

The e-Doc Manger

The e-Doc Manager

The **e-Doc Manager** is the digital document folder for a loan file. All of a loan's files and documents are digitally stored in the **e-Doc Manager**.

To access a loan's **e-Doc Manager**, choose **Loan Snapshot** from the loan's action menu. The **e-Doc Manager** is located in the lower, right-hand corner of the **Loan Snapshot** screen.

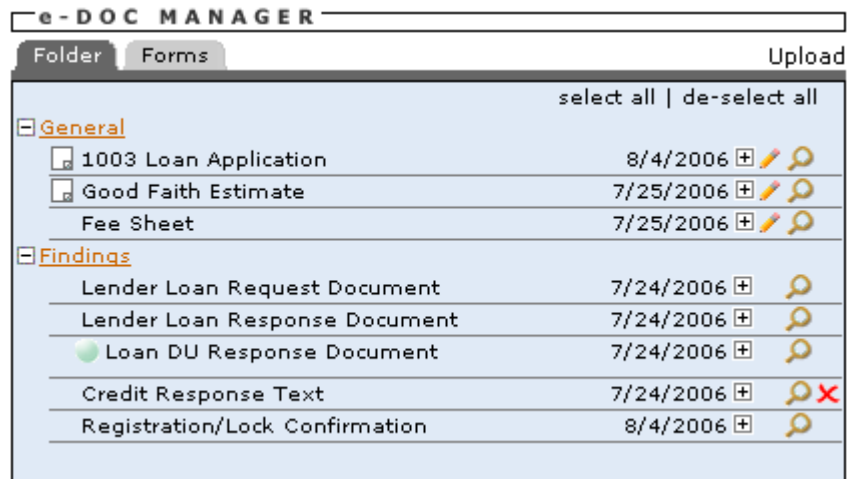







Figure 1 – The e-Doc Manager

Date and Time Stamps

You will see either a date or a time on the right side of the **e-Doc Manager** for each document. If the document was created or last updated today, you will see a time stamp. If it was created or last updated on a previous day, you will see the date. All date and time stamps are in Eastern Time.

Accessing Documents

The **e-Doc Manager** is organized in a tree structure. Click the plus  icon to expand, and click the minus  icon to shrink. Once you have expanded a section of the **e-Doc Manager** tree, you will see the documents available. Click the magnifying glass  icon to view a document. If a document does not have a magnifying glass  icon next to it, then you must click the pencil  icon to enter the document's edit mode since calculations are required.


Editing Documents


To edit a document, click the pencil  icon. Not all documents are editable.


When editing you can do the following:

- Assign individual documents to individual borrowers.
- Populate loan information based on calculations. For instance, you can set a loan origination fee of 1% while editing the GFE.

