



Fannie Mae®

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# DUS DocWay™ Loan Documents User Guide

November 2019





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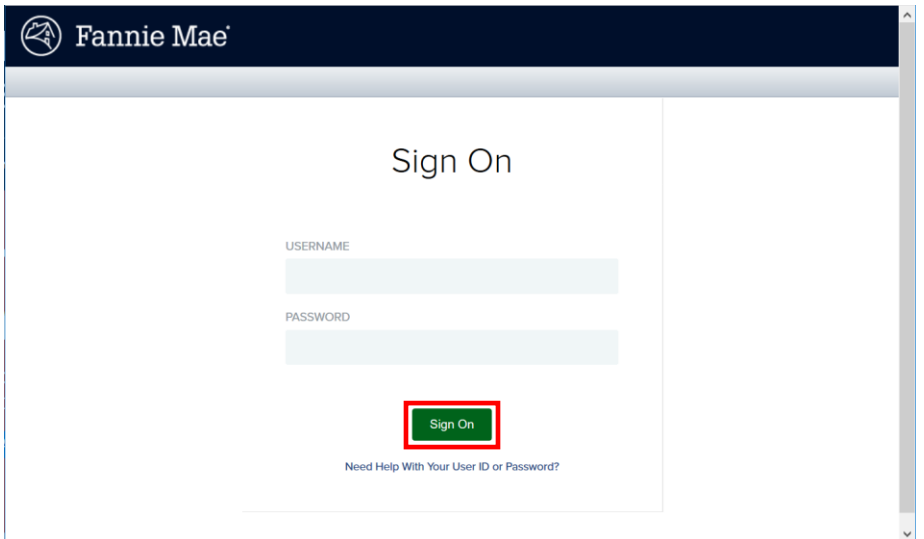
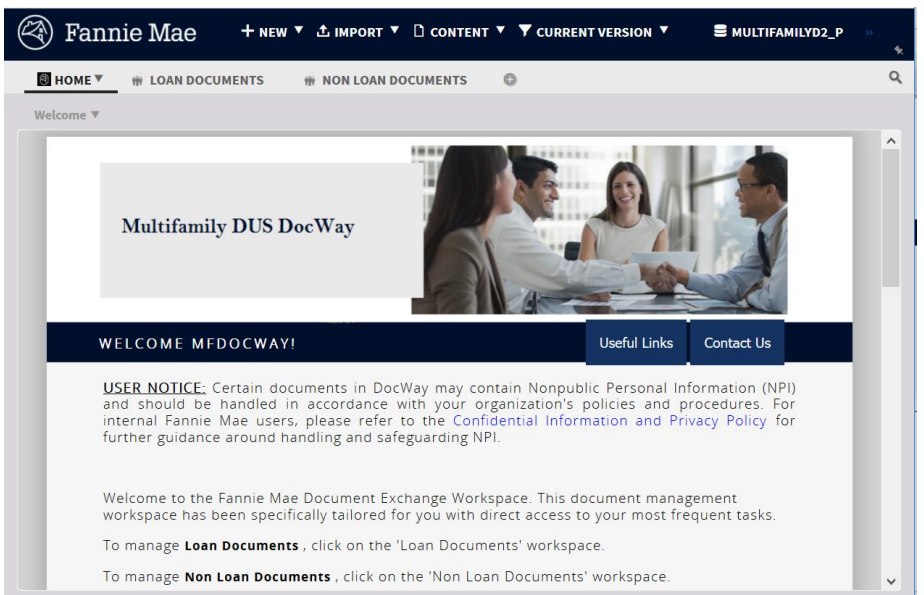
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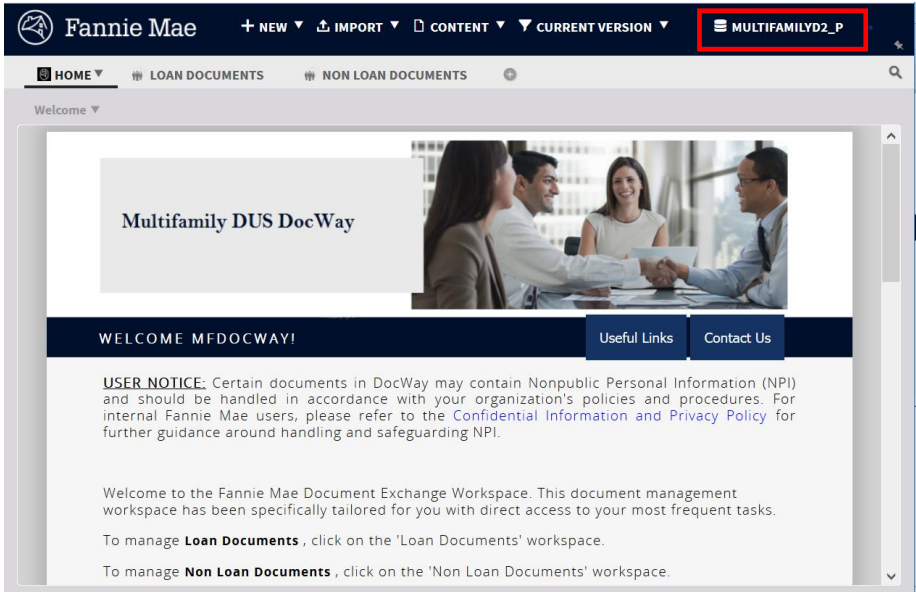
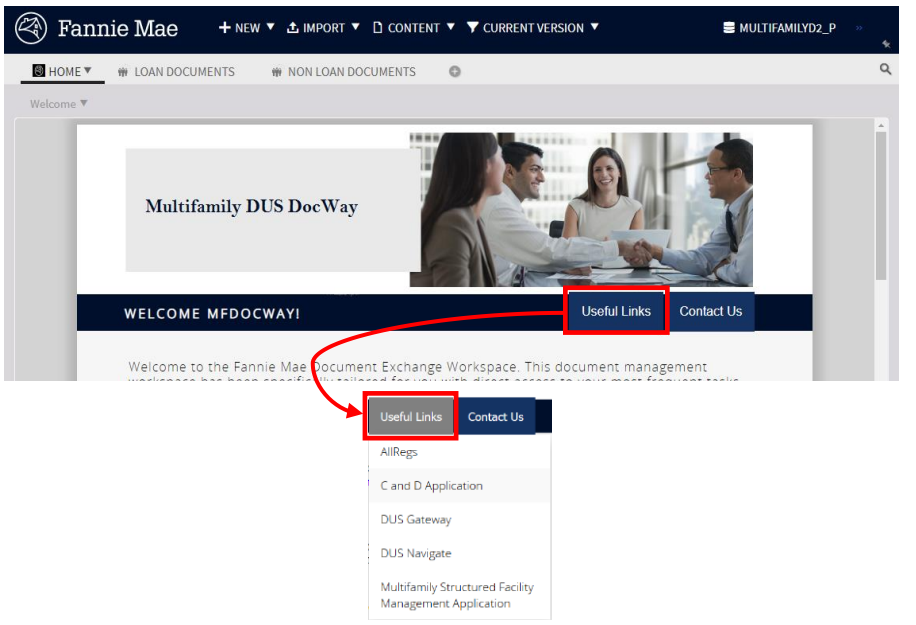
# Getting Started with DUS DocWay

