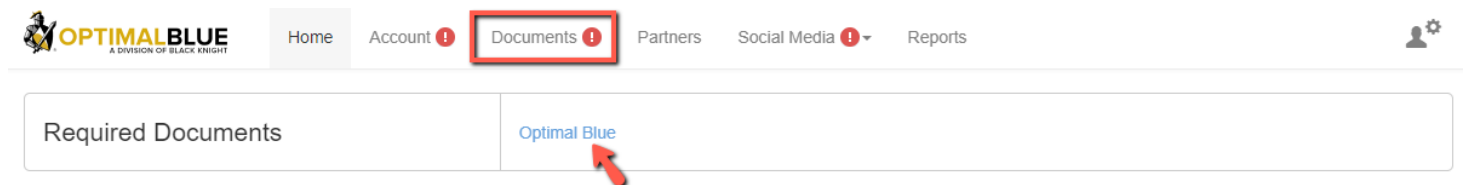**Solution home Lender / Originator Documents**

Locating and Uploading Investor Requested Documents

Modified on: Tue, 8 Feb, 2022 at 9:49 AM

When logging in users may encounter an alert icon of outstanding documents (shown below).

To access, navigate to the 'Documents' tab located in the top menu. Any documents required by all investors will be listed here by default.

> **Tip:** From the 'Home' tab, users can select the investor company name within the 'Required Documents' section and be taken to the document list for that specific partner. Click the following link for more information on the 'Home' tab - **Lender Home Page**
> **(https://o.comergencesupport.com/support/solutions/articles/8000016242-lender-home-page)**

Select specific investor in the 'Partners' filter to view the list of documents requested by the selected investor. After selecting, the 'Channels' and 'Questionnaire' filters become available.

Documents

Partner
| All Partners ▼ |

Channels
| Select ▼ |

Questionnaire
| Select ▼ |

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`Required` 🔗 Template 🕘 History

[Upload Document]
[Choose from Library]

2013 Audited Financials
2013 Audited Financials

`Required` 🕘 History

[Upload Document]
[Choose from Library]

2014 Audited Financials
2014 Audited Financials

`Required` 🕘 History

[Upload Document]
[Choose from Library]

Affiliate Relationship Form
Affiliate Relationship Form

`Required` 🔗 Template 🕘 History

[Upload Document]
[Choose from Library]

Lenders can visually determine which documents are complete (green) and which documents are still required or expired (red).

Please Note: Documents labeled 'Expired' and highlighted in red do not affect the application workflow and are an indicator that the document may be outdated based on general best practice timeframes. Documents that reach expiration are not included in the Weekly Status Report and are not presented on the lender 'Home' page as a required item.

Lenders can choose to upload the document to satisfy all potential requests ahead of time or choose not to take any action until requested.

The label 'from Library' indicates that as lenders upload the document it will also be saved into the **'Document Library'** (https://o.comergencesupport.com/solution/articles/8000016253-client-document-library). This feature is initiated by the investor and helps clients automatically store commonly requested documents to be used for future applications.