Printing and Emailing Documents

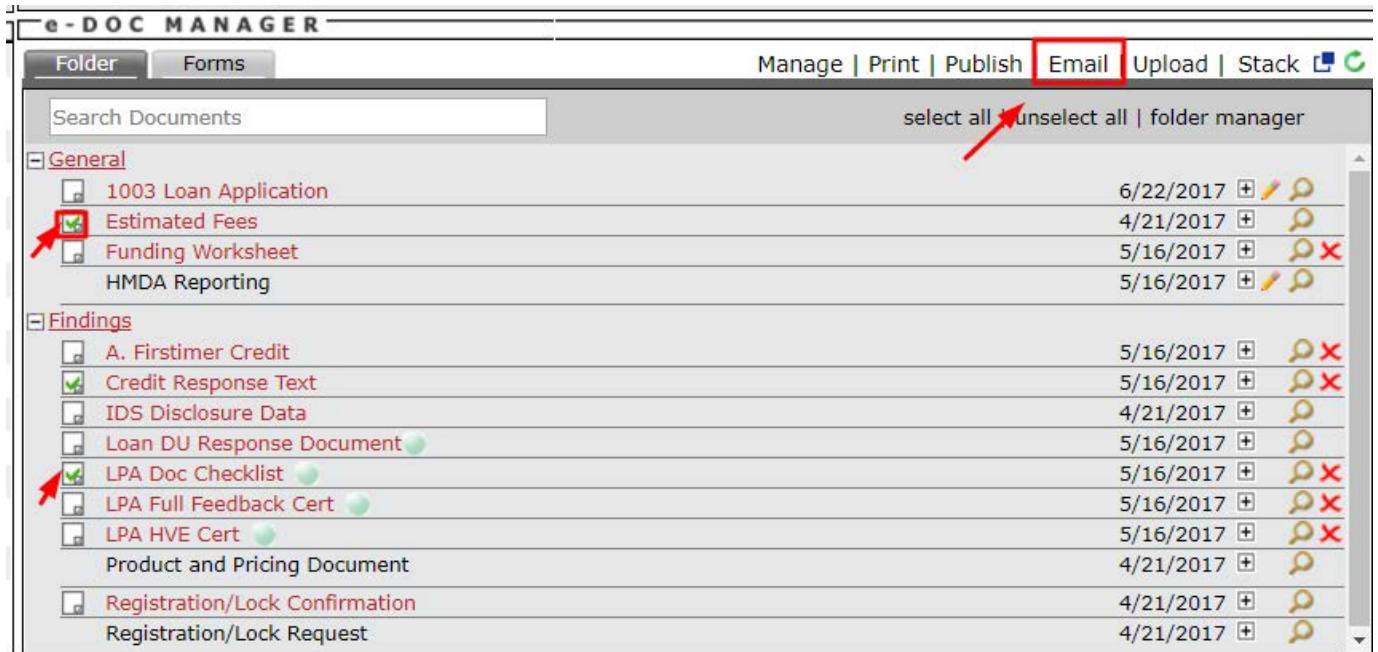
There are two ways to print a document from the **e-Doc Manager**. You can either view the document individually and print it from the view or edit screen, or you can use the print document icon  to flag and print multiple documents.

Documents that do not have the print document icon  to the left of their name must be viewed and printed individually. Most of these documents have a print button when in view mode.

To flag and print multiple documents, click on the print document icon  so that it changes to a flagged print document icon. The **Print** link will appear in the top, right corner of the **e-Doc Manager**. Click **Print** to generate the flagged document(s) in PDF file format for printing. The **Print** link will not appear until you flag at least one document for printing.

You can also email documents by flagging them and clicking on the **Email** link.

Note: Emailed documents are encrypted and password protected. You can change the password before you send the email, if you like. The **default password** used is the primary borrower's social security number.



Document History

Every time a document is saved, a new version is stored in the loan's **e-Doc Manager** along with the name of the person who saved it. To access a file's document history, click the plus sign **+** icon next to the date stamp on the right side of the **e-Doc Manager**.

1003 Loan Application				
Date Modified:	Created By:	Note:		Compare:
6/22/2017 1:50:01 PM ET	Bean Originator			<input type="checkbox"/>
6/22/2017 1:29:21 PM ET	Bean Originator		<input type="button" value="View"/> <input type="button" value="Use"/>	<input checked="" type="checkbox"/>
6/22/2017 11:31:41 AM ET	Bean Originator		<input type="button" value="View"/> <input type="button" value="Use"/>	<input type="checkbox"/>
6/22/2017 11:30:02 AM ET	Bean Originator		<input type="button" value="View"/> <input type="button" value="Use"/>	<input checked="" type="checkbox"/>
6/22/2017 11:24:49 AM ET	Bean Originator		<input type="button" value="View"/> <input type="button" value="Use"/>	<input type="checkbox"/>
5/16/2017 3:27:11 PM ET	Bean Originator		<input type="button" value="View"/> <input type="button" value="Use"/>	<input type="checkbox"/>
5/16/2017 3:27:11 PM ET	Bean Originator		<input type="button" value="View"/> <input type="button" value="Use"/>	<input type="checkbox"/>

Figure 3 - Document History for the 1003

Some documents, such as the 1003, allow you to view previous versions. Click the **View This Version** button. To revert to a previous version of the document, click the **User This Version** button.

Reverting to a previous version of a document makes updates the loan data to reflect that version.

You can compare the differences between two versions of a file by checking those versions and then clicking on **Compare Versions**. The Difference Report generated by this action may also be printed.