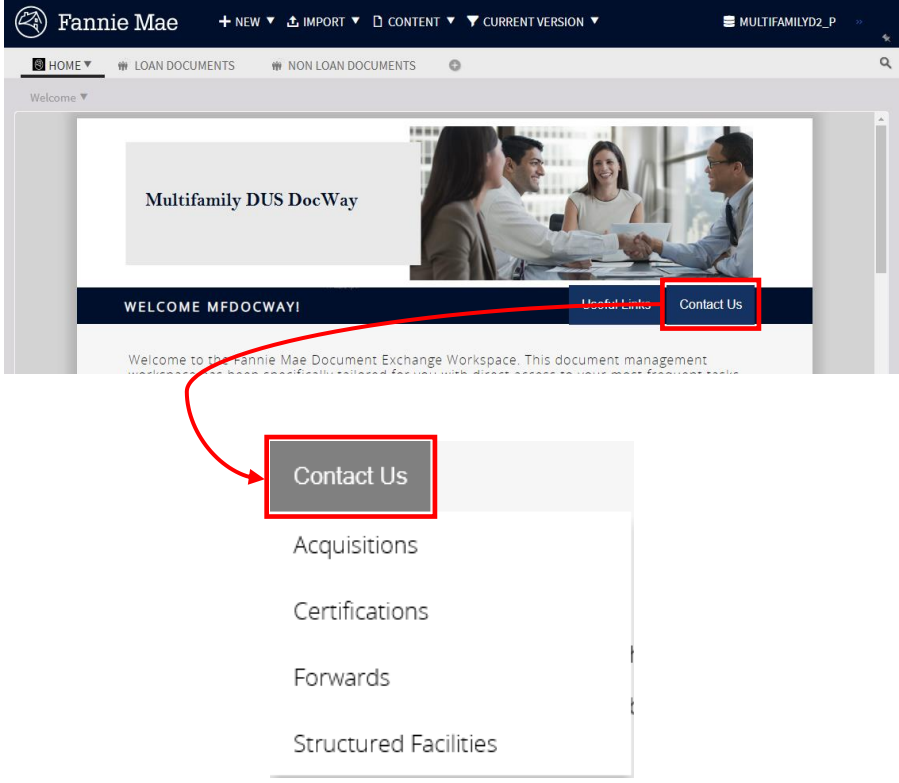
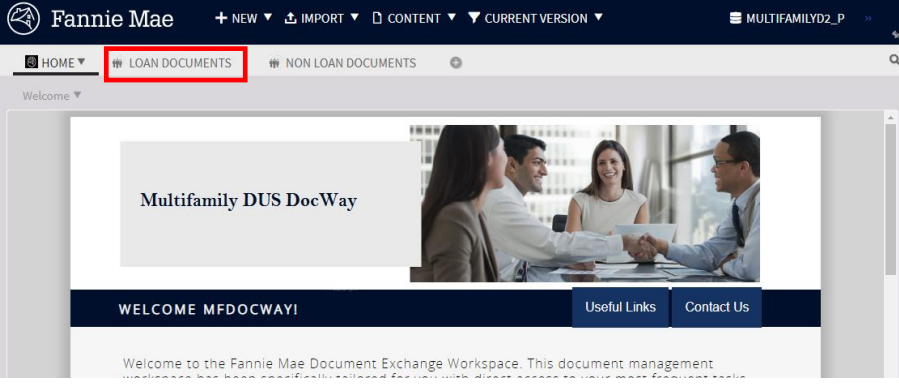
DUS DocWay is accessed via the internet using either Internet Explorer (Version 11) or Google Chrome. Follow the steps below to access DUS DocWay.

