



AzIDA **Home+Plus** Lender Training

# How To Upload Documents In The Lender-Online Reservation System

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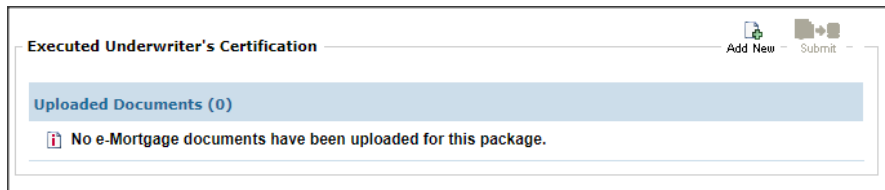
## How to upload documents in the Lender-Online reservation system

The process of uploading documents into the **HOME+PLUS** Lender-Online system is the same whether you are uploading:

- (1) Underwriter's Certification
- (2) Post-Closing DPA Compliance Package and or
- (3) trailing conditions or stips.

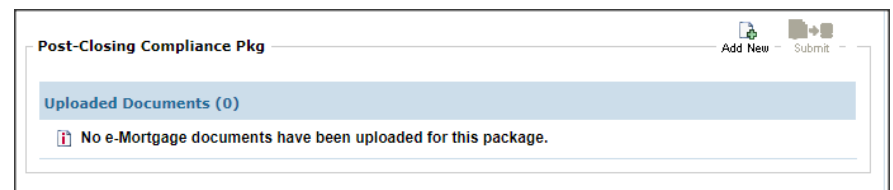
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- The Underwriter's Certification Documents goes here ...



The screenshot shows a web interface for uploading documents. At the top, it says "Executed Underwriter's Certification" with "Add New" and "Submit" buttons. Below this is a blue bar labeled "Uploaded Documents (0)". Underneath the bar, a message reads: "No e-Mortgage documents have been uploaded for this package."

- The Post-Closing Compliance Package (and any conditions or trailing docs) goes here .....



The screenshot shows a web interface for uploading documents. At the top, it says "Post-Closing Compliance Pkg" with "Add New" and "Submit" buttons. Below this is a blue bar labeled "Uploaded Documents (0)". Underneath the bar, a message reads: "No e-Mortgage documents have been uploaded for this package."

# AzIDA HOME+PLUS

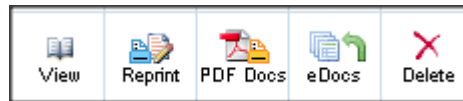
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For the purpose of this training, we will illustrate the upload procedures for a post-closing DPA Compliance package.

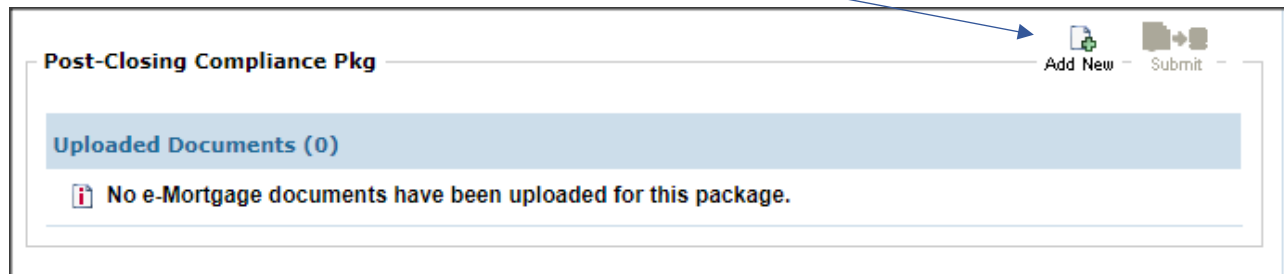
The process to upload the Underwriter's Certification is the same.

There is a separate on-demand, training session related the *underwriter certification process and pre-closing review* that provides greater detail on that process.

- Once all the items on the post-closing checklist have been stacked and saved on your PC, select the “eDocs” icon from the Loan Status tab for the respective transaction.



- Click on the “Add New” icon from the Post-Closing Compliance Pkg Box



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- You can upload each document individually or the full Post-Closing file in one upload.

