



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 dashed box contains a cloud icon and the text 'Drag and Drop Files Here to Upload' and 'OR SELECT FILES TO UPLOAD'. Below this, a table lists two files: 'Sample 1.pdf' and 'Sample 2.pdf'. The table has columns for 'File Name', 'Doc Type', 'Description', 'Internal Comments', and 'Selected Application'. The 'Doc Type' column for 'Sample 1.pdf' is highlighted with a yellow circle.

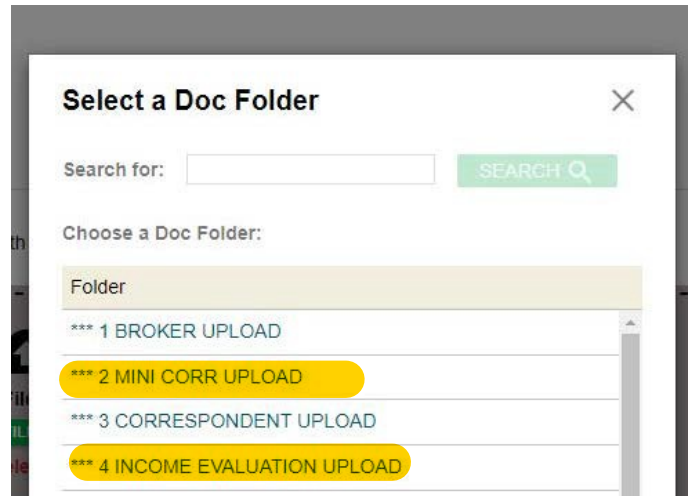
File Name	Doc Type *	Description	Internal Comments	Selected Application
Sample 1.pdf	[select Doctype] scan barcodes *** 1 BROKER UPLOAD : 1 BROKER INITIAL APPLICATION DOCUMENTS	0 of 200 characters	0 of 200 characters	Jacob TEST DF (Bindi) & Shanda TEST URLA (Strack) ▼
Sample 2.pdf	[select Doctype] scan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

Step 2: Index the Document

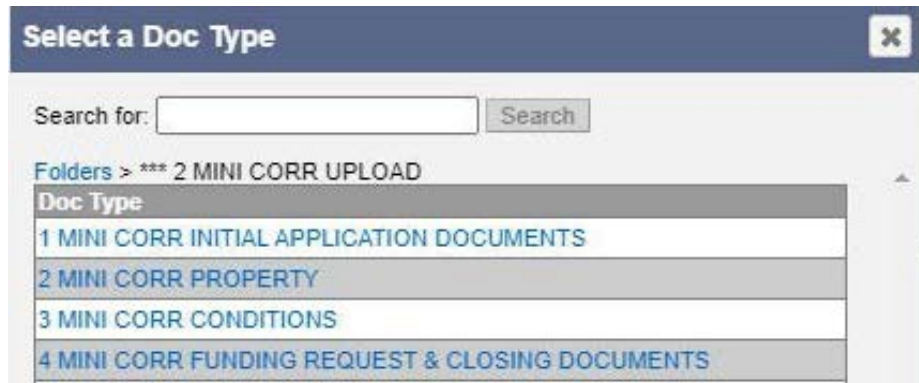
- Click on "Select Doc Type"

This screenshot is identical to the previous one, but the 'Doc Type' dropdown menu for 'Sample 1.pdf' is highlighted with a yellow circle, indicating the step of selecting the document type.

- Choose the Document Folder - the folders are dependent upon an institution's delivery channel and what the lender is trying to accomplish.
 - 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	***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: 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 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) ▼

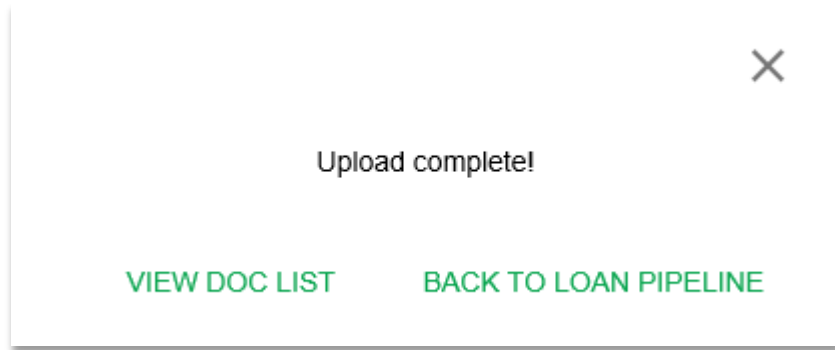
To add another document:

- 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 previous one, but the "SUBMIT TO DOCUMENT CHECK" button is now highlighted in yellow, indicating it is the next step in the process.

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 for 'E-docs'. On the left is a vertical sidebar menu with options: 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 has three tabs: 'Upload Docs', 'Fax Docs', and 'Document List' (highlighted in yellow). Below the tabs is a table with columns: Status, Doc Type, Application, Description, Created Date, and Pages. A 'view PDF' button is visible next to the first row of the table.

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

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

