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."





CalHFA Loan Id: #13	63754 - CalHFA FHA		
Lender Loan #:	1250004790		
Status:	120 - New Reservat	ion as of 08/28/2020	
Lender:	999 - CalHFA		
Address:	760 FREMONT BO	JLEVARD	
Loan Amount:	\$100,000		
Back Lock Rate Order	Edit Loan X Cancel L	oan	
associated Loans			
Associated Loans Loan Type	Loan ID	Status	

Upload Compliance Documents

Compliance Review Document U	Jpload	
Loan ID	1363754	
Loan Type	CalHFA FHA	
Borrower Name	API GOOGLE	
Status Description	120 - New Reservation as of 08/28/2020	
Your Loan Package is	s incomplete and has not been submitted to CalHFA.	Complete Wew Form
Final 92900 LT w/ Chums # 😡		Choose Files No file chosen
Final Automated Underwriting	Findings (DU or LP)	Choose Files No file chosen
Lender's In-House Underwriti	ng Approval	Choose Files No file chosen

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.

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

Loan Process	sor				
FirstL	ast Name	JERRY BROWN			
	Phone	800-669-1079			
	Phone Ext				
	Email	jbgov@ca.gov			
Underwriter					
FirstU	ast Name	JERRY BROWN			
	Phone	800-669-1079			
	Phone Ext				
	Email	jbgov@ca.gov			
Loan	Email	jbgov@ca.gov			
Loan Will MCC tax credit be issued?	Email	jbgov@ca.gov			
Loan Will MCC tax credit be issued? AUS Case Number	Email No 5968135	pgov@ca.gov	InsureriFHA Case No	109865138651	
Loan Will MCC tax credit be issued? AUS Case Number Day One Containty DU Wildation Service	Email No 5968135 Yes •	bgov@ca.gov	InsurerFHA Case No Final AUS Date	109865138651 06/20/2018	
Loan Will MCC tax credit be issued? AUS Care Number Day One Carsinity DU Waldation Service	Email No 5968135 Yes v	ibgov@ca.gov	Insurer/FAA.Case No Finist AUS Date	109865138651 06/20/2018	
Loan WEIKCC tax credit be issued? AUS Case Number Day One containing DD Validations Service Property # of litedrooms	Email No 5968135 Yes ¥	ibgov(g)ca.gov	Insurer/FMA.Case No Final AUS Date	109865138651 06202016 123-5648615	
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Loan WII MCC to credit to issued? AUS Case Number Dry One Censity DU Violation Service Property # of Stationom # of Stationom Secure 7 et al.	Email No 5968135 Yes * 2 2,00 2000	• • • • • • • • • • • • • • • • • • •	InsurerFHA Case No Final AUS Date APN LOT Tract	109865138651 06/20/2018 123-5648615 18 6655	

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

.oan Compliance summary (Loan ID - 1363/54)	Incomplete View Form
Final 92900 LT w/ Chums # \varTheta	Choose Files Ne file chosen
Final Automated Underwriting Findings (DU or LP)	Choose Files No file chosen
ender's In-House Underwriting Approval	Choose Files No file chosen
Final or Initial signed 1003 😡	Choose Files No file chosen
Credit Report 😯	Choose Files No file chosen
Executed Purchase Agreement or Escrow Instructions	Choose Files No file chosen
Appraisal (URAR)	Choose Files No file chosen
Life of Loan" Standard Flood Hazard Certificate	Choose Files No file chosen
Preliminary Title Report – with plat map and address supplement	Choose Files No file chosen
CalHFA Borrower's Affidavit (02/01/2019) 🕤	Choose Files No file chosen
Iomebuyer Education Counseling Certificate 😌	Choose Files No file chosen

Choose files to upload and click "Upload Documents"

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 successfu ocument Name	ully uploaded.	Upload Date	Upload by
The following document(s) have been successfu counter Name -28-20 pdf	uly uploaded. Document Type Final 92000 LT wi Churns #	Upload Date 9/28/2020 10:25:46 AM	Upload by Iwalker@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.

Loan	Compliance Summary (Loan ID - 1363754)	Com	pleted View Form
Final	92900 LT w/ Chums # 😜		Choose Files No file ch
۲	9-28-20.0df	twalker@calhfa.ca.gov	9/28/2020 10:26:05
Final	Automated Underwriting Findings (DU or LP)		Choose Files No file ch
۲	9-28-20.00	hvalker@calhfa.ca.gov	9/28/2020 10:26:05
Lend	er's In-House Underwriting Approval		Choose Files No file ch
Final	or Initial signed 1003 😌		Choose Files No file ch
Cred	it Report 💿		Choose Files No file ch
Exec	uted Purchase Agreement or Escrow Instructions		Choose Files No file ch
Appr	alsal (URAR)		Choose Files No file ch
"Life	of Loan" Standard Flood Hazard Certificate		Choose Files No file ch
Preli	minary Title Report – with plat map and address supplement		Choose Files No file ch
CalH	FA Borrower's Affidavit (02/01/2019) 🥹		Choose Files No file ch
Hom	ebuver Education Counseling Certificate 9		Choose Files No file ch

Complete uploading documents to submit Loan Package

Please select Submit to initiate Compliance Re	eview	Submit Initial Package to Call/FA	
Loan ID	136375	4	
Loan Type	CalHFA	FHA	
Borrower Name	API G	DOGLE	
Status Description	120 - N	ew Reservation as of 08/28/2020	
The following document(s) have been successful	y upload	ed.	
ocument Name		Document Type	Upload Date
-28-20.pdf		Final 92900 LT w/ Chums #	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
∂-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.	
	ок

Submission confirmation



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



GOT QUESTIONS?

Visit: www.calhfa.ca.gov or call: 877.9.CalHFA (877.922.5432)