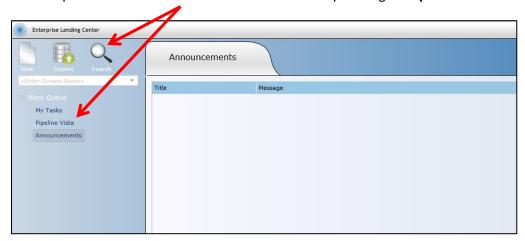# Uploading Documents System Guide
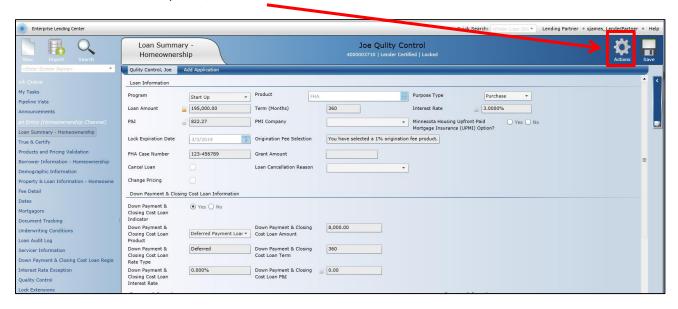
April 22, 2019

Loan Commitment System
Uploading Documents

1.   Find and open a loan with either the **Search** button or by clicking on **Pipeline Vista**.
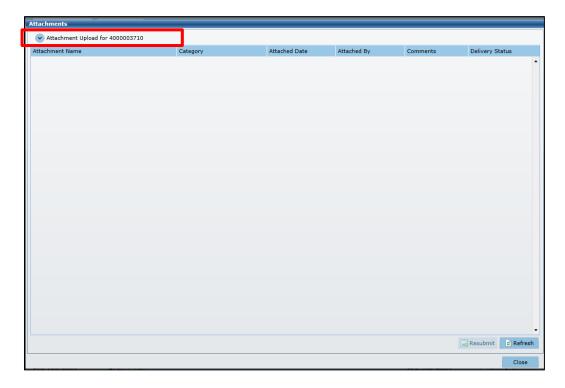

2.   Once the loan is opened, click on the **Actions** button.
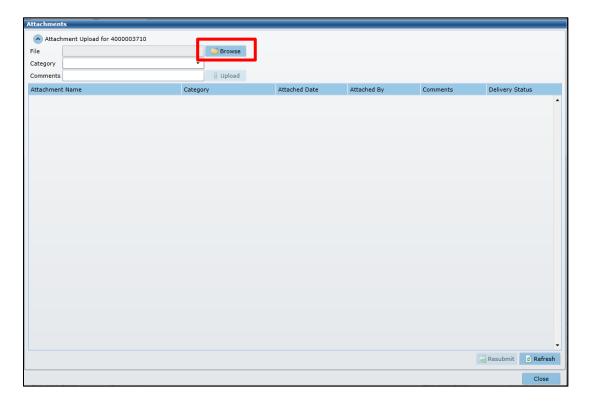
3.   The following dropdown will appear. Click on **Attachments**.
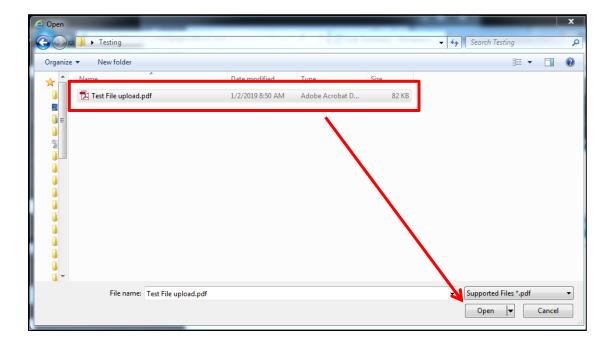

4.   The Attachments screen will open. Click on the dropdown next to **Attachment Upload**.
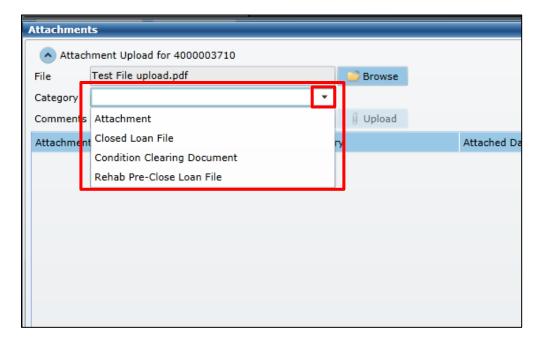
5.   Click on the **Browse** button to select a file.
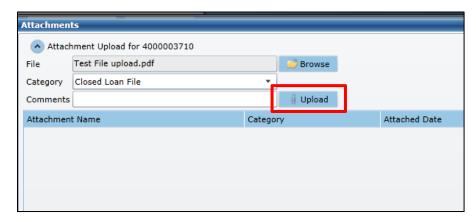   - Please note the file must be in PDF format for upload.

6. Once file has been selected, click on the **Category** dropdown to select the appropriate file upload category.
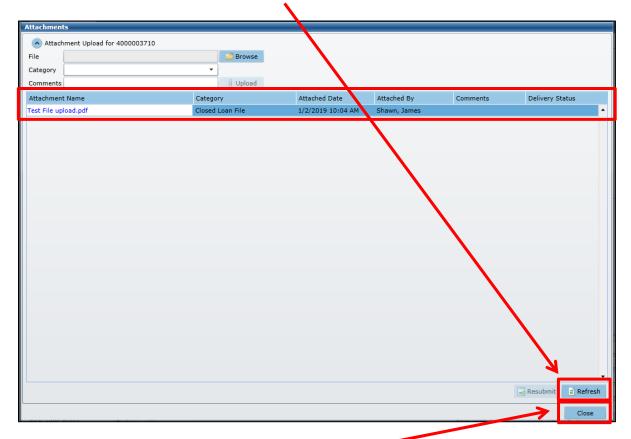

Select one of the four **Category** options:

- Attachment – Documents for Minnesota Housing to review prior to closing (i.e. income, tax returns, etc.).
- Closed Loan File – Full file upload once the loan has closed.
- Condition Clearing Document – Documents requested by Minnesota Housing Quality Control team if the loan is selected for audit.
- Rehab Pre-Close Loan File – Full file upload for Minnesota Housing Quality Control team to review. This is done prior to closing. (Only required for Rehab loans).

7. Click on the **Upload** button.
    - Adding a note in the Comments box is not required, but may be used if needed for additional document description.

8.   The uploaded file will appear in **Attachments** screen. If uploaded documents do not appear, click on the **Refresh** button at the bottom of the screen.

9.   Click on the **Close** button once the file appears to upload.