



Arizona IDA **Home+Plus** / **Arizona Is Home** Lender Training

How To Upload Documents In The Lender-Online Reservation System

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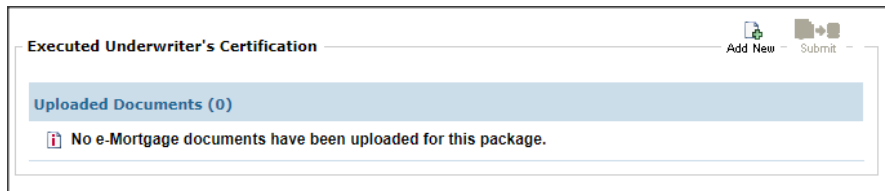
How to upload documents in the Lender-Online reservation system

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.

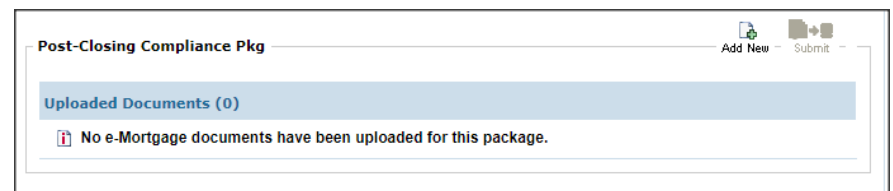
How to upload documents in the Lender-Online reservation system

- 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."

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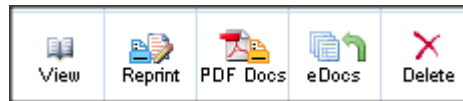
How to upload documents in the Lender-Online reservation system

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

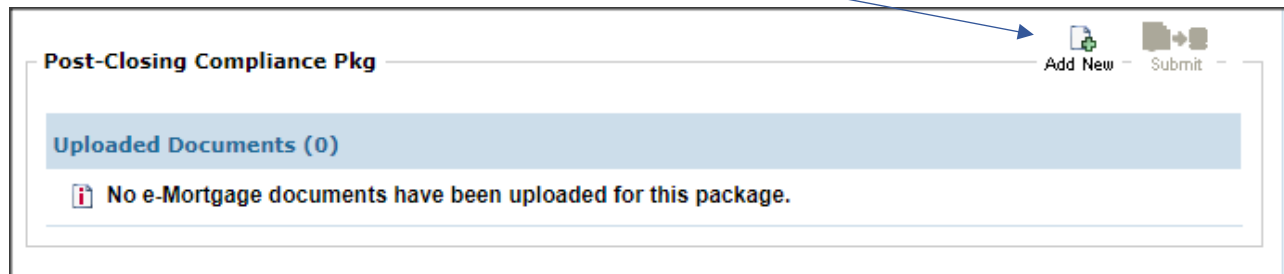
The process to upload the Underwriter's Certification is the same.

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



How to upload documents in the Lender-Online reservation system

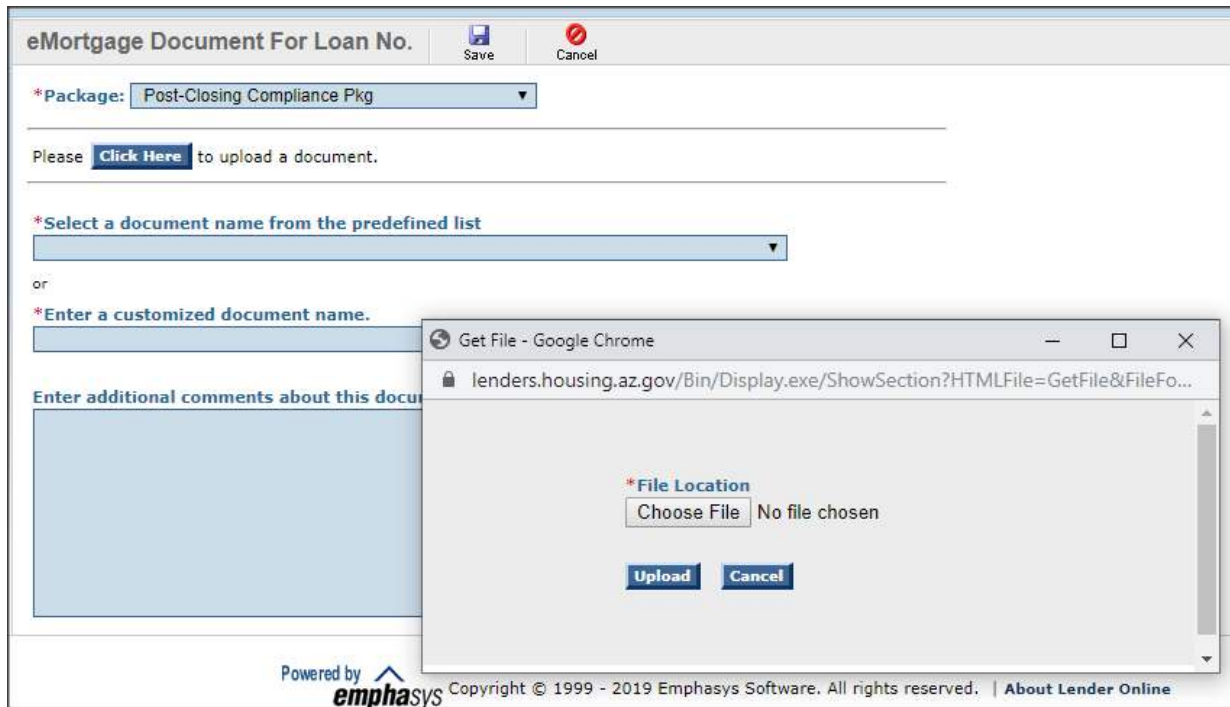
- You can upload each document individually or the full Post-Closing file in one upload.