Uploading Documents

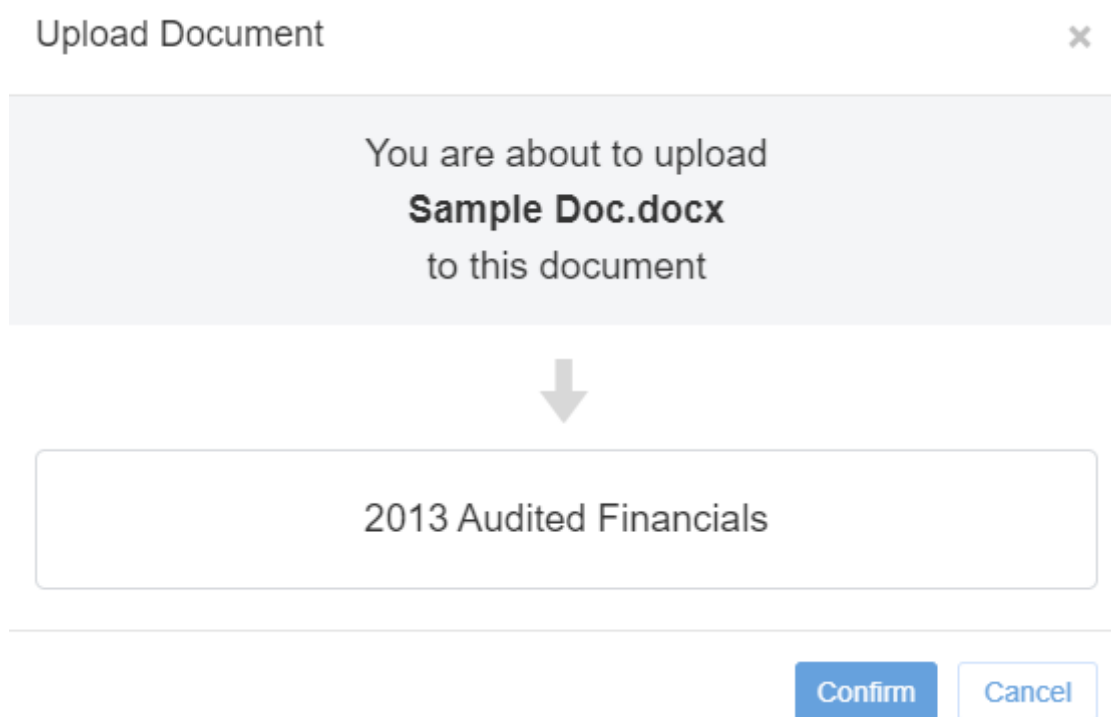There are four ways to fulfill a document requirement:
1. Clicking 'Upload' option and select a file from your local file system

2. Drag and drop the local file onto the appropriate document placeholder

3. Choose from Library, if the document is stored within the library

4. If the investor has integrated DocuSign, a 'DocuSign' option will be available for templates for e-signature (see DocuSign section below for more details)

If an email notification is received requesting to upload a document specifically to the 'Library', locate the document within the library sub tab and 'Upload' it.

Each time a document is uploaded, a confirmation window will pop up to verify the file and document is correct. Click 'Upload' to complete the operation. If it is not correct, click 'Cancel' and select the correct document:

Upload Document   ✕

> You are about to upload
> **Sample Doc.docx**
> to this document
>
> ↓
>
> 2013 Audited Financials

Confirm   Cancel

Investors upon review will determine if the upload is sufficient and will notify lenders through email notification or directly outside of the system. For an example of the email notification, click **HERE.** **(https://o.comergencesupport.com/en/support/solutions/articles/8000066186)**

If you wish to drag and drop the document into the window, simply click the local file and hold down the mouse button while you drag it into the browser window and onto the document you wish to upload.

Again, the system will ask you to confirm your action. Click 'Upload' to complete the operation. If it is not correct, click 'Cancel' and select the correct document.

> **Please Note:** The system will automatically fulfill any previously uploaded investor specific document if the document has been uploaded within the last 60 days.

DocuSign

If the option to DocuSign is available. Below is an example of how to e-sign.
Select the 'DocuSign' option:

A new tab will open to the DocuSign template with further instructions.

Once completed, the document place holder will show as green.

If the below message is viewed, please contact partnered company that the request is from, so they may update DocuSign if needed, or they may have further instructions:

History

To view the history of a document, click the word 'History' next to the name. This can help determine previous uploaded documents by verifying either the date or the file name, as well as actions to the

document, such as an investor re-request.

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Date	Action	Action by	Document
10/22/2021 13:45	Document uploaded	John Smith	W-9 dated 4-16-2014
10/31/2015 00:02	Renewal Launched	System	–
03/31/2014 12:05	Document Uploaded	John Smith	Bouncedemailservice
10/08/2013 12:03	Template uploaded	Larry Mize	Bouncedemailservice
09/03/2013 14:12	New Channel and settings added: Wholesale, Required for New, Required for Renewal	Larry Mize	–

More articles

- **Your Document Library**
- **Locating and Uploading Investor Requested Documents**