc Type	Application	Description	Created Date	Pages
view PDF	*** 1 BROKER UPLOAD - 1 BROKER INITIAL APPLICATION DOCUMENTS	John Homeowner Mary Homeowner		12/15/2017 1:38:03 PM	70

The documents issued by WHEDA will include:

- Rate Lock Confirmation
- Approval Certificates
- Suspense Certificates
- Funding/Purchase Advice
- Credit Denial / Adverse Action
- Loan Transmittal
- Final DO/DU® Findings

