

Access PORTAL's "Upload" Tool

Users can utilize the tools at the bottom of the application process screen to upload documents to PORTAL. To do so, click on the circled  icon labeled "Uploads" on the bottom left hand corner of the screen.

Note:

Users may upload any document required for HECM origination at any time during the application process. The document(s) must be in .pdf, .jpg, .png, or xml format.

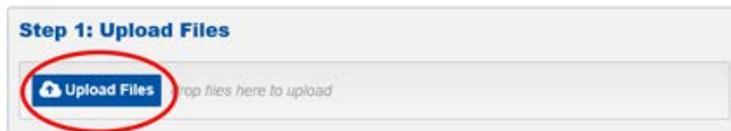
The maximum size for uploads is **70MB** per file and **100MB total** for all files.

- Upload initial submission
- Upload underwriting conditions



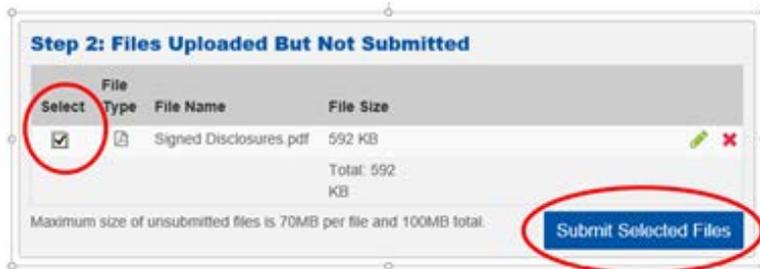
Step 1: Upload Files

Click the "Upload Files" button and navigate to the location where you have stored the files (on your computer). Then select the files that you want to upload.



Step 2: Submit Uploaded Files

Once all submission or condition documents are uploaded, select the items that you want to submit by clicking the checkbox in front of those items. Then click the "Submit Selected Files" button.



Step 3: Verify Submitted Files

Make sure the File Status shows "Submitted" after you have submitted the selected files. To ensure that the documents have been received, confirm that the documents show a "Receive Date" – this should not be done immediately.



File Type	File Name	Submission Type	File Status	Submitted Date	Submitted By	Received Date
	Signed Disclosures.pdf	New Submission	Submitted	Dec-12-2018 09:34 AM PST	Noyes, Tommy	