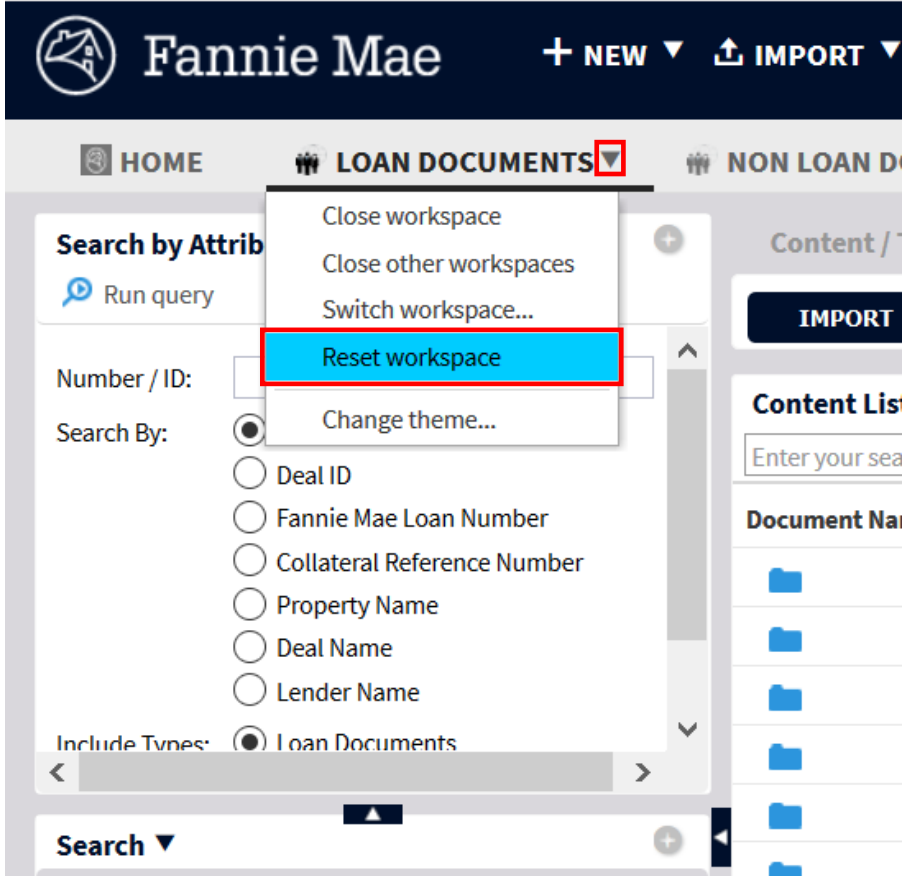
Steps	Additional Information/Results
<p>1. Obtain usernames and passwords.</p>	<p>Login information can be obtained by contacting your company's Corporate Administrator. (The Corporate Administrator serves as your local Technology Manager Administrator.) They can provide you with a username and password to access DUS DocWay.</p>
<p>2. Enter the DocWay URL in your browser's search bar:  <a href="https://docway.fanniemae.com/D2">https://docway.fanniemae.com/D2</a></p> <p>3. The <i>Sign On</i> page will open, enter your username and password and click on <b>Sign On</b></p>	
<p>4. The <i>Welcome</i> page will display upon login.</p>	

# Welcome Page Navigation

On the *Welcome page*, you can view your login information, access useful links, find out how to contact Fannie Mae for help, or open the *Loan Documents* workspace. Follow the steps below to navigate the *Welcome* screen.

