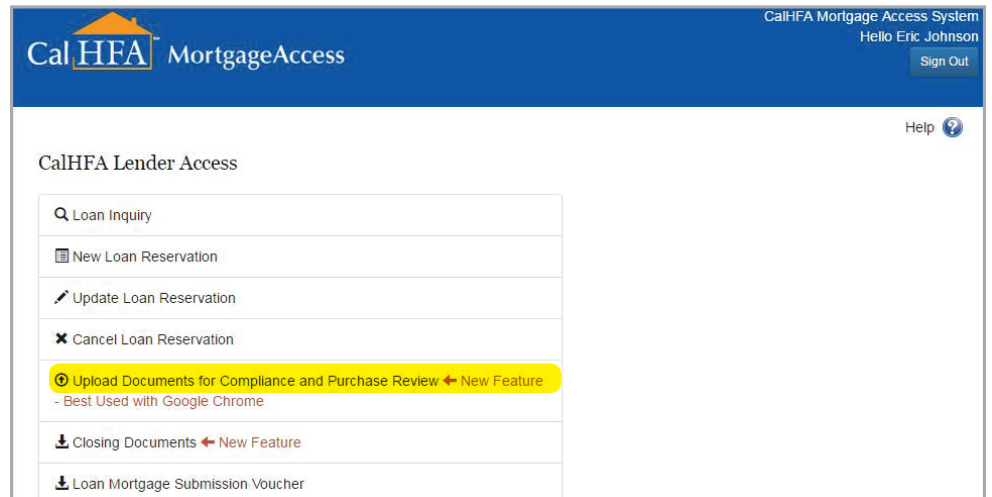


CalHFA MAS User Guide: Purchase Review document upload

Where do I upload my Purchase Package?

1. Once you have logged into MAS, select **“Upload Documents for Compliance and Purchase Review”** from the main MAS menu.
2. Find your reservation by searching **“loan number,” “last name”** or **“address.”**
3. Click **“Select”** next to your reservation to begin uploading documents.

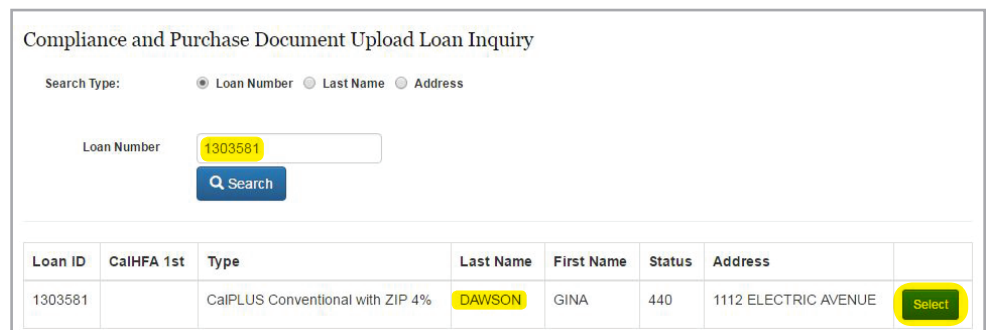


CalHFA Mortgage Access System
Hello Eric Johnson
Sign Out

CalHFA Lender Access

- Loan Inquiry
- New Loan Reservation
- Update Loan Reservation
- Cancel Loan Reservation
- Upload Documents for Compliance and Purchase Review ← New Feature**
- Best Used with Google Chrome
- Closing Documents ← New Feature
- Loan Mortgage Submission Voucher

Main MAS menu, click “Upload Documents for Compliance and Purchase Review”



Compliance and Purchase Document Upload Loan Inquiry

Search Type: Loan Number Last Name Address

Loan Number:

Loan ID	CalHFA 1st	Type	Last Name	First Name	Status	Address	
1303581		CalPLUS Conventional with ZIP 4%	DAWSON	GINA	440	1112 ELECTRIC AVENUE	<input type="button" value="Select"/>

Loan Inquiry page listing loan reservations

HELPFUL TIPS FOR UPLOADING LOAN DOCUMENTS:

- This site works best with the Chrome browser. All other browsers may encounter problems. To download Chrome, please visit www.google.com/chrome
- If you do not have access to CalHFA’s MAS lender portal please visit www.calhfa.ca.gov and click on MAS Login to register. Contact your company MAS system administrator for approval.
- All documents must be in PDF format and must not be locked or encrypted.
- Roll the mouse over the question mark icon for additional help.
- A note of incompleteness in red text will be visible until you have uploaded all necessary documents. At that time the note will disappear and the option to submit documents will appear. Don’t forget to submit.
- View our Uploading Purchase Document video at www.calhfa.ca.gov/about/videos/sftraining.htm

4. Then click on **“Upload Purchase Documents”**

TIP If you don't see the option to upload purchase document and instead you only see **“Upload Compliance Documents”** you are currently viewing details of the First loan. Select the correct loan from the associated loan table and try again.

5. From the Purchase Review Document Upload screen click on **“Choose Files.”**

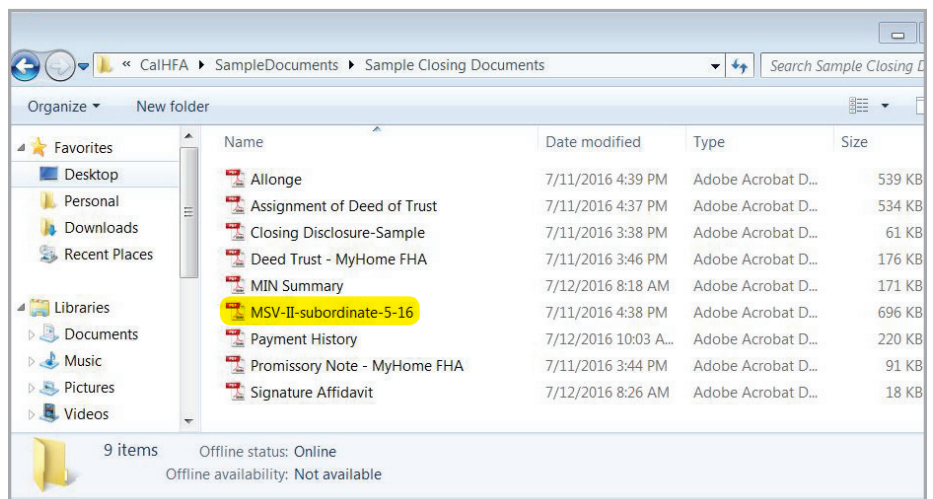
6. Navigate to the location where you saved the document, then click **“Open.”**

Loan Type	Loan ID	Status	
CalPLUS Conventional with ZIP 4%	1303581	440	Select

Loan Details page, click **“Upload Purchase Documents”**

Document Type	Choose Files	No file chosen
Mortgage Submission Voucher (MSV II)	Choose Files	No file chosen
Promissory Note and Endorsement/Allonge	Choose Files	No file chosen
Deed of Trust	Choose Files	No file chosen
Assignment of Deed of Trust	Choose Files	No file chosen
Closing Disclosure/TIL	Choose Files	No file chosen
Signature Affidavit	Choose Files	No file chosen
1st Loan Payment History	Choose Files	No file chosen
MIN Summary	Choose Files	No file chosen

Purchase Review Document upload page, click **“Choose Files”**



Navigate to file you wish to upload

7. The name of your document will now appear on the Purchase Review Document Upload page. Click the **“Upload Documents”** button at the bottom of the page.

8. The Purchase Review Document Upload - Success page will confirm your upload. Please also see your email inbox for a confirmation of documents added.

9. If you have met the document requirement you will see the option to **“Submit Purchase Package to CalHFA.”** Your file will not be reviewed unless you click the **“Submit Package”** button in the next screen.

TIP It is important to note you can always add to your document folders by returning to the upload screen but you will not be able to delete documents once you have submitted your file to CalHFA for review.

Purchase Review Document Upload

LoanID 1303582
 Loan Type Zero Interest Program (ZIP)
 Borrower Name DAWSON | GINA
 Status Description 440 - Conditional Approval as of 07/13/2016

Loan Purchase Package is incomplete, your review cannot be initiated. Please upload all required documents.