Forms – Origination Plus Customers Only

Forms include government forms, disclosures, state-specific forms, verifications, and other. When you add a form to a loan file, information from the loan auto-populates onto the form saving you time and reducing the risk of data entry errors.

- ❓ In the **e-Doc Manager** section of the **Loan Snapshot** screen, click the **Forms** tab.

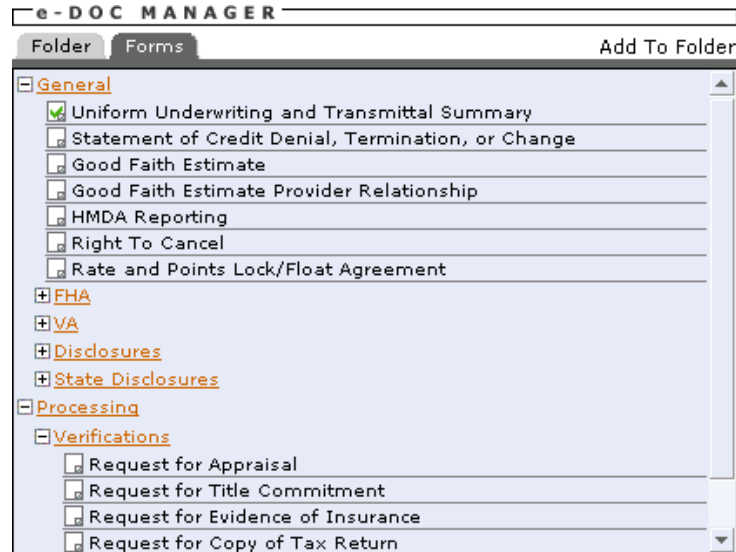


Figure 4 - Origination Plus Forms

- ❓ Expand the forms options by clicking the plus **+** icon where applicable.
- ❓ Click one or more documents so that the document **☑** icon is checked.
- ❓ Once you have selected all of the documents that you wish to add, click the **Add To Folder** link that appears in the top right corner of the **e-Doc Manager**. The screen will reload and you will be taken to the **Folder** tab of the **e-Doc Manager** where the document(s) you selected will appear. Each form will be in its appropriate folder. For instance, if you add a state disclosure, the file will appear in the **State Disclosure** folder (which can be found under the **General** tab).
- ❓ For data to auto-populate into a form, you must click the pencil **✎** icon.
 - Forms get their initial data from the 1003, TIL, and GFE – However, data entry and changes to these forms DO NOT change or update data on the 1003, TIL, and GFE.

Uploading Documents

- ❓ Click the **Upload** link located in the top right corner of the **e-Doc Manager**.



Figure 5 - Upload Feature in the e-Doc Manager

- In the **Upload Document** window that pops up, click the Browse button to locate the file you wish to upload. The supported file types are listed at the bottom of the window. Once you have located the file you wish to upload, double click it to push the file's path into the textbox.

NOTE: Below are the suggested optimal DPI settings when scanning a document for upload:

When scanning to PDF: Scan your image at 72-150 DPI screen resolution. When scanning to JPG: Scan your image at 150 DPI.

You may ZIP a Word or JPG file but not a PDF.