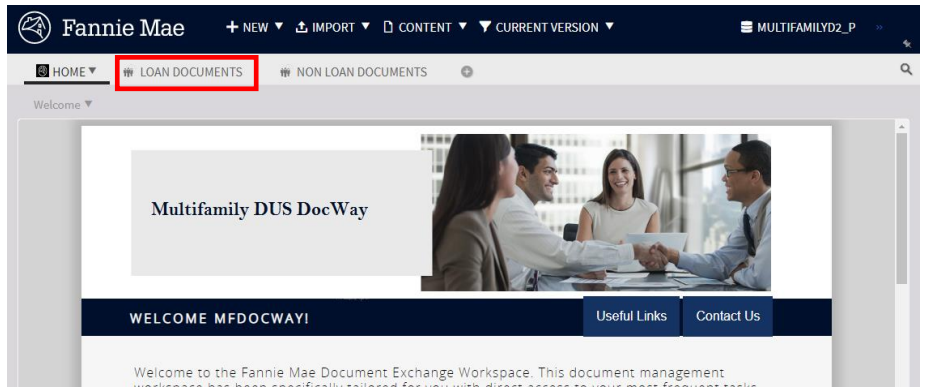
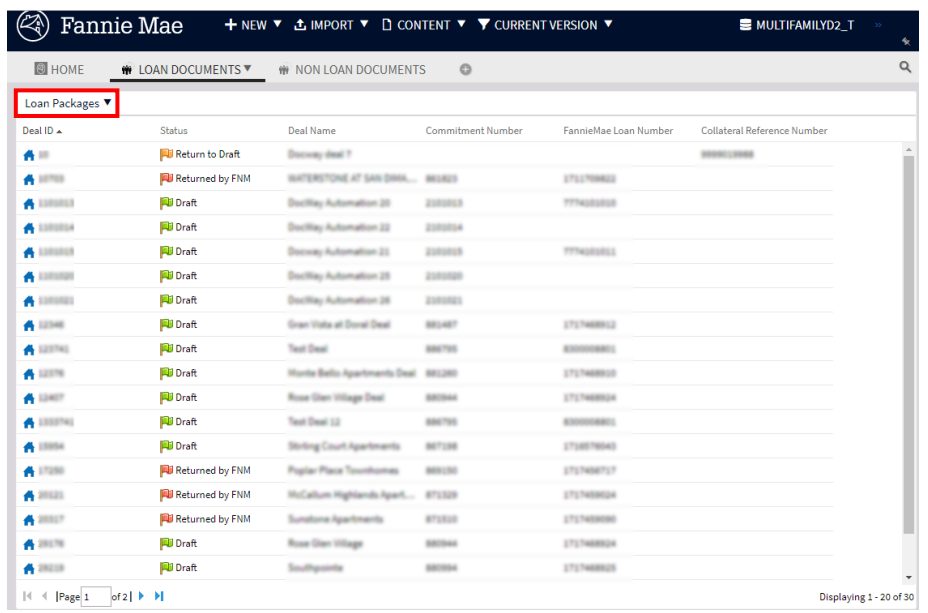
Steps	Additional Information/Results
<p>1. When you have successfully logged in, the <i>Welcome</i> page is displayed.</p>	<p>On the DUS DocWay Welcome page, the logged in user's full name and email address is displayed in the top right corner of the window.</p> 
<p>2. Click on <b>Useful Links</b> to be directed to a list of links to related applications, and the Fannie Mae Selling and Servicing Guide through <i>AllRegs</i> or <i>DUS Navigate</i>.</p>	

