



Uploading Loan Documents

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

1. The system allows for a total of 12 PDFs 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 Document to be Uploaded

- 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 PDFs you would like to upload into the gray box pictured below

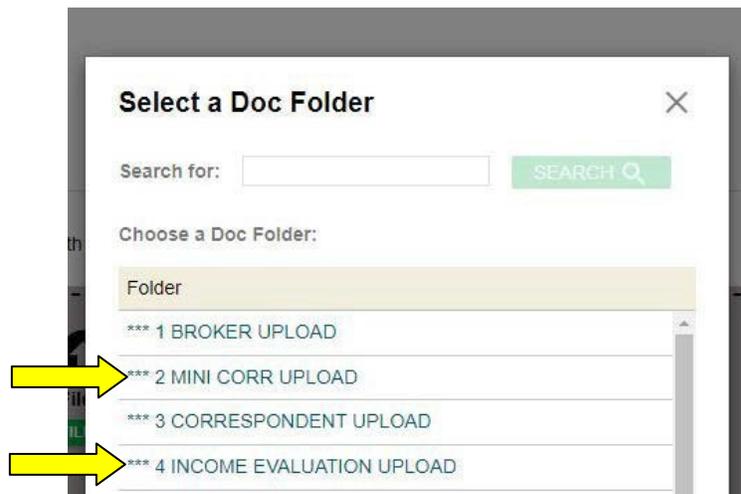
The screenshot shows the 'E-docs' interface with the 'Upload Docs' tab selected. A message states: "You may upload up to 12 documents at a time with a total upload size of 100MB." Below this is a large gray box labeled "Files to Upload" with a dashed border. Inside the box, there is a cloud icon and the text "Drag and Drop Files Here to Upload" and "OR SELECT FILES TO UPLOAD". Below that, it says "0 of 12 files selected for upload". A yellow arrow points to the "OR SELECT FILES TO UPLOAD" button. Below the box is a table with columns: File Name, Doc Type, Description, Internal Comments, and Selected Application. The table is currently empty and has the text "Waiting for files..." below it.

Step 2: Index the Document

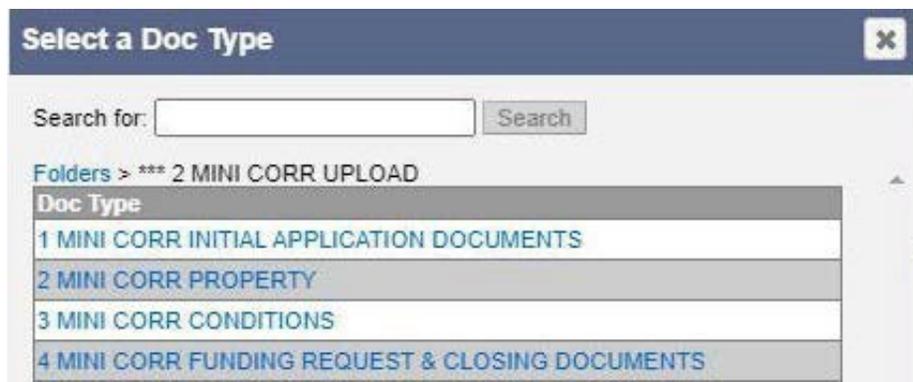
- Click on "Select Doc Type"

The screenshot shows the 'E-docs' interface with the 'Upload Docs' tab selected. A message states: "You may upload up to 12 documents at a time with a total upload size of 100MB." Below this is a large gray box labeled "Files to Upload" with a dashed border. Inside the box, there is a cloud icon and the text "Drag and Drop Files Here to Upload" and "OR SELECT FILES TO UPLOAD". Below that, it says "1 of 12 files selected for upload". A yellow arrow points to the "OR SELECT FILES TO UPLOAD" button. Below the box is a table with columns: File Name, Doc Type, Description, Internal Comments, and Selected Application. The table has one row with the following data: File Name: "Test Upload.pdf"; Doc Type: "[select Doctype] scan barcodes *** 2 MINI CORR UPLOAD. 1 MINI CORR INITIAL APPLICATION DOCUMENTS"; Description: "0 of 200 characters"; Internal Comments: "0 of 200 characters"; Selected Application: "Test (Credit Report) Test". Below the table is an "UPLOAD DOCS" button.

- Then, 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.



- Add a description field if necessary
 - Repeat these steps for each document you want to upload.

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

Step 3: Upload the Document

- Once the documents have been chosen and indexed, click on "Upload Docs" button.

[SUBMIT TO DOCUMENT CHECK](#)

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

You may upload up to 12 documents at a time with a total upload size of 100MB.



Drag and Drop Files Here to Upload
OR SELECT FILES TO UPLOAD
1 of 12 files selected for upload

File Name	Doc Type *	Description	Internal Comments	Selected Application
Test Upload.pdf	[select Doctype] scan barcodes *** 2 MINI CORR UPLOAD : 1 MINI CORR INITIAL APPLICATION DOCUMENTS	<input type="text" value="0 of 200 characters"/>	<input type="text" value="0 of 200 characters"/>	Test (Credit Report) Test ▾


UPLOAD DOCS

After the system has processed the upload, a message will appear confirming the number of documents uploaded.

Upload Docs Fax Docs Document List

You may upload up to 12 documents at a time with a total upload size of 100MB.

Files to Upload:


Drag and Drop Files Here to Upload
OR SELECT FILES TO UPLOAD
0 of 12 files selected for upload

File Name	Doc Type *	Description	Internal Comments	Selected Application
Waiting for files...				

1 document uploaded.

UPLOAD DOCS

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”

Status and Agents

Application Information

Pricing

Loan Information

Rate Lock 

E-docs

Tasks (0)

Conditions (0)

E-docs

Upload Docs Fax Docs Document List

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

Step 5: Resolve the Task

Click on the Task tab from the left side menu to view all tasks relating to the specific loan. Resolving the task is one of the most critical steps in the loan process. It ensures a smooth workflow between the Lender and WHEDA. Clicking “Resolve” will notify WHEDA staff that the file is ready for WHEDA’s underwriters to review.

Status and Agents

Application Information

Pricing

Loan Information

Rate Lock

E-docs

Tasks (0)

Conditions (0)

Tasks

ADD NEW TASK **REFRESH** Display Task assigned to: **Anyone** Task #

Open Tasks

<input type="checkbox"/>	Status	Subject	Latest Comment or Task History Event
<input type="checkbox"/>	Active	Upload all Origination and Closing documents. Then Resolve this Task.	Opened and assigned by Task System 3/30/2023 8:33 AM PT view all

ASSIGN **RESOLVE** **SET FOLLOW-UP DATE** **EXPORT TO CSV** **EXPORT TO PDF**

Closed Tasks

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

