



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

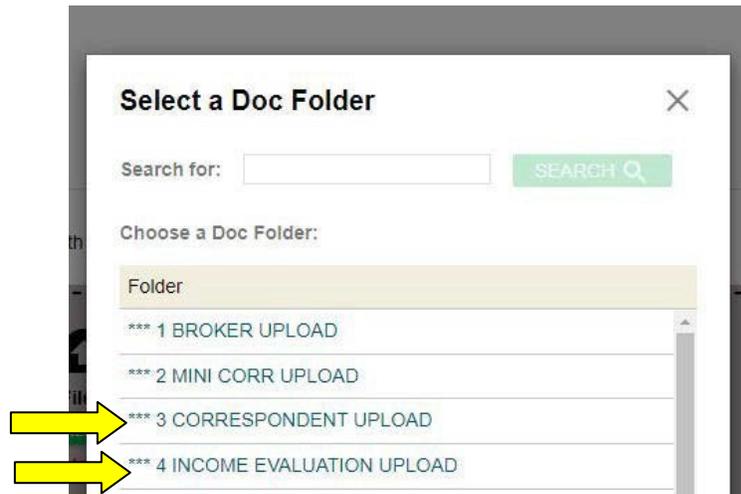
The screenshot shows the "E-docs" interface. At the top, there are tabs for "Upload Docs", "Fax Docs", and "Document List". A "SUBMIT TO DOCUMENT CHECK" button is visible on the right. Below the tabs, a message states: "You may upload up to 12 documents at a time with a total upload size of 100MB." The main area is a gray box labeled "Files to Upload" with a dashed border. Inside, it says "Drag and Drop Files Here to Upload" and "OR SELECT FILES TO UPLOAD". Below this, it indicates "0 of 12 files selected for upload". A yellow arrow points to the "OR SELECT FILES TO UPLOAD" button. Below the gray box is a table with columns: "File Name", "Doc Type *", "Description", "Internal Comments", and "Selected Application". The table is currently empty and has "Waiting for files..." below it. An "UPLOAD DOCS" button is at the bottom left.

Step 2: Index the Document

- Click on "Select Doc Type"

The screenshot shows the "E-docs" interface after one file has been selected. The "Files to Upload" area now shows "1 of 12 files selected for upload". Below the gray box, the table has one row. The "Doc Type *" column has a dropdown menu open, showing "[select Doctype] scan barcodes *** 3 CORRESPONDENT UPLOAD : 1 CORR INITIAL APPLICATION DOCUMENTS". A yellow arrow points to this dropdown menu. The "Description" column has a text input field with "0 of 200 characters" below it. The "Internal Comments" column has a text input field with "0 of 200 characters" below it. The "Selected Application" column has a dropdown menu with "Test (Credit Report) Test" selected. An "UPLOAD DOCS" button is at the bottom left.

- 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	***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: Upload the Document

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



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



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	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.

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