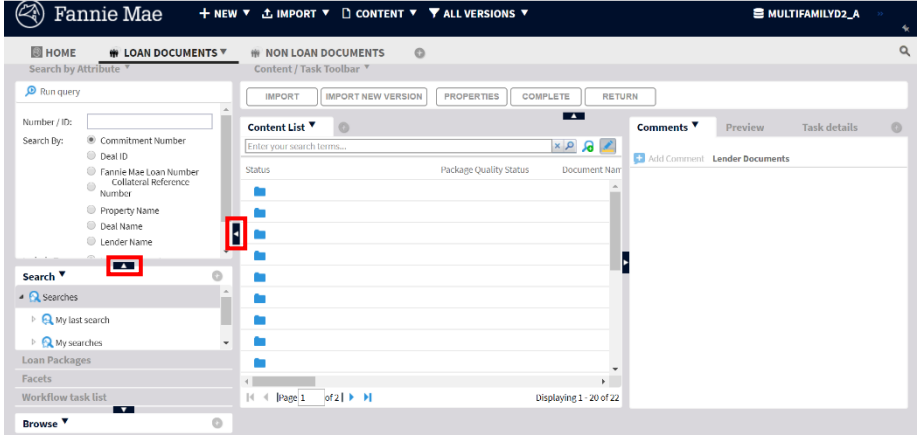
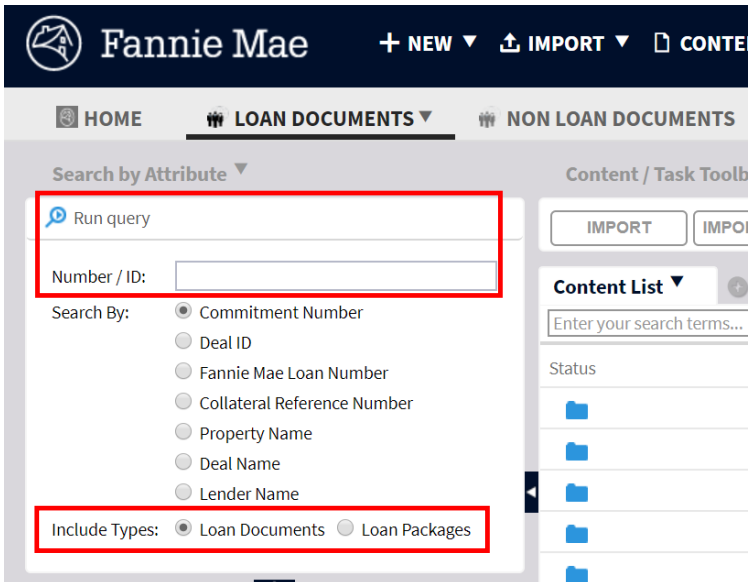
Steps	Additional Information/Results
<p>3. Click on <b>Contact Us</b> to email a selected department at Fannie Mae if you have questions.</p>	 <p>The screenshot shows the Fannie Mae DocWay interface. At the top, there is a navigation bar with the Fannie Mae logo and several menu items: '+ NEW', 'IMPORT', 'CONTENT', and 'CURRENT VERSION'. Below this is a secondary navigation bar with 'HOME', 'LOAN DOCUMENTS', and 'NON LOAN DOCUMENTS'. The main content area features a banner for 'Multifamily DUS DocWay' with a 'WELCOME MFDOCWAY!' message. A 'Contact Us' button is highlighted in a red box in the top right of the banner area. A red arrow points from this button to a larger 'Contact Us' button in a dropdown menu that also lists 'Acquisitions', 'Certifications', 'Forwards', and 'Structured Facilities'.</p>
<p>4. Click on the <b>Loan Documents</b> tab to open the <i>Loan Documents</i> workspace.</p>	 <p>The screenshot shows the Fannie Mae DocWay interface with the 'LOAN DOCUMENTS' tab highlighted in a red box in the secondary navigation bar. The rest of the interface, including the banner and 'WELCOME MFDOCWAY!' message, is identical to the previous screenshot.</p>

Steps	Additional Information/Results
<p>5. Optional Step: To reset the workspace, click on the dropdown <b>arrow</b> on the <i>Loan Documents</i> tab. Click on <b>Reset workspace</b> to return the <i>Workspace</i> to its default state; this action will remove search results and re-adjusts the columns and rows to standard size.</p> <p>This action will also refresh the data displayed to include all updates made by all users.</p>	 <p>The screenshot shows the Fannie Mae web application interface. At the top, there is a navigation bar with the Fannie Mae logo, the text 'Fannie Mae', and buttons for '+ NEW' and 'IMPORT'. Below this is a secondary navigation bar with tabs for 'HOME', 'LOAN DOCUMENTS', and 'NON LOAN D'. The 'LOAN DOCUMENTS' tab is active and has a dropdown arrow. A dropdown menu is open from this tab, listing several options: 'Close workspace', 'Close other workspaces', 'Switch workspace...', 'Reset workspace', and 'Change theme...'. The 'Reset workspace' option is highlighted with a red rectangular box. Below the navigation bar, there is a search section with the text 'Search by Attribution' and a 'Run query' button. There are also radio buttons for 'Search By' with options: Deal ID, Fannie Mae Loan Number, Collateral Reference Number, Property Name, Deal Name, Lender Name, and Loan Documents (which is selected). At the bottom of the search section, there is a 'Search' button and a search input field.</p>

# Loan Documents Workspace Navigation

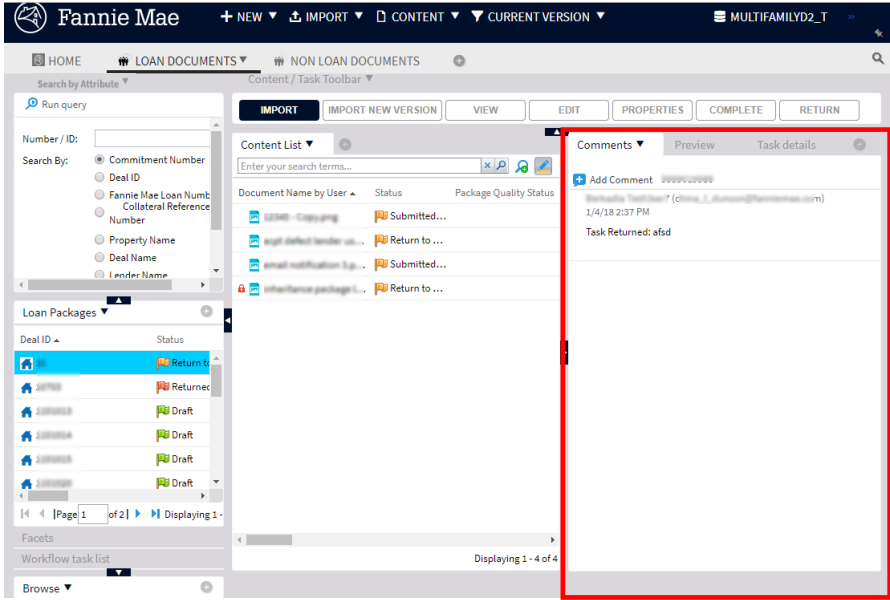
*Loan Documents Workspace Navigation* allows you to: Navigate the Loan Documents workspace efficiently.

