



## 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

A screenshot of the "E-docs" upload interface. On the left is a vertical sidebar menu with items: "Status and Agents", "Application Information", "Pricing", "Loan Information", "Rate Lock", "E-docs" (highlighted in yellow), "Tasks (0)", and "Conditions (0)". The main content area has a header "E-docs" and three tabs: "Upload Docs" (highlighted in yellow), "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." A table with two columns, "Doc Type / Application" and "File Upload", is shown. The "Doc Type / Application" column contains the text "No Doc Type Selected \*", a link "select Doc Type or scan barcodes", and a dropdown menu currently showing "John Homeowner & Mary Homeowner". The "File Upload" column contains a green "CHOOSE FILE" button and the text "No file chosen". At the bottom of the interface are two green buttons: "ADD DOC" and "UPLOAD DOCS".

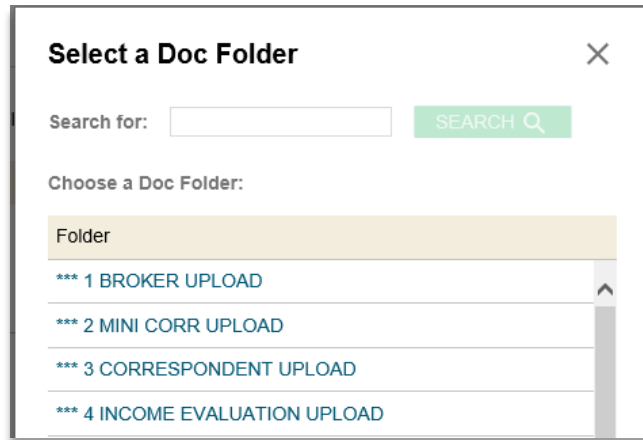
## Selecting a Document

Click on "Select Doc Type"

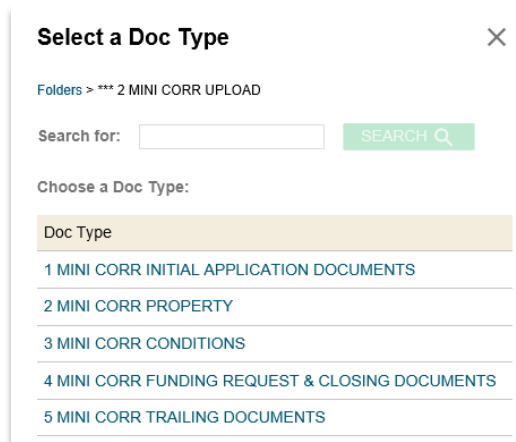
A close-up screenshot of the document selection dropdown menu. The "E-docs" header and "Upload Docs" tab are visible at the top. The dropdown menu is open, showing the text "No Doc Type Selected \*", a link "select Doc Type or scan barcodes" (highlighted in yellow), and a dropdown menu currently showing "John Homeowner & Mary Homeowner". Below the dropdown menu are two green buttons: "ADD DOC" and "UPLOAD DOCS".

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.



Choose the Document Type to be uploaded.



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

- For Mini Corr Upload the Document Type choices are:
  - [Initial Application Documents](#)
  - [Property](#)
  - [Conditions](#)
  - [Funding Request & Closing Documents](#)
  - [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
*** 2 MINI CORR UPLOAD : 1 MINI 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

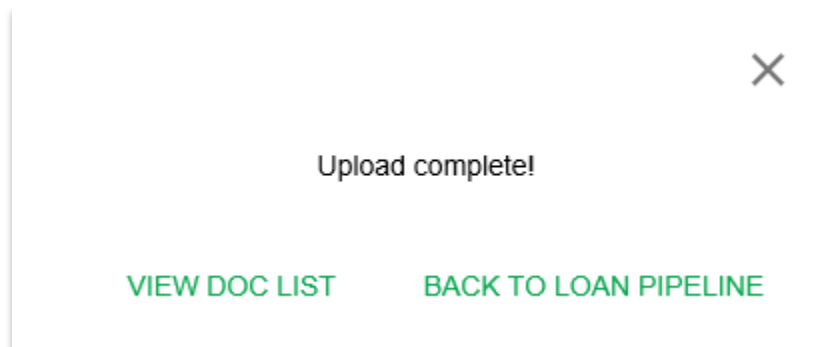
[Upload Docs](#) [Fax Docs](#) [Document List](#)

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

Doc Type / Application	File Upload	Description
*** 2 MINI CORR UPLOAD : 1 MINI CORR INITIAL APPLICATION DOCUMENTS <a href="#">select Doc Type or scan barcodes</a> John Homeowner & Mary Homeowner	<a href="#">CHOOSE FILE</a> Mini Corr Conditions.pdf	<input type="text"/> 0 of 200 characters

[ADD DOC](#) [UPLOAD DOCS](#)

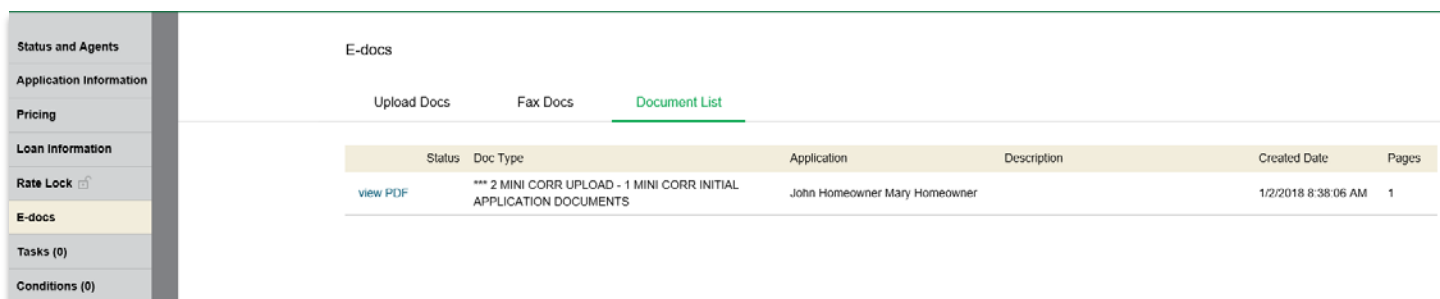
Once the Document(s) are uploaded an Upload Complete message will appear.



## 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 application interface. On the left is a sidebar menu with items: 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 underlined). 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 will include:

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

