



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

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

Arizona IDA  
Arizona Is Home Lender Training

Questions?

Contact: [Operations@HomePlusAz.com](mailto:Operations@HomePlusAz.com)

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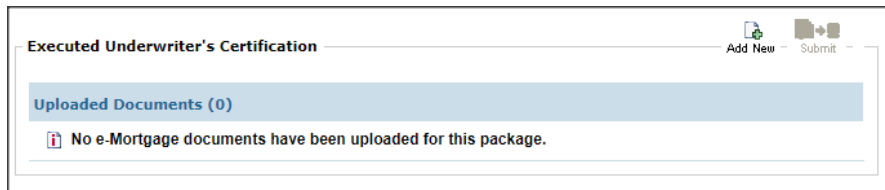
## How to upload documents in the Lender-Online reservation system

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.

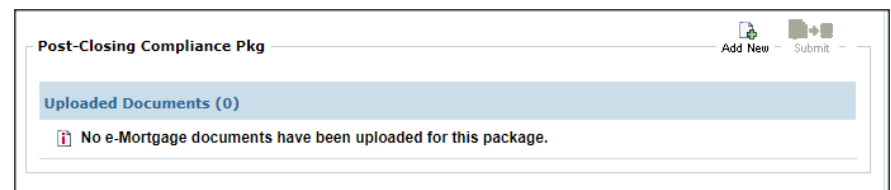
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- The Underwriter's Certification Documents goes here ...



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."

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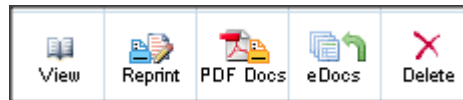
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For the purpose of this training, we will illustrate the upload procedures for a post-closing DPA Compliance package.

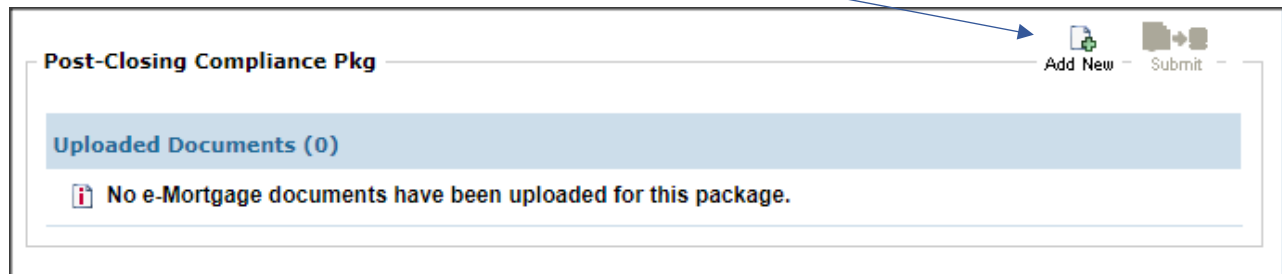
The process to upload the Underwriter's Certification is the same.