Steps	Additional Information/Results																																																																																																																																																																																										
<p>1. Click on the <b>Loan Documents</b> tab to open the Loan Documents workspace.</p>	 <p>The screenshot shows the top navigation bar of the Fannie Mae DocWay interface. The 'LOAN DOCUMENTS' tab is highlighted with a red box. Other tabs include 'HOME', 'NON LOAN DOCUMENTS', and 'MULTIFAMILYD2_P'. Below the navigation bar is a banner for 'Multifamily DUS DocWay' with 'WELCOME MFDOCWAY!' and buttons for 'Useful Links' and 'Contact Us'.</p>																																																																																																																																																																																										
<p>2. Each of the windows can be opened to full-screen by double clicking on the text of the label. For example, double click on the <b>Loan Packages</b> label to expand the <i>Loan Packages</i> window to full screen. Double click the label again to return the window to its original size.</p>	 <p>The screenshot shows the 'Loan Packages' window expanded to full-screen. The 'Loan Packages' label is highlighted with a red box. The window displays a table of loan packages with columns for Deal ID, Status, Deal Name, Commitment Number, FannieMae Loan Number, and Collateral Reference Number. The table contains 18 rows of data. At the bottom, there is a pagination control showing 'Page 1 of 2' and a 'Displaying 1 - 20 of 30' indicator.</p> <table border="1"> <thead> <tr> <th>Deal ID</th> <th>Status</th> <th>Deal Name</th> <th>Commitment Number</th> <th>FannieMae Loan Number</th> <th>Collateral Reference Number</th> </tr> </thead> <tbody> <tr> <td>10760</td> <td>Return to Draft</td> <td>Discovery Deal 7</td> <td>861823</td> <td>371748822</td> <td>888888888</td> </tr> <tr> <td>10765</td> <td>Returned by FNM</td> <td>WATERSTONE AT SAN DIMAS...</td> <td>861823</td> <td>371748822</td> <td></td> </tr> <tr> <td>1100013</td> <td>Draft</td> <td>DocWay Automation 20</td> <td>2100013</td> <td>371400010</td> <td></td> </tr> <tr> <td>1100014</td> <td>Draft</td> <td>DocWay Automation 21</td> <td>2100014</td> <td></td> <td></td> </tr> <tr> <td>1100015</td> <td>Draft</td> <td>DocWay Automation 21</td> <td>2100015</td> <td>371400011</td> <td></td> </tr> <tr> <td>1100016</td> <td>Draft</td> <td>DocWay Automation 20</td> 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Steps	Additional Information/Results
<p>3. You can adjust your workspace left clicking on the <b>black bars</b> at the borders of the windows and dragging them left or right, up or down.</p> <p>4. If you need to return to the original (default) layout, click on the <b>Loan Documents</b> tab and select <b>Reset Workspace</b> from the dropdown menu; you will be returned to the <i>Welcome</i> page and the <i>Loan Documents Workspace</i> will be restored to its original appearance. You can refresh your view of data in an individual window by clicking on the appropriate label and selecting <b>Refresh</b> from the dropdown menu.</p>	
<p>5. Each of the windows on the <i>Loan Documents Workspace</i> has a different function. The <i>Search by Attribute</i> window at the top left of the screen allows you to search for documents or loan packages. To conduct a search, select either the <i>Loan Packages</i> or <i>Documents</i> radio button at the bottom of the window, then choose your search term (<i>Search By</i>), and then enter the <i>Number/ID</i> and click on <b>Run query</b>.</p>	

