



## 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

The screenshot shows a web application interface for uploading documents. On the left is a vertical sidebar menu with items: Status and Agents, Application Information, Pricing, Loan Information, Rate Lock, E-docs (highlighted), Tasks (0), and Conditions (0). The main content area is titled "E-docs" and has three tabs: "Upload Docs" (highlighted), "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." The interface is divided into two columns: "Doc Type / Application" and "File Upload". Under "Doc Type / Application", it says "No Doc Type Selected \*", "select Doc Type or scan barcodes", and a dropdown menu with "John Homeowner & Mary Homeowner" selected. Under "File Upload", there is a green "CHOOSE FILE" button and the text "No file chosen". At the bottom, there are two green buttons: "ADD DOC" and "UPLOAD DOCS".

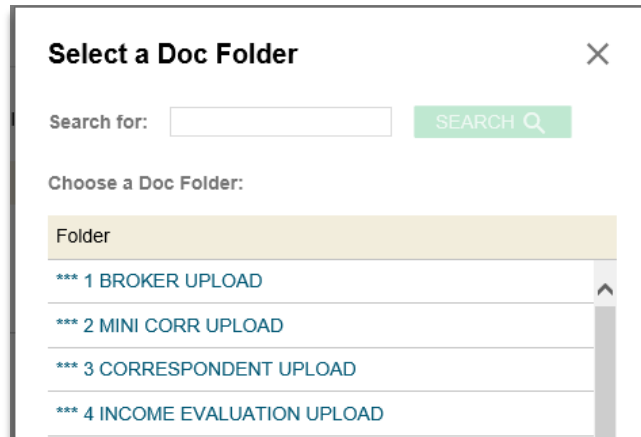
## Selecting a Document

Click on "Select Doc Type"

This is a close-up view of the "E-docs" upload interface. It shows the "Upload Docs" tab selected. The message "You may upload up to 6 PDFs at a time with a total upload size of 50MB." is visible. The "Doc Type / Application" column contains the text "No Doc Type Selected \*", "select Doc Type or scan barcodes" (with "select Doc Type" highlighted), and a dropdown menu showing "John Homeowner & Mary Homeowner". The "File Upload" column shows a green "CHOOSE FILE" button and "No file chosen". At the bottom, the "ADD DOC" and "UPLOAD DOCS" buttons are visible.

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]

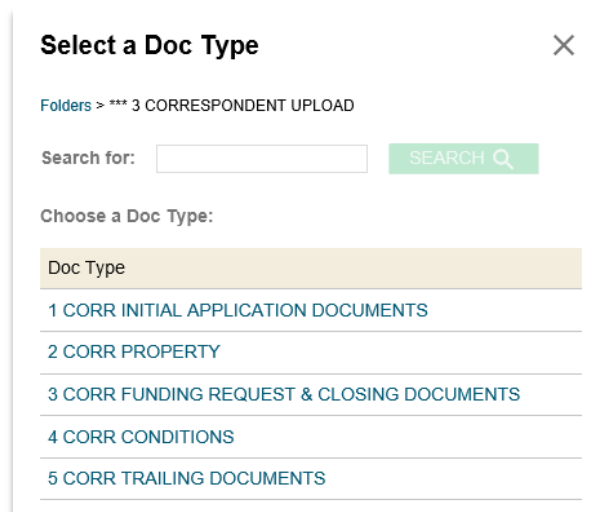
Search for:  SEARCH Q

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 > \*\*\* 3 CORRESPONDENT UPLOAD

Search for:  SEARCH Q

Choose a Doc Type:

Doc Type

- 1 CORR INITIAL APPLICATION DOCUMENTS
- 2 CORR PROPERTY
- 3 CORR FUNDING REQUEST & CLOSING DOCUMENTS
- 4 CORR CONDITIONS
- 5 CORR TRAILING DOCUMENTS

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

- For Correspondent Upload the Document Type choices are:
  - [Initial Application Documents](#)
  - [Property](#)
  - [Funding Request & Closing Documents](#)
  - [Conditions](#)
  - [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
*** 3 CORRESPONDENT UPLOAD : 1 CORR INITIAL APPLICATION DOCUMENTS <a href="#">select Doc Type or scan barcodes</a> John Homeowner & Mary Homeowner	<a href="#">CHOOSE FILE</a> 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

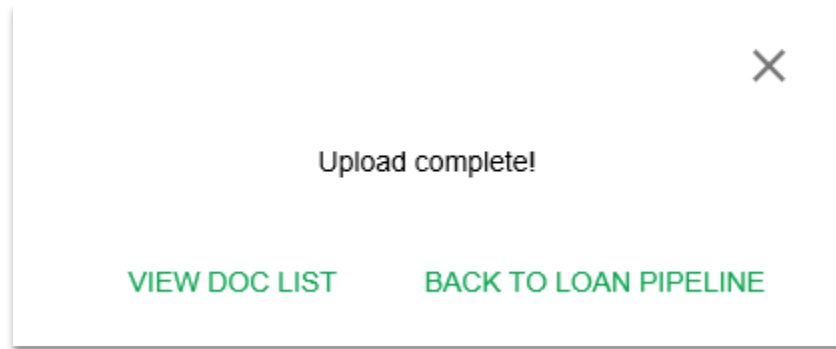
[Upload Docs](#) [Fax Docs](#) [Document List](#)

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

Doc Type / Application	File Upload	Description
*** 3 CORRESPONDENT UPLOAD : 1 CORR INITIAL APPLICATION DOCUMENTS <a href="#">select Doc Type or scan barcodes</a> John Homeowner & Mary Homeowner	<a href="#">CHOOSE FILE</a> Corr Conditions.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 a web interface with a left-hand navigation menu and a main content area. The navigation menu includes: Status and Agents, Application Information, Pricing, Loan Information, Rate Lock (with a lock icon), E-docs (highlighted), Tasks (0), and Conditions (0). The main content area is titled 'E-docs' and has three tabs: 'Upload Docs', 'Fax Docs', and 'Document List' (which is selected and underlined). Below the tabs is a table with the following data:

Status	Doc Type	Application	Description	Created Date	Pages
<a href="#">view PDF</a>	*** 3 CORRESPONDENT UPLOAD - 1 CORR INITIAL APPLICATION DOCUMENTS	John Homeowner Mary Homeowner		1/2/2018 8:47:21 AM	1

The documents issued by WHEDA will include:

- Rate Lock Confirmation
- Approval Certificates
- Suspense Certificates
- Funding/Purchase Advice
- Credit Denial / Adverse Action

