WHEDA

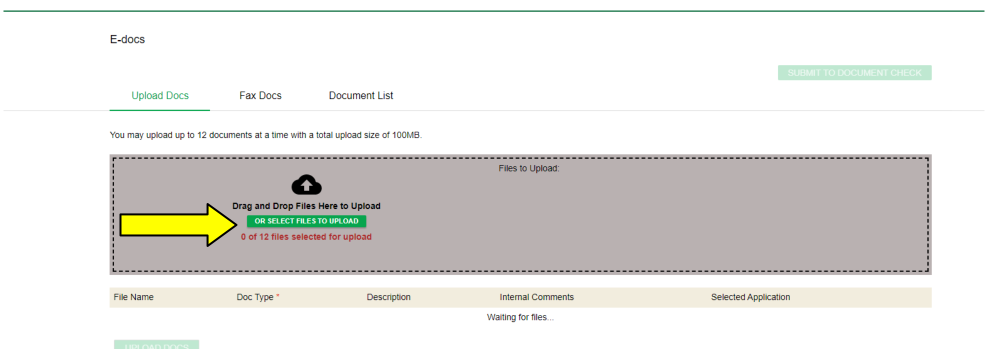
Uploading Loan Documents

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.

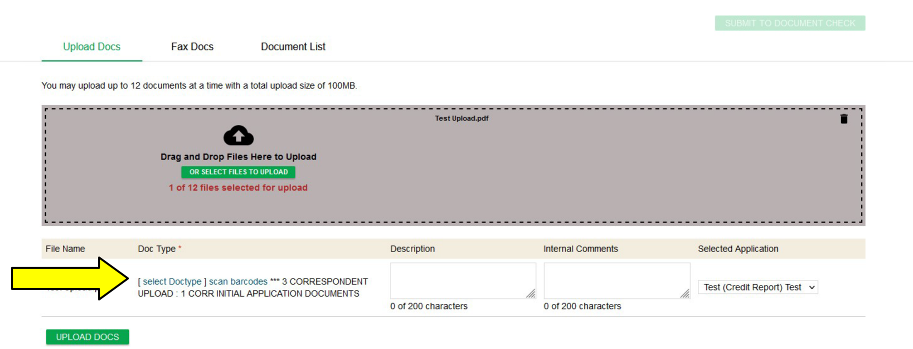
Step 1: Select the Document to be Uploaded

- 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

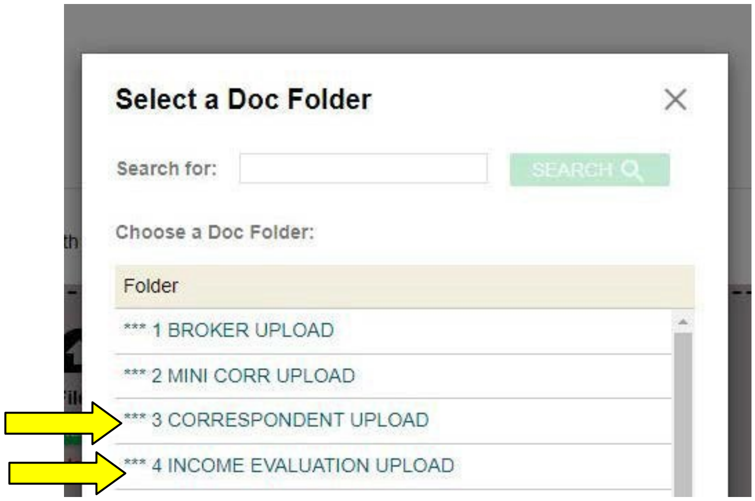


Step 2: Index the Document

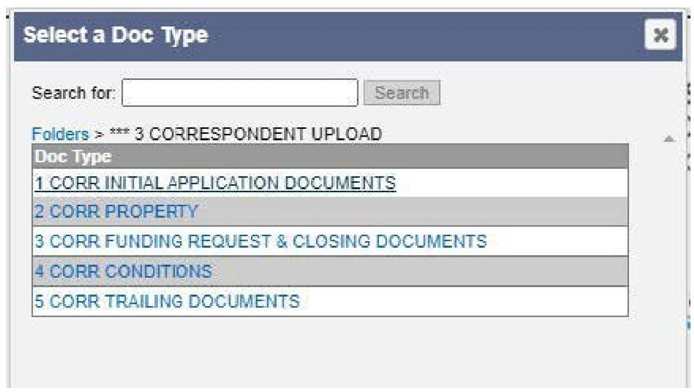
- Click on "Select Doc Type"



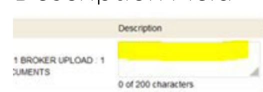
- Then, choose the Document Folder – the folders are dependent upon an institution’s delivery channel and what the lender is trying to accomplish.
  - o Note: It is important to select the correct upload folder to view the correct document list.



- Choose the Document Type to be uploaded.

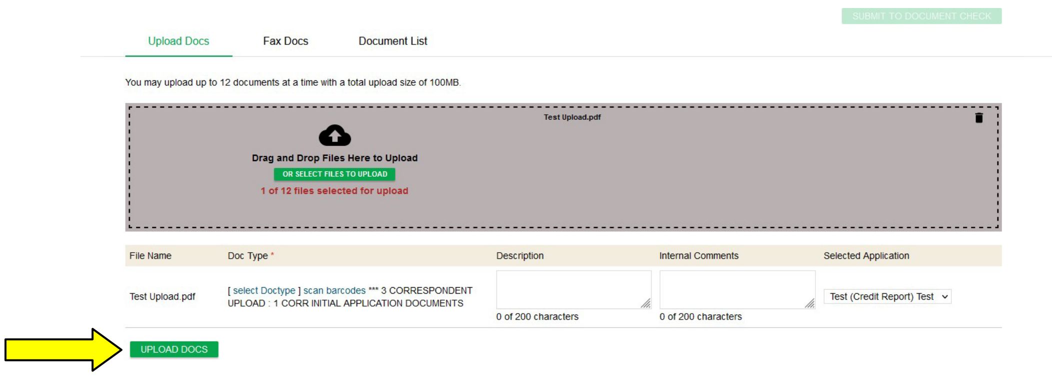


- Add a description field if necessary
- Repeat these steps for each document you want to upload.