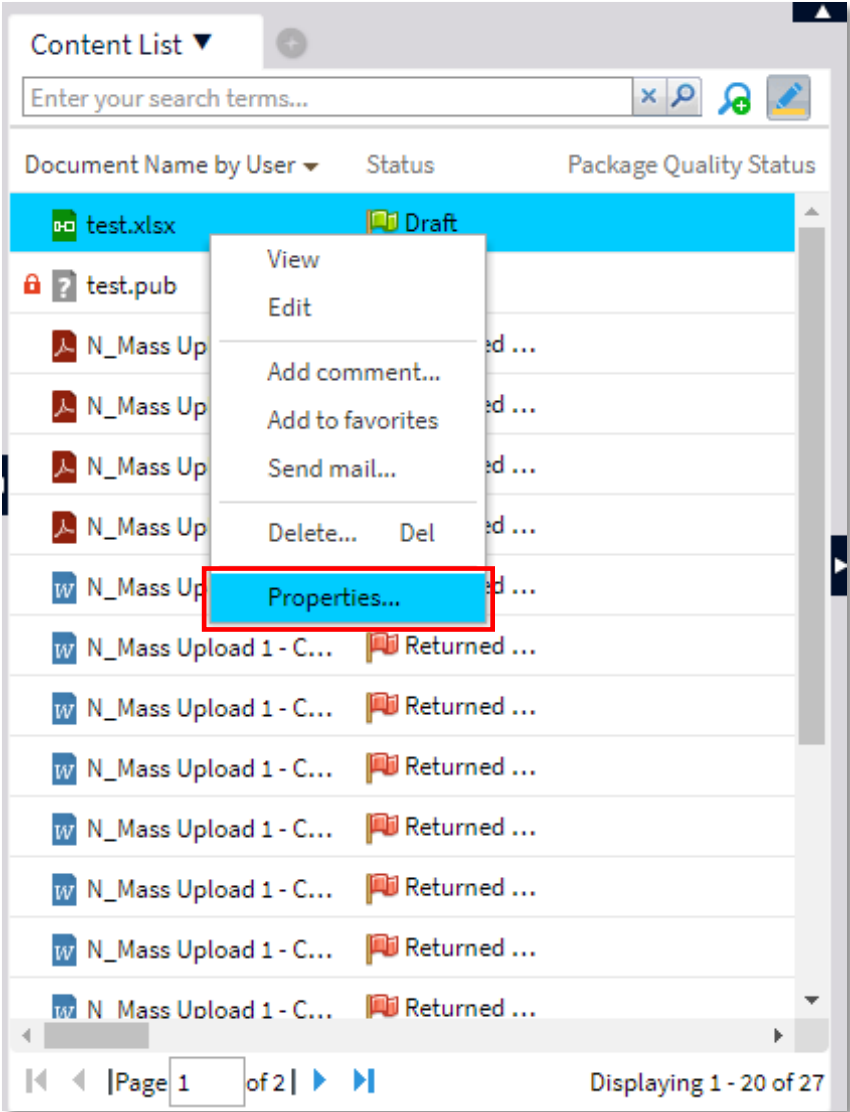


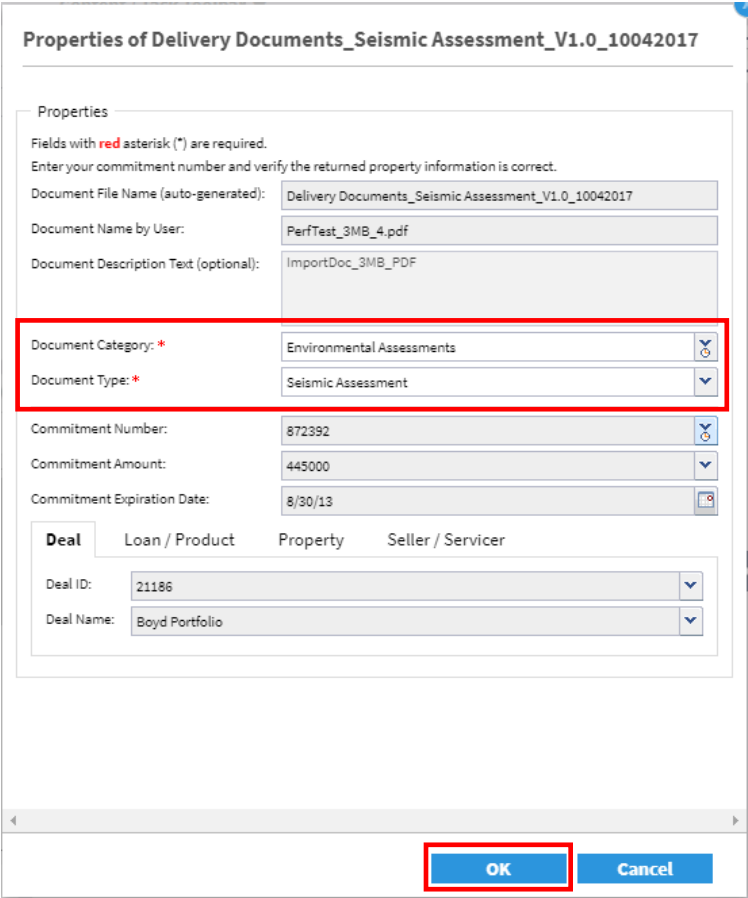
Steps	Additional Information/Results
<p>6. The results of the query are displayed in the <i>Content List</i> window in the center of the screen. When you search for loan packages you will see the package or packages that match your search term listed in the <i>Content List</i>. If you then want to see the documents contained in a loan package, double click on the loan package.</p>	
<p>7. The <i>Loan Packages</i> window allows you to see the status of the loan packages that you are working on. Loan packages that have already been submitted to Fannie Mae are not displayed here. To display a loan package with a status of “submitted”, use the <i>Search by Attribute</i> window to run a query.</p>	

