

CalHFA MAS User Guide: Uploading compliance documents

Where do I upload my Loan Package?

TIP Upload works best with Google Chrome.

1. Find your reservation by searching “**Loan Number,**” “**Last Name**” or “**Address.**”

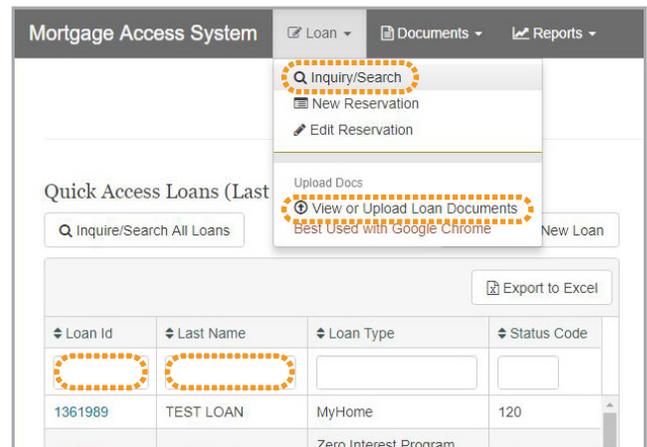
Three ways to search:

- › Quick Access Loans Table
- › Loan tab and clicking on Inquiry/Search
- › Loan tab and clicking on View or Upload Documents

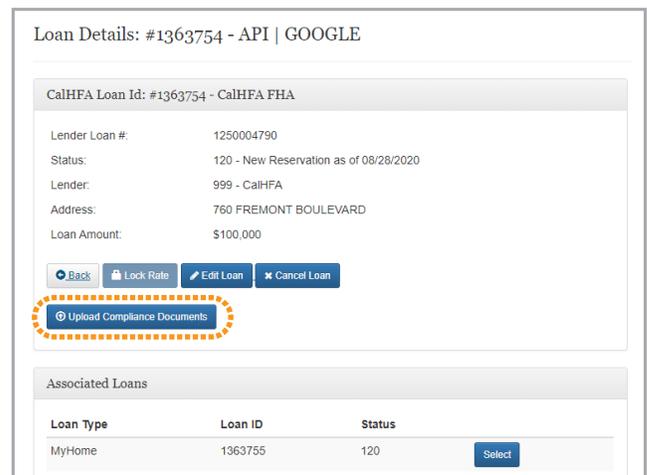
2. Click on “**Upload Compliance Documents.**”

TIP If you enter the first loan ID, you will see the option to upload compliance documents. If you enter the subordinate loan ID and your loan is approved you will see the option to upload purchase documents. You can select the associated loan from the **Associated Loans** table to view loan details and available options.

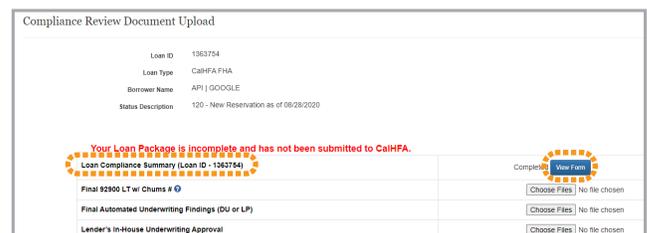
3. Continue with Compliance Review Document Upload. Complete the Loan Compliance Summary by Selecting “**View Form.**”



Main MAS menu



Upload Compliance Documents



Upload Compliance Documents

4. Complete all fields on Loan Compliance Summary (LCS) and don't forget to **Save**.

TIP Information entered must be supported by documentation uploaded.

5. Continue with document upload by clicking **“Choose Files.”**

Once documents are selected you are ready to upload. Click on **“Upload Documents”** at the bottom of the page.

6. If your documents have uploaded you will see them listed on the confirmation page.

TIP You must complete the loan compliance summary and upload all required documentation before you can submit file for review.

