



## WISCONSIN HOUSING AND ECONOMIC DEVELOPMENT AUTHORITY

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## Lender Update 2015-03

April 7, 2015

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### **WHEDA-Connect Quick Reference Guide**

The WHEDA-Connect Portal has been active for several weeks. Early activity has been better than anticipated. We appreciate our partner lenders patience as they work with and familiarize themselves with this new system. Users seem to have easily acclimated themselves to the electronic document (Edoc) portion of the system, however, a few challenge points have been identified regarding the process of creating, registering, and submitting loan applications. In response to these challenges, we have prepared a two page, 5 step Quick Reference Guide to assist Users with the creation, registration, and submission process. The Quick Reference Guide is located on the [Toolkit Page](#) of [www.wheda.com](http://www.wheda.com) under the header "Doing Business with WHEDA."

### **WHEDA Connect On-Demand Training Webinars**

Pre-recorded Webinars are available for viewing. Subjects covered include:

- Broker and Mini-Corr channel submission
- Correspondent channel submission
- Delegated Administrator responsibilities of adding and editing Users

If you need training or need a "refresher", the webinars are an excellent resource.

A link to these On-Demand Training Webinars is located on the [Toolkit Page](#) of [www.wheda.com](http://www.wheda.com) under the header "Doing Business with WHEDA."

## **Helpful Hints**

The following Helpful Hints should help **maximize the user experience** when navigating through the WHEDA-Connect Portal:

- Once you've created a new loan, the loan program must be registered. Please reference either the [WHEDA-Connect User's Manual](#) or the new [WHEDA-Connect Quick Reference Guide](#) for procedure details.
- Upon registering your newly created loan, you will be assigned a task. The task informs you what documents need to be uploaded and instructs the User to "resolve" the task once the required documents have been uploaded. If the task does not get resolved, **WHEDA's Processing Department will not receive notification that the file is ready for processing.**
- Lenders receive a Registration Certificate shortly after registering a new loan application via the Portal. The Registration Certificate identifies the loan as being "Pre-Qualified." The term Pre-Qualified means the submitted loan data successfully passed the eligibility check that is engrained into the Portal. **This does not constitute a guarantee that your loan is approved.** It merely ensures the loan will be reviewed by a WHEDA Underwriter.
- Although not required, it is good practice to complete and upload the Loan Application Package Checklist (Form 6) when uploading documents to the Portal. The Loan Application Package Checklist helps WHEDA processors catch submission errors early in the process.
- Conditions and Tasks, depending upon your internet browser, may take 5-10 minutes to appear in your Pipeline. However, if you click the "0 Conditions" or "0 Tasks" link, the conditions and tasks are available and will be listed.
- The role of the Delegated Administrator is to add and edit your lending institution's Users. However, the Delegated Administrator cannot edit his or her own profile. These edits must be done by WHEDA. Please contact us if you are a Delegated Administrator and need your profile edited.

## **WHEDA-Connect Contact List**

We are committed to ensuring our partner lenders have a "user-friendly" experience with the WHEDA-Connect Portal. Dedicated staff members are available via phone or email. Please do not hesitate to contact us with questions or problems related to the Portal. Contacts are:

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## **Clarification regarding WHEDA's use of the term "going paperless"**

WHEDA successfully transitioned into a paperless work environment in the Fall of 2014. The WHEDA-Connect Portal further enables us to extend this paperless functionality to our partner lenders. Portal use will be required beginning October 1, 2015. However, we would like to clarify this does not mean our partner lenders are required to also have a paperless workflow established in order to continue business with WHEDA. Paper documents can be easily scanned as a PDF, saved on a network drive, and uploaded to the Portal. Please contact us with questions or concerns.

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## **Who to Contact – Your WHEDA Team**

### ***Management:***

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## **Lender Update Archive**