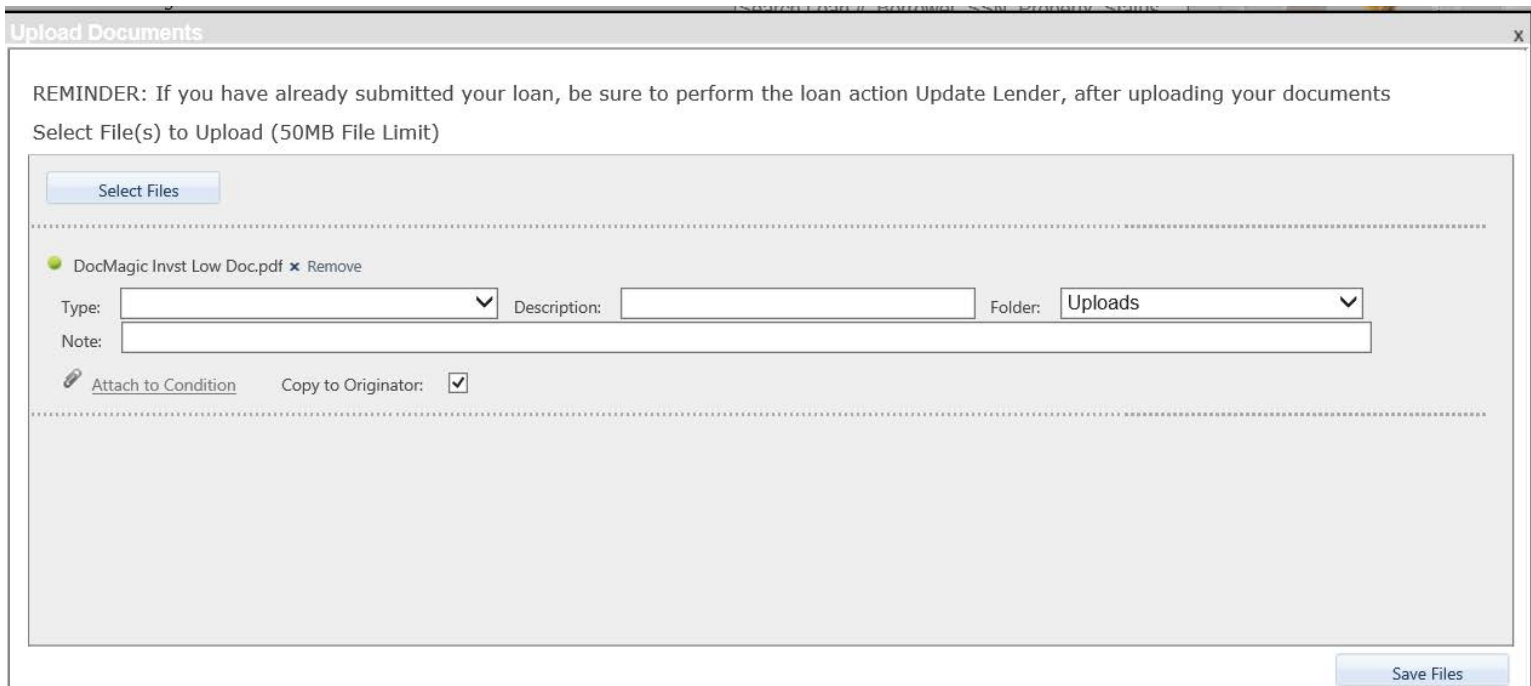


Figure 6 Upload Tool

- Enter a name in the Enter the name... text box. The name that you provide will be used in the **e-Doc Manager** to identify the file.
- Click the **Upload** button. Note that it may take several minutes for the file to upload if it is a large file. Once the file has uploaded, you will be taken to the loan's **e-Doc Manager** where the file will appear under the **Uploads** section.

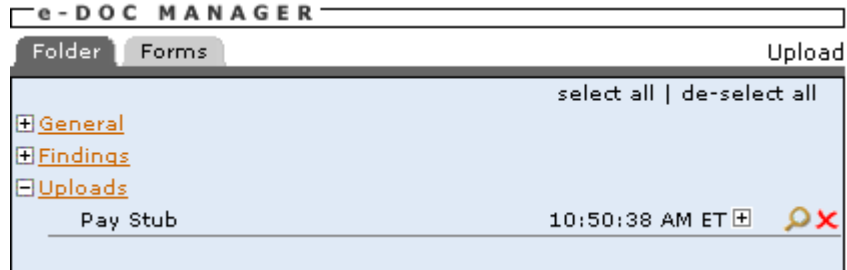


Figure 7 - An Uploaded Pay Stub

NOTE: Uploading a document places it in *your e-Doc Manager*. If you are a broker-side user and want the document to be available to the lender, you must send it using **Submit Loan to Lender** (if you have not submitted the file yet).

*or using **Update Lender** (if you have already submitted the file).

If you are a lender-side user and want the file to be available to the originator you must check the box, **Copy File to Originator** (on the Upload Document screen popup screen).