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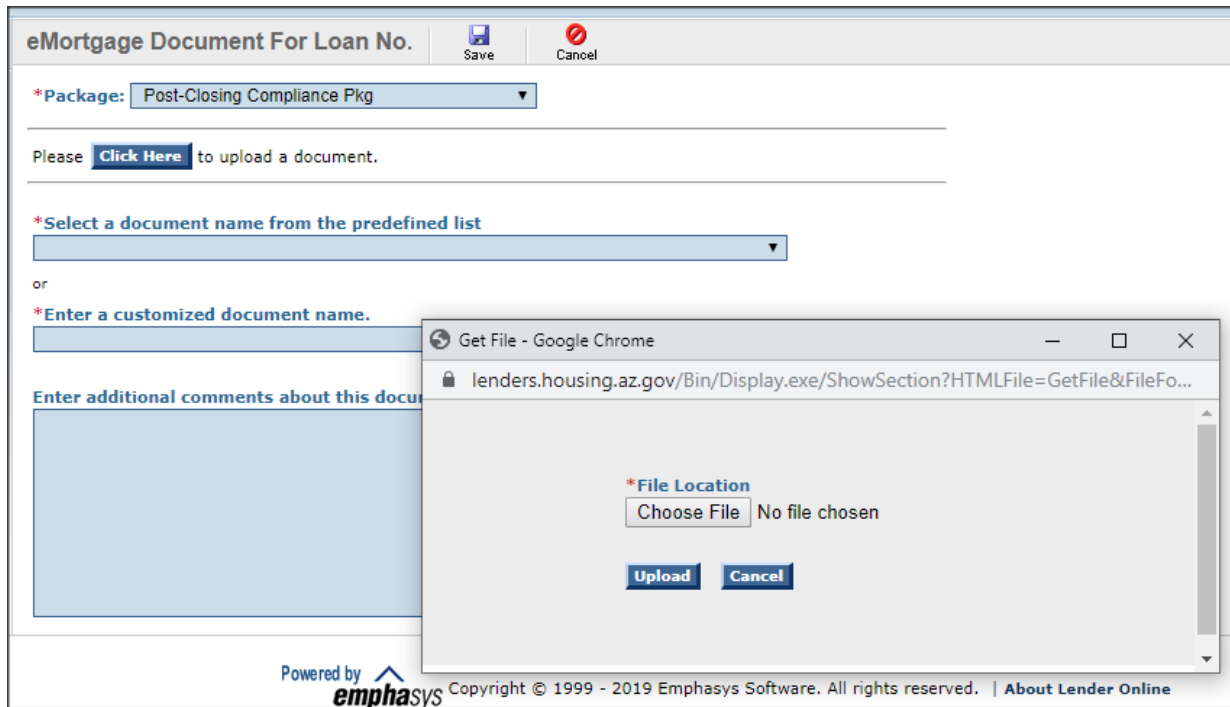
- You can upload each document individually or the full Post-Closing file in one upload.

The screenshot shows a web form titled "eMortgage Document For Loan No." with "Save" and "Cancel" buttons. The form is divided into two main sections. The left section contains instructions and notes: "\* denotes a required field." followed by "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 right section contains a "\*Package:" dropdown menu set to "Post-Closing Compliance Pkg". Below this is a "Please [Click Here](#) to upload a document." instruction. There are two options for naming the document: "\*Select a document name from the predefined list" with a dropdown menu, and "\*Enter a customized document name." with a text input field. At the bottom is 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.

