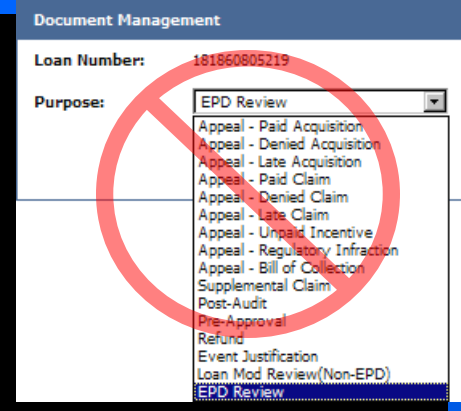# VALERI

Document Manager
&
Post-Audit Redesigns

Submitting Documents
(Document Manager)

We have updated the Submit Documents feature of the Servicer Web Portal as displayed below.

To submit a document, select the Add New Document link.

Document Management

Loan Number: 181860805219

Purpose: EPD Review

- Appeal - Paid Acquisition
- Appeal - Denied Acquisition
- Appeal - Late Acquisition
- Appeal - Paid Claim
- Appeal - Denied Claim
- Appeal - Late Claim
- Appeal - Unpaid Incentive
- Appeal - Regulatory Infraction
- Appeal - Bill of Collection
- Supplemental Claim
- Post-Audit
- Pre-Approval
- Refund
- Event Justification
- Loan Mod Review(Non-EPD)
- EPD Review

VALERI
Servicer Web Portal

- Loan Search
- Transfer Loan
- Exit Portal
- Frank
- Loan Information
- Report an Event
- Submit Documents
- Appeals

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Submit Documents

Loan Quick Search

This screen is used to submit electronic documentation to the VA.

Loan Number: 393960999999   Add New Document

Process Name	Process Date	Document Type	Required	Document Name	Uploaded By	Upload Date

All documents will now be associated with a VALERI process rather than the previous list of document purposes.

You can also upload a general document when there is no applicable process.

You can associate one file with multiple Document Types by holding the CTRL key and selecting types.

Enter a Document Name then locate the file and click UPLOAD.

VALERI
Servicer Web Portal

- Loan Search
- Transfer Loan
- Exit Portal
- Frank
- Loan Informati
- Report an Even
- Submit Docume
- Appeals

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Submit Documents

Loan Quick Search

This screen is used to submit electronic documentation to the VA.

Loan Number: 393960999999

Add New Document

Process Name	Process Date	Document Type	Required	Document Name	Uploaded By	Upload Date

VALERI Document Manager Upload - Windows Internet Explorer

Upload a Document

Process Name: General

Document Type(s): Financial Statement, HUD-1

➡ Document Name: Test Doc 1

➡ File: C:\Documents and Settings\gychodg\Desktop\ | Browse...

*To select multiple Document Types, press the ctrl key and select

Upload   Close

Internet   100%

The file is displayed for each Document Type selected.

If needed, you can delete your document by clicking on the Remove link.

VALERI
Servicer Web Portal

- 🔍 Loan Search
- 🔄 Transfer Loan
- 🚪 Exit Portal
- 👤 Frank

- ℹ️ Loan Information
- 📋 Report an Event
- 📄 Submit Documents
- ⚖️ Appeals

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Submit Documents

Loan Quick Search

This screen is used to submit electronic documentation to the VA.

Loan Number: 393960999999   Add New Document

Process Name	Process Date	Document Type	Required		Document Name	Uploaded By	Upload Date	
General	01-01-1900	Financial Statement	No	Add	Test Doc	Frank	06-18-2010	Remove
General	01-01-1900	HUD-1	No	Add	Test Doc	Frank	06-18-2010	Remove

Post-Audits

Each Document Type will only be requested once, regardless of the number of instances for the associated item.

VALERI
Servicer Web Portal

- 🔍 Loan Search
- 🔄 Transfer Loan
- 🚪 Exit Portal
- 👤 Frank

- ℹ️ Loan Information
- 📥 Report an Event
- 📤 Submit Documents
- 🗄️ Appeals

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📤 Submit Documents

Loan Quick Search [   ] 🔍

This screen is used to submit electronic documentation to the VA.

Loan Number: 393960999999   Add New Document

Process Name	Process Date	Document Type	Required	Document Name	Uploaded By	Upload Date	
Perform Post-Audit (ResultsOfSale)	05-01-2010	Analysis for for bid calculation or credit to indebtedness (includes analysis of equity)	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Appraiser's invoice	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Bill and evidence of payment	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Deficiency waiver letter	No	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Itemized attorney invoice	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Itemized invoice for service provided	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Ledger/loan payment history	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Mortgage note (includes variable mortgage addendums if applicable - GEM, ARM, GPM)	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Official foreclosure document (per state requirements)	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Property inspection report	Yes	Add		01-01-0001	Remove
Perform Post-Audit (ResultsOfSale)	05-01-2010	Servicing case notes	Yes	Add		01-01-0001	Remove

Adding a file containing **one** document type.

Upload a file containing **one** Document Type by selecting an Add link next to one of the documents within the file.

The Process Name and selected Document Type fields are pre-populated.

To add a file containing **only** the selected Document Type, enter a Document Name and locate the file.

Note: You do not need to make a selection under 'Additional Document Types'.

The document is submitted to VA.

Adding a file containing **multiple** document types.

Upload a file containing **multiple** Document Types by selecting an <u>Add</u> link next to one of the documents within the file.

Include additional Document Types by holding the CTRL button and selecting each additional Document Type contained within the file.

Note: You do not have to re-select the first Document Type.

Enter a Document Name and locate the file, then click on the UPLOAD button.

The document is submitted to VA. It will be listed next to every Document Type you selected.