



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

V062026a

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) Pre-Closing Review Package – *Arizona is Home*
- (2) Underwriter's Certification – *HOME Plus*
- (3) Post-Closing DPA Compliance Package – *either program*
- (4) Trailing Conditions or Stips – *either program*

How to upload documents in the Lender-Online reservation system

- The Underwriter's Certification (Home Plus) and Pre-Close File (AZ Is Home) Documents go here...
- The Post-Closing Compliance Package (and any conditions or trailing docs) go here

PACKAGES FOR LOAN NO. A05999005836 - TEST, JOHN

UNDERWRITER CERTIFICATION FORM AND PRE-CLOSE FILE (SUBMIT AFTER UPLOADING)

Uploaded Documents (0)

No e-Mortgage documents have been uploaded for this package.

Lender Email Contacts for Loan Status...

Post-Closing Compliance Pkg

Uploaded Documents (0)

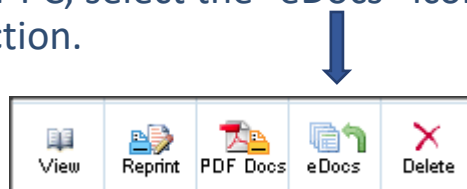
No e-Mortgage documents have been uploaded for this package.

AzIDA HOME+PLUS

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.

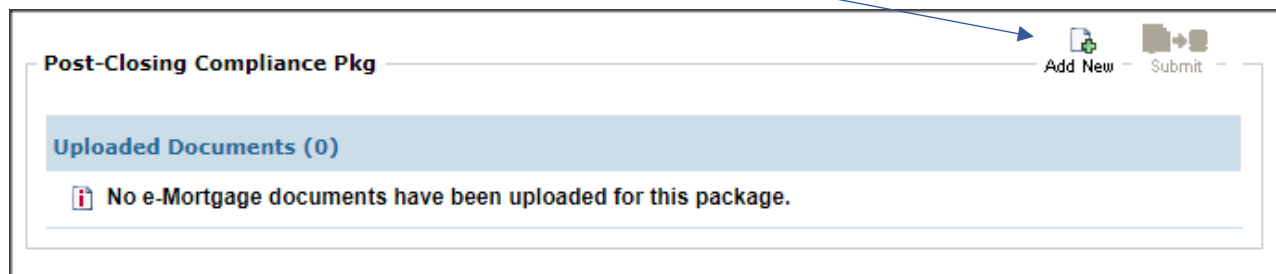
- Once all the items on the post-closing checklist have been stacked and saved on your PC, select the “eDocs” icon from the Loan Status tab for the respective transaction.



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

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

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



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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 eMortgage 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 a document. 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 form 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 '*Select a document name from the predefined list' and a text input for '*Enter a customized document name.'. A large text area at the bottom is 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

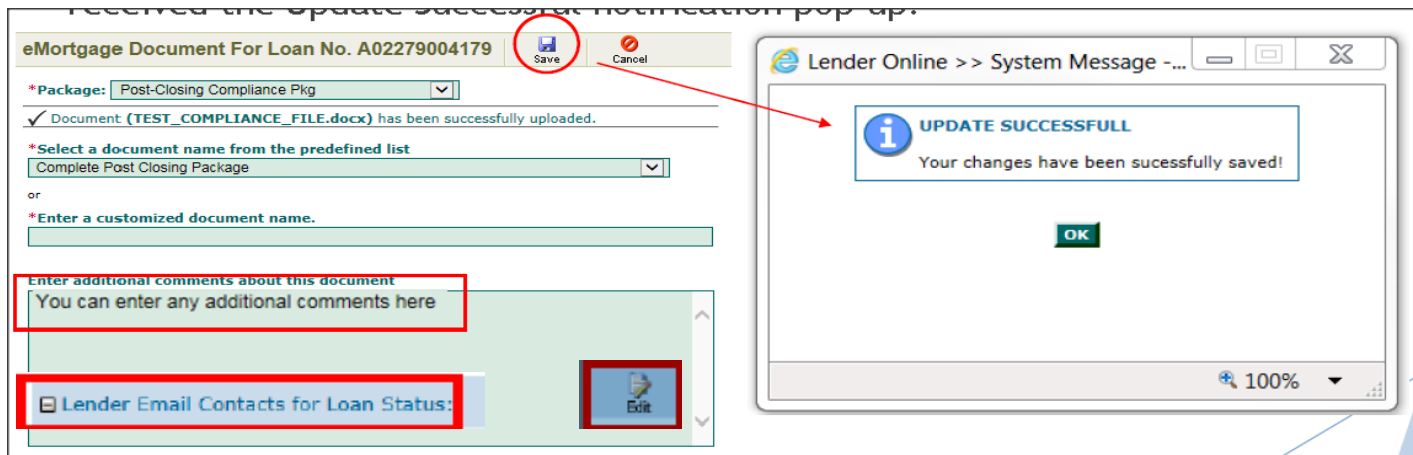
- Select the “Click Here” button and a Get File box will pop-up.

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, there are two options for document naming: '*Select a document name from the predefined list' (with a dropdown) and '*Enter a customized document name.' (with a text input). A large text area is labeled 'Enter additional comments about this document'. A 'Get File - Google Chrome' pop-up window is overlaid on the right, showing the URL 'lenders.housing.az.gov/Bin/Display.exe/ShowSection?HTMLFile=GetFile&FileFo...'. Inside the pop-up, there is 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

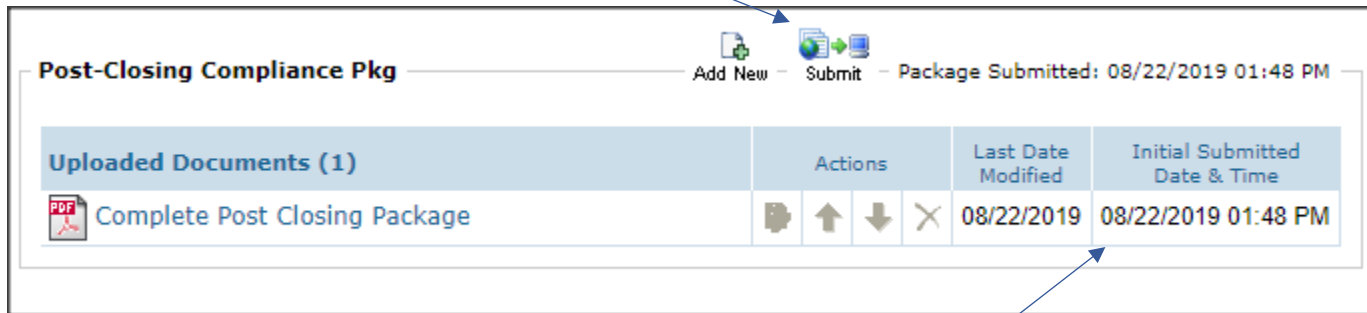
- After the Post-Closing Pkg has been uploaded, locate the Loan Status Notification Settings. Select the appropriate contact(s) who should receive automatic loan status notifications.
- Select the “save”  icon and you will receive the Update Successful notification pop-up.








-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.



The screenshot shows the 'Post-Closing Compliance Pkg' interface. At the top, there are 'Add New' and 'Submit' buttons. Below them is a table with the following data:

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 Closing Package.
 - An automatic email notification will be sent to all selected email contacts with the updated status, link to access the loan, instructions for next steps.



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