



## Uploading Loan Documents

When uploading documents, it is important to note the following:

1. The system allows for a total of 12 PDF's to be uploaded at a time, with a total upload size of 100MB's. Documents should be uploaded in bulk rather than individually.
2. Documents should only be uploaded to the 1st loan.

### Step 1: Select the Loan

- From the pipeline screen, click on the loan number
- Click on E-Docs on the left-hand menu, make sure you are on the Upload Docs tab
- Click on the "Or Select Files to Upload" button or Drag & Drop the files into the gray box pictured below

The screenshot shows the 'Upload Docs' interface. At the top, there are tabs for 'Upload Docs', 'Fax Docs', and 'Document List'. A 'SUBMIT TO DOCUMENT CHECK' button is visible in the top right. Below the tabs, a message states: 'You may upload up to 12 documents at a time with a total upload size of 100MB.' A large gray box with a dashed border contains a cloud icon and the text 'Drag and Drop Files Here to Upload' and 'OR SELECT FILES TO UPLOAD'. Below this box, a table lists two uploaded documents:

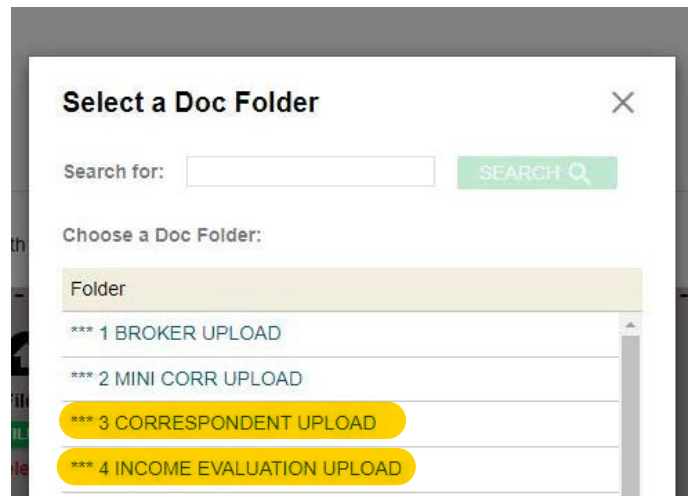
File Name	Doc Type *	Description	Internal Comments	Selected Application
Sample 1.pdf	[select Doctype] scan barcodes *** 1 BROKER UPLOAD : 1 BROKER INITIAL APPLICATION DOCUMENTS	0 of 200 characters	0 of 200 characters	Jacob TEST DF (Bindi) & Shanda TEST URLA (Strack) ▼
Sample 2.pdf	[select Doctype] scan barcodes	0 of 200 characters	0 of 200 characters	Jacob TEST DF (Bindi) & Shanda TEST URLA (Strack) ▼

### Step 2: Index the Document

- Click on "Select Doc Type"

This screenshot is identical to the previous one, but with the 'Doc Type' dropdown menu for the first document open. The dropdown menu is highlighted with a yellow circle, showing the text '[select Doctype] scan barcodes \*\*\* 1 BROKER UPLOAD : 1 BROKER INITIAL APPLICATION DOCUMENTS'.

- Choose the Document Folder – the folders are dependent upon an institution’s delivery channel and what the lender is trying to accomplish.
  - o Note: It is important to select the correct upload folder to view the correct document list.



- Choose the Document Type to be uploaded.



What Lender is Trying to Accomplish	Doc Folder	Doc Type	Description Field
Application Package	***3 CORRESPONDENT UPLOAD	1 CORR INITIAL APPLICATION DOCUMENTS	
Closing Package Funding Request	***3 CORRESPONDENT UPLOAD	3 CORR FUNDING REQUEST & CLOSING DOCUMENTS	
Appraisal	***3 CORRESPONDENT UPLOAD	2 CORR PROPERTY	
Docs to clear conditions from WHEDA Underwriters	***3 CORRESPONDENT UPLOAD	4 CORR CONDITIONS	
Income Evaluation Request	***4 INCOME EVALUATION UPLOAD	1 INCOME EVALUATION APPLICATION	Income Evaluation Request
Trailing Docs	***3 CORRESPONDENT UPLOAD	5 CORR TRAILING DOCUMENTS	

### Step 3: Uploading a Document

Once a Document Folder and a Document Type have been chosen, the "Or Select Files to Upload" button is available to click on.

- Click on "Or Select Files to Upload" button
- Browse to where the PDF file is located
- Click on the document file

The screenshot shows a web interface for document upload. At the top, there are navigation tabs: "Upload Docs" (highlighted in yellow), "Fax Docs", and "Document List". A green button labeled "SUBMIT TO DOCUMENT CHECK" is visible in the top right. Below the tabs, a message states: "You may upload up to 12 documents at a time with a total upload size of 100MB." A large dashed box contains a cloud upload icon and the text "Drag and Drop Files Here to Upload" and "OR SELECT FILES TO UPLOAD". Below this, it says "2 of 12 files selected for upload".

File Name	Doc Type *	Description	Internal Comments	Selected Application
Sample 1.pdf	[select Doctype] scan barcodes *** 1 BROKER UPLOAD - 1 BROKER INITIAL APPLICATION DOCUMENTS	0 of 200 characters	0 of 200 characters	Jacob TEST DF (Bindl) & Shanda TEST URLA (Strack) ▼
Sample 2.pdf	[select Doctype] scan barcodes	0 of 200 characters	0 of 200 characters	Jacob TEST DF (Bindl) & Shanda TEST URLA (Strack) ▼

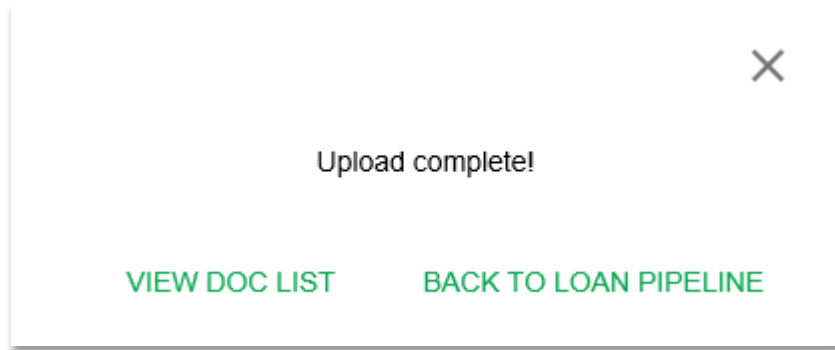
To add another document:

- Click on "Or Select Files to Upload" button. You can upload up to 12 PDF's at a time with a total upload size of 100MB's.
- Upload multiple documents all at once in bulk rather than uploading documents individually.

Once the documents have been chosen and indexed, click on "Submit to Document Check" button.

This screenshot is identical to the one above, but with the "SUBMIT TO DOCUMENT CHECK" button highlighted in yellow. The table below the upload area shows the same two documents: "Sample 1.pdf" and "Sample 2.pdf", each with a "Doc Type" dropdown menu and character count fields.

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



#### Step 4: 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
- Click view PDF

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 in yellow), Tasks (0), and Conditions (0). The main content area is titled "E-docs" and has three tabs: "Upload Docs", "Fax Docs", and "Document List" (highlighted in yellow). Below the tabs is a table with the following data:

Status	Doc Type	Application	Description	Created Date	Pages
<a href="#">view PDF</a>	*** 2 MINI CORR UPLOAD - 1 MINI CORR INITIAL APPLICATION DOCUMENTS	John Homeowner Mary Homeowner		1/2/2018 8:38:06 AM	1

The documents issued by WHEDA may include:

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