7. If your file is incomplete you will need to return to the document upload screen to upload all required documents.

Fill out Loan Compliance Summary and don't forget to save

Document Name	Upload Status
Final 92900 LT w/ Churns #	No file chosen
Final Automated Underwriting Findings (DU or LP)	No file chosen
Lender's In-House Underwriting Approval	No file chosen
Final or Initial signed 1003	No file chosen
Credit Report	No file chosen
Executed Purchase Agreement or Escrow Instructions	No file chosen
Appraisal (URAR)	No file chosen
"Life of Loan" Standard Flood Hazard Certificate	No file chosen
Preliminary Title Report - with plot map and address supplement	No file chosen
CalHFA Borrower's Affidavit (02/01/2019)	No file chosen
Homebuyer Education Counseling Certificate	No file chosen

Choose files to upload and click “Upload Documents”

The following document(s) have been successfully uploaded:

Document Name	Document Type	Upload Date	Upload by
9-28-20.pdf	Final 92900 LT w/ Churns #	9/28/2020 10:25:46 AM	lwalker@calhfa.ca.gov
9-28-20.pdf	Final Automated Underwriting Findings (DU or LP)	9/28/2020 10:25:46 AM	lwalker@calhfa.ca.gov

Confirmation page

8. Once you have uploaded all required loan documents, click on the option to **“Submit Initial Package to CalHFA.”**

When you see the confirmation message **“Loan Review Request -Success,”** click OK. Your loan will now be advanced to status **“410”**

TIP Do not submit your loan file unless you have provided all documentation. Your file will be suspended or rejected if it is incomplete.

Your Loan Package is incomplete and has not been submitted to CalHFA.

Loan Compliance Summary (Loan ID - 1363754) Completed [View Form](#)

Document Name	Document Type	Upload Date	Action
Final 92900 LT w/ Churns #	Final 92900 LT w/ Churns #	9/28/2020 10:28:05 AM	Choose Files No file chosen
Final Automated Underwriting Findings (DU or LP)	Final Automated Underwriting Findings (DU or LP)	9/28/2020 10:28:05 AM	Choose Files No file chosen
Lender's In-House Underwriting Approval	Lender's In-House Underwriting Approval	9/28/2020 10:28:05 AM	Choose Files No file chosen
Final or Initial signed 1003	Final or Initial signed 1003		Choose Files No file chosen
Credit Report	Credit Report		Choose Files No file chosen
Executed Purchase Agreement or Escrow Instructions	Executed Purchase Agreement or Escrow Instructions		Choose Files No file chosen
Appraisal (URAR)	Appraisal (URAR)		Choose Files No file chosen
"Life of Loan" Standard Flood Hazard Certificate	"Life of Loan" Standard Flood Hazard Certificate		Choose Files No file chosen
Preliminary Title Report - with plat map and address supplement	Preliminary Title Report - with plat map and address supplement		Choose Files No file chosen
CalHFA Borrower's Affidavit (02/01/2019)	CalHFA Borrower's Affidavit (02/01/2019)		Choose Files No file chosen
Homebuyer Education Counseling Certificate	Homebuyer Education Counseling Certificate		Choose Files No file chosen

Complete uploading documents to submit Loan Package

Please select Submit to initiate Compliance Review [Submit Initial Package to CalHFA](#)

Loan ID: 1363754
 Loan Type: CalHFA FHA
 Borrower Name: API | GOOGLE
 Status Description: 120 - New Reservation as of 08/28/2020

The following document(s) have been successfully uploaded:

Document Name	Document Type	Upload Date
9-28-20.pdf	Final 92900 LT w/ Churns #	9/28/2020 10:47:50 AM
9-28-20.pdf	Final Automated Underwriting Findings (DU or LP)	9/28/2020 10:47:50 AM
9-28-20.pdf	Lender's In-House Underwriting Approval	9/28/2020 10:47:50 AM

Submit to CalHFA

Loan Review Request - Success

Your loan has been successfully submitted.

[OK](#)

Submission confirmation

Compliance Review Document Upload

Loan ID: 1363754
 Loan Type: CalHFA FHA
 Borrower Name: API | GOOGLE
 Status Description: 410 - File received for Compliance review as of 09/28/2020

410 Status

File Review Status		
Updated 9/28/2020		
	Loans in line	Review Date
Compliance	50	Sept 25
In Suspense	2	Sept 25
Post-closing		
	Loans in line	Review Date
MyHome/ ZIP/School	32	Sept 25
In Suspense	30	Sept 25

Loans are reviewed in the order they are received. To see current review date and count of files in review please refer to the Lenders/Realtors section on our website:

www.calhfa.ca.gov/homeownership