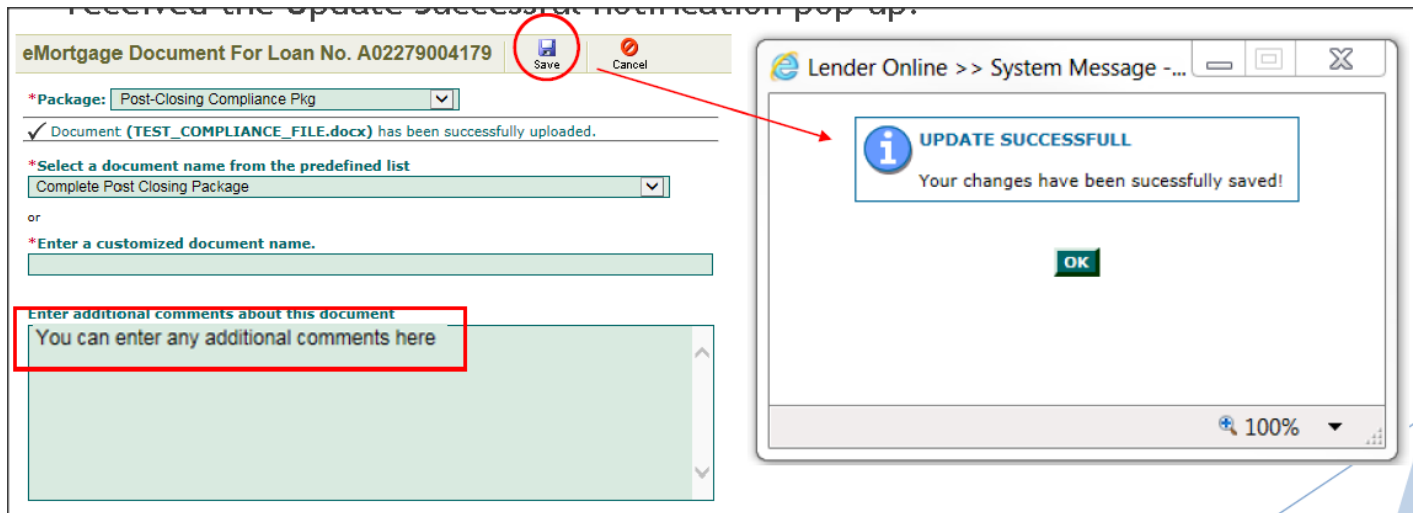


The screenshot shows a web form titled "eMortgage Document For Loan No." with "Save" and "Cancel" buttons. The form includes a dropdown menu for "Package" set to "Post-Closing Compliance Pkg", a "Click Here" button, and a "Select a document name from the predefined list" dropdown. A "Get File" pop-up window is overlaid, showing a "Choose File" button and "Upload" and "Cancel" buttons. The pop-up window title is "Get File - Google Chrome" and the URL is "lenders.housing.az.gov/Bin/Display.exe/ShowSection?HTMLFile=GetFile&FileFo...". The footer of the form reads "Powered by emphasyS 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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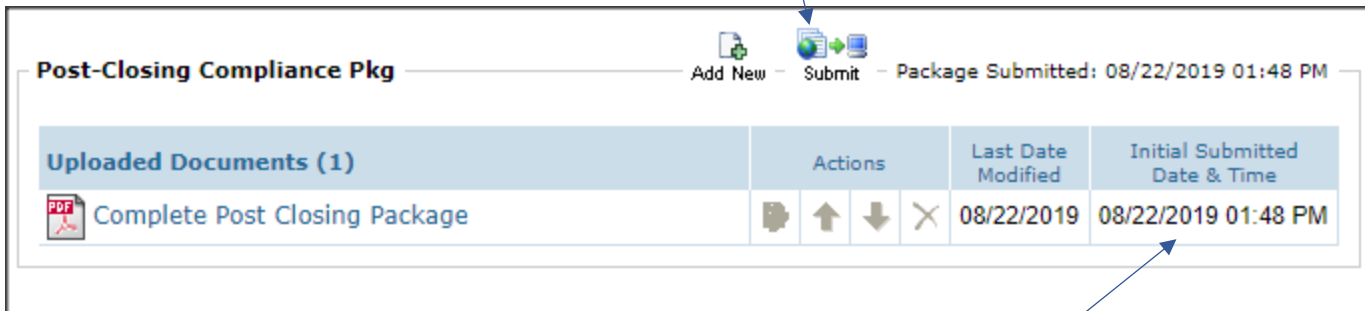
- After the UW Certification has been uploaded select the “save”  icon and you will receive the Update Successful notification pop-up







- ....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.



The screenshot displays the 'Post-Closing Compliance Pkg' interface. At the top, there are 'Add New' and 'Submit' buttons. The 'Submit' button is highlighted with a blue box and an arrow. Below the buttons, a table lists the uploaded documents. The table has four columns: 'Uploaded Documents (1)', 'Actions', 'Last Date Modified', and 'Initial Submitted Date & Time'. The first row shows a PDF document titled 'Complete Post Closing Package' with a timestamp of '08/22/2019 01:48 PM' in the 'Initial Submitted Date & Time' column. An arrow points from the 'Submit' button to the 'Initial Submitted Date & Time' field.

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.





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