Mortgage Submission Voucher (MSV II)	Choose Files	MSV-II-subor...te-5-16.pdf
Promissory Note and Endorsement/Allonge	Choose Files	No file chosen
Deed of Trust	Choose Files	No file chosen
Assignment of Deed of Trust	Choose Files	No file chosen
Closing Disclosure/TIL	Choose Files	No file chosen
Signature Affidavit	Choose Files	No file chosen
1st Loan Payment History	Choose Files	No file chosen
MIN Summary	Choose Files	No file chosen

Upload Documents

The name of your document appears. Click “Upload Documents.”

Purchase Review Document Upload - Success

LoanID 1303582
 Loan Type Zero Interest Program (ZIP)
 Borrower Name DAWSON | GINA
 Status Description 440 - Conditional Approval as of 07/13/2016

The following document(s) have been successfully uploaded.

Submit Purchase Package to CalHFA

Document Name	Document Type	Upload Date	Upload by
MSV-II-subordinate-5-16.pdf	Mortgage Submission Voucher (MSV II)	7/15/2016 11:01:28 AM	ejohnson@calhfa.ca.gov
Allonge.pdf	Promissory Note and Endorsement/Allonge	7/15/2016 11:01:28 AM	ejohnson@calhfa.ca.gov
Promissory Note - MyHome FHA.pdf	Promissory Note and Endorsement/Allonge	7/15/2016 11:01:28 AM	ejohnson@calhfa.ca.gov

If requirements are met, click “Submit Purchase Package to CalHFA”

Signature Affidavit	Choose Files	No file chosen
Signature Affidavit.pdf	ejohnson@calhfa.ca.gov	7/15/2016 11:01:30 AM
1st Loan Payment History	Choose Files	No file chosen
Payment History.PDF	ejohnson@calhfa.ca.gov	7/15/2016 11:04:20 AM
MIN Summary	Choose Files	No file chosen
MIN Summary.PDF	ejohnson@calhfa.ca.gov	7/15/2016 11:04:20 AM

Upload Documents Submit Purchase Package to CalHFA

If requirements are met, click “Submit Purchase Package to CalHFA”

Loan Submission Confirmation

I have submitted all documents required for purchase review. I understand if my package is incomplete or incorrect it will be suspended or rejected.

Cancel Submit Package

Your file will not be reviewed unless you click “Submit Package”

10. Once you submit you will notice the status description changed from **“440 - Conditional Approval as of ...”** to **“510 - Purchase file received as of ...”**

Check your email, you will receive an email confirming you have submitted your purchase package.

Submitted files are reviewed in the order they are received.

TIP If you upload additional documents once the file has been assigned to a reviewer you do not need to contact the reviewer, the reviewer will be copied on the document upload confirmation email.

Purchase Review Document Upload

LoanID 1303582
 Loan Type Zero Interest Program (ZIP)
 Borrower Name DAWSON | GINA
 Status Description **510 - Purchase file received as of 07/15/2016**

Mortgage Submission Voucher (MSV II)		Choose Files	No file chosen
MSV-II-subordinate-5-16.pdf	ejohnson@calhfa.ca.gov	7/15/2016 11:01:30 AM	
Promissory Note and Endorsement/Allonge		Choose Files	No file chosen
Allonge.pdf	ejohnson@calhfa.ca.gov	7/15/2016 11:01:30 AM	
Promissory Note - MyHome FHA.pdf	ejohnson@calhfa.ca.gov	7/15/2016 11:01:30 AM	
Deed of Trust		Choose Files	No file chosen
Deed Trust - MyHome FHA.pdf	ejohnson@calhfa.ca.gov	7/15/2016 11:01:30 AM	
Assignment of Deed of Trust		Choose Files	No file chosen
MIN Summary.PDF	ejohnson@calhfa.ca.gov	7/15/2016 11:01:30 AM	
Closing Disclosure/TIL		Choose Files	No file chosen

Status Description code is now “510 - Purchase file received ...”

TIP Check our website to see what day our reviewers are working on and determine where your file is in line.

File Review Status Updated 07/15/2016	
Loans in line	Review Date
Compliance	
80	July 12
Post-closing	
MyHome/ZIP/ECTP	
485	July 6
Subordinations	
18	July 14