The screenshot shows a web interface for uploading mortgage documents. On the left, there is a 'Loan Status' section with a dollar sign icon and a question mark. Below it, instructions state that an asterisk denotes a required field and provide steps for adding or modifying documents. A 'Notes' section specifies that document uploads must be in valid formats like .pdf, .doc, .xls, .gif, .jpeg, .png, or .txt, and that login names and passwords are case sensitive. The main area is titled 'eMortgage Document For Loan No.' and includes 'Save' and 'Cancel' buttons. A dropdown menu for '\*Package:' is set to 'Post-Closing Compliance Pkg'. Below this, a 'Click Here' button is provided for document upload. Two options for naming the document are shown: a dropdown for predefined names and a text input for a customized name. At the bottom, there is a large text area for 'Enter additional comments about this document'.

- Select a document name from the predefined list. If needed, you can add notes or comments.

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- Select the “Click Here” button and a Get File box will pop-up.

The screenshot displays the 'eMortgage Document For Loan No.' interface. At the top, there are 'Save' and 'Cancel' buttons. Below, a dropdown menu shows '\*Package: Post-Closing Compliance Pkg'. A text prompt says 'Please **Click Here** to upload a document.' Below this is another dropdown menu for '\*Select a document name from the predefined list'. An 'or' separator is followed by a text input field for '\*Enter a customized document name.'. A large text area is labeled 'Enter additional comments about this document'. A pop-up window titled 'Get File - Google Chrome' is overlaid on the right, showing a 'Choose File' button, 'No file chosen' text, and 'Upload' and 'Cancel' buttons. The footer of the main interface includes 'Powered by **emphasys**' and 'Copyright © 1999 - 2019 Emphasys Software. All rights reserved. | [About Lender Online](#)'.

- Click the “Choose File” box, select Browse, search for the Post-Closing Package document saved on your PC, and then click “Upload”.


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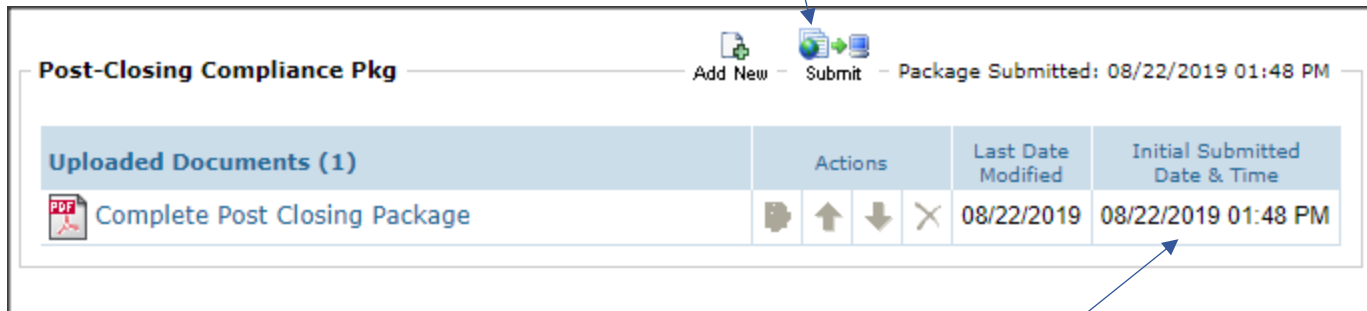
- After the UW Certification has been uploaded select the “save”  icon and you will receive the Update Successful notification pop-up







- ....you're not done yet!

## How to upload documents in the Lender-Online reservation system

- Once the Post-Closing package has been uploaded and saved, you MUST click the “submit”  icon. The system assumes you have more documents to upload until you “tell it” you are done.



Post-Closing Compliance Pkg		Add New	Submit	Package Submitted: 08/22/2019 01:48 PM		
Uploaded Documents (1)		Actions		Last Date Modified	Initial Submitted Date & Time	
	Complete Post Closing Package				08/22/2019	08/22/2019 01:48 PM

- When done correctly, the Initial Submitted Date & Time field will be populated.
  - Within 3 minutes, the loan status will update from Certification to Post Close Pkg.
  - Be sure to check back into the transaction within 48 hours to view any potential conditions or stips.