The screenshot shows a web interface for uploading an eMortgage document. The title bar reads "eMortgage Document For Loan No." and includes "Save" and "Cancel" buttons. The left sidebar contains instructions: "* denotes a required field." and "To add/modify an eMortgage document fill out the required fields and then click on the 'Save' button. If you don't wish to save your changes click on the 'Cancel' button." Below this is a "Notes:" section stating "Please make sure that the document that you upload is a valid document. Ex: .pdf, .doc, .xls, .gif, .jpeg, .png, .txt, etc" and "The 'Login Name' and 'Password' fields are case sensitive." The main form area includes a "*Package:" dropdown menu set to "Post-Closing Compliance Pkg", a "Please [Click Here](#) to upload a document." instruction, a "*Select a document name from the predefined list" dropdown menu, the word "or", a "*Enter a customized document name." text input field, and a large text area labeled "Enter additional comments about this document".

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

How to upload documents in the Lender-Online reservation system

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

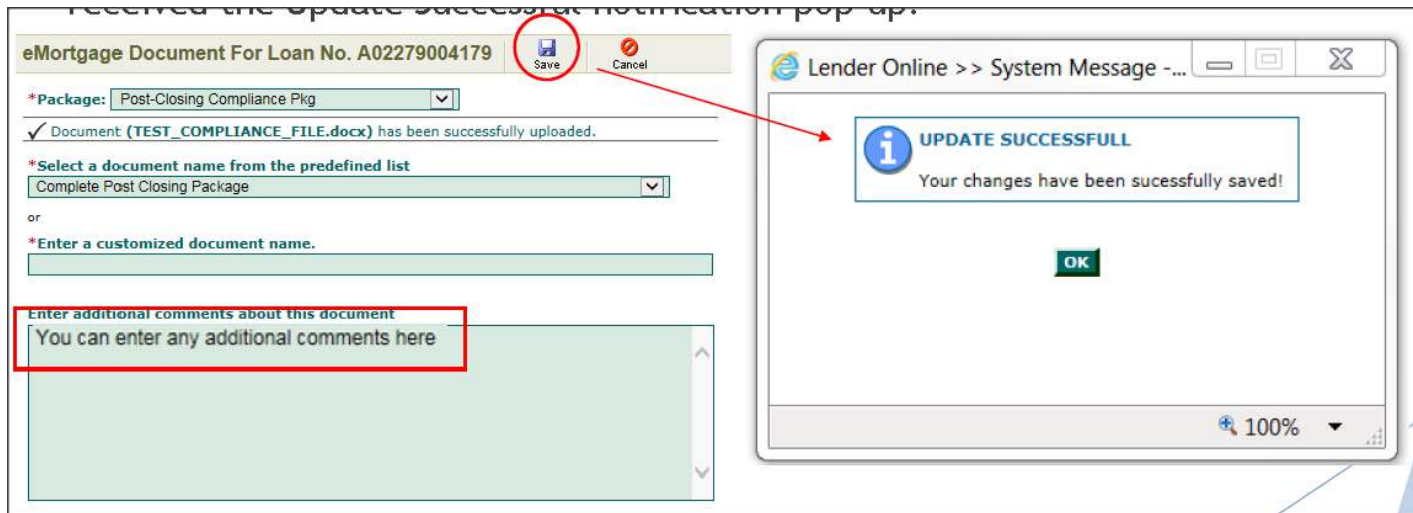


The screenshot displays the 'eMortgage Document For Loan No.' interface. At the top, there are 'Save' and 'Cancel' buttons. Below, a dropdown menu shows '*Package: Post-Closing Compliance Pkg'. A text prompt says 'Please **Click Here** to upload a document.' Below this is another dropdown menu for '*Select 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 side. It contains a '* File Location' section with a 'Choose File' button and the text 'No file chosen'. At the bottom of the pop-up are '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”.


How to upload documents in the Lender-Online reservation system

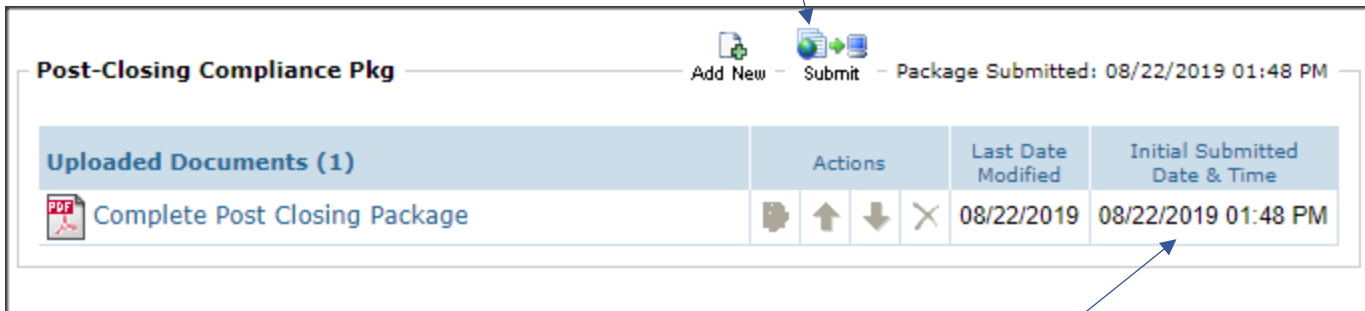
- After the UW Certification has been uploaded select the “save”  icon and you will receive the Update Successful notification pop-up







-you're not done yet!

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- 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.



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.



END