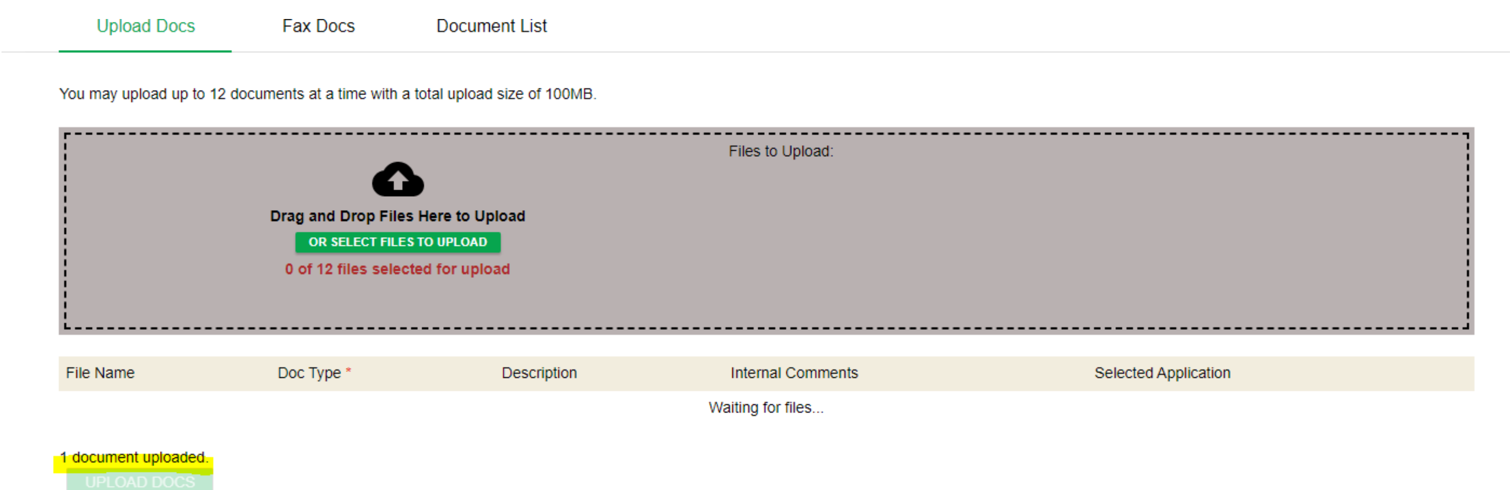
What Lender is Trying to Accomplish	Doc Folder	Doc Type	Description Field 
Application Package	***3 CORRESPONDENT UPLOAD	1 CORR INITIAL APPLICATION DOCUMENTS	
Closing Package Funding Request	***3 CORRESPONDENT UPLOAD	3 CORR FUNDING REQUEST & CLOSING DOCUMENTS	
Appraisal	***3 CORRESPONDENT UPLOAD	2 CORR 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.



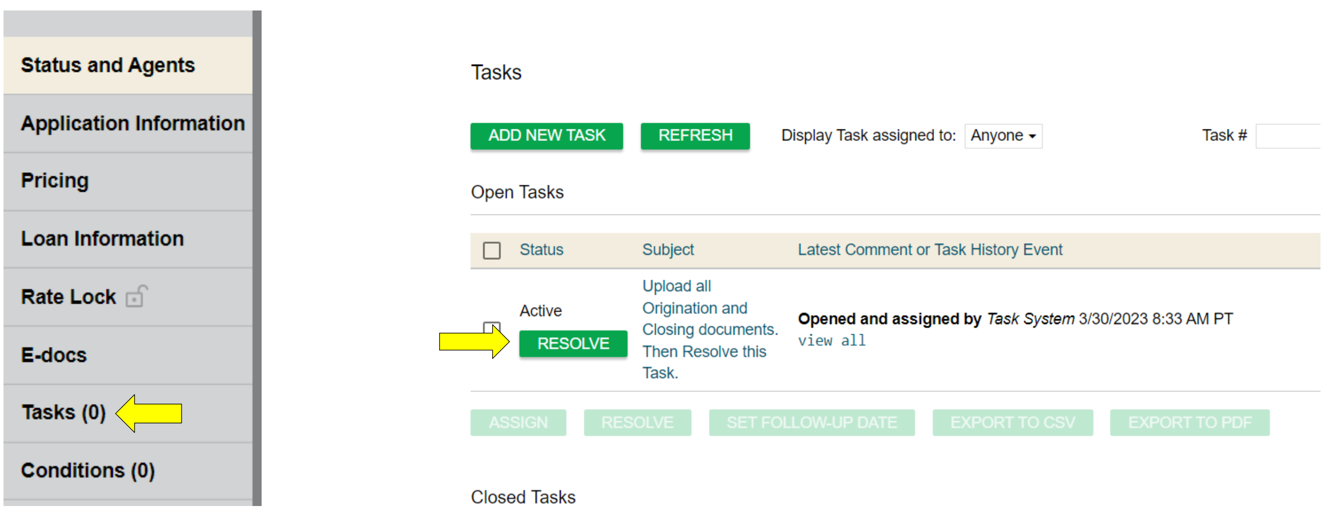
Step 4: Viewing your Documents

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”

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.



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

WHEDA