Steps	Additional Information/Results
<p>8. The <i>Comments</i> window shows you all of the comments that pertain to the selected loan package.</p>	 <p>The screenshot shows the Fannie Mae DocWay interface. On the left, there are search filters and a list of loan packages. The main area displays a 'Content List' with columns for Document Name by User, Status, and Package Quality Status. A 'Comments' window is open on the right, showing a comment from 'Bernadette Testarone' (citing a user ID) dated 1/4/18 2:37 PM with the text 'Task Returned: asfd'. The 'Comments' window is highlighted with a red border.</p>

## Update Document Category and Type

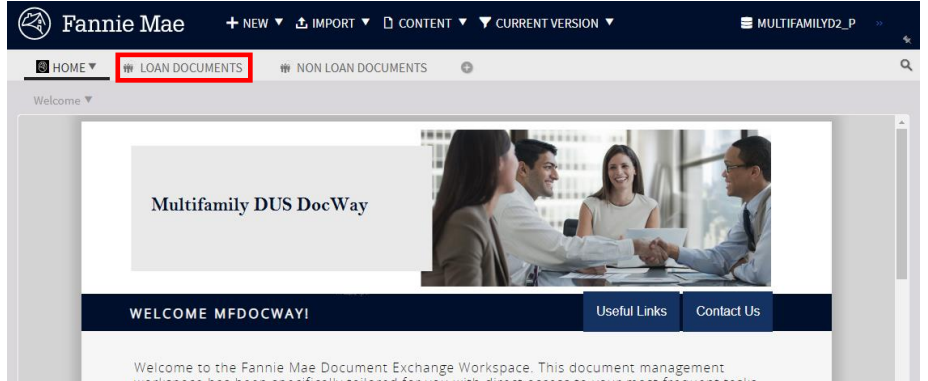
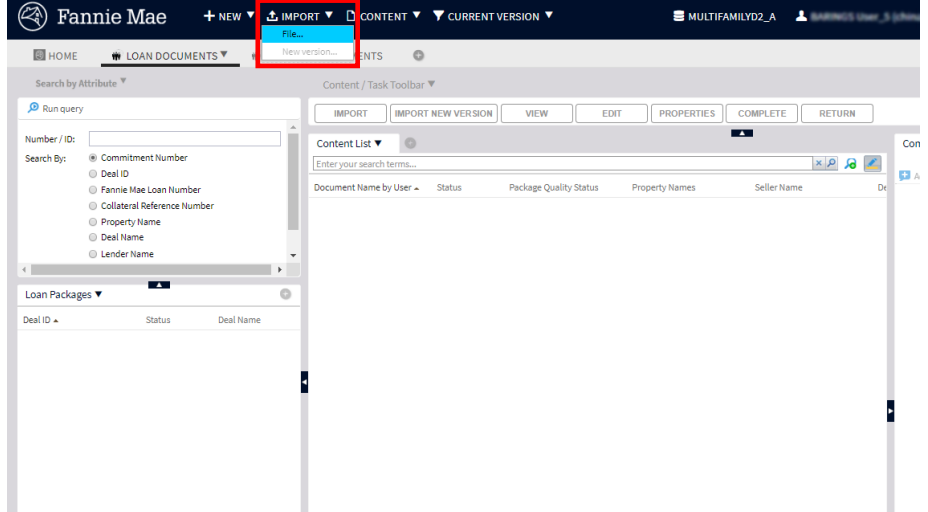
You may update a selected document's **Document Category** and **Document Type** at any time before the loan package is submitted to Fannie Mae.

Steps	Additional Information/Results
<p>1. To modify the document category or type of a document in the <i>Content List</i>, right click on the document and select <b>Properties</b> from the dropdown menu. The <i>Properties of Delivery Documents...</i> window will be displayed.</p>	 <p>The screenshot shows a 'Content List' window with a search bar and a table of documents. The table has columns for 'Document Name by User', 'Status', and 'Package Quality Status'. The first row is highlighted in blue and has a context menu open over it. The menu items are: View, Edit, Add comment..., Add to favorites, Send mail..., Delete... Del, and Properties... (highlighted with a red box). The document name is 'test.xlsx' and its status is 'Draft'. Other rows in the table show documents named 'test.pub' and 'N_Mass Up' with various statuses like 'Returned'.</p>

Steps	Additional Information/Results
<p>2. With the <i>Properties...</i> window displayed, click on the <b>Document Category</b> dropdown and select the appropriate document category, then click on the <b>Document Type</b> dropdown and select the appropriate document.</p> <p>3. When finished, Click <b>OK</b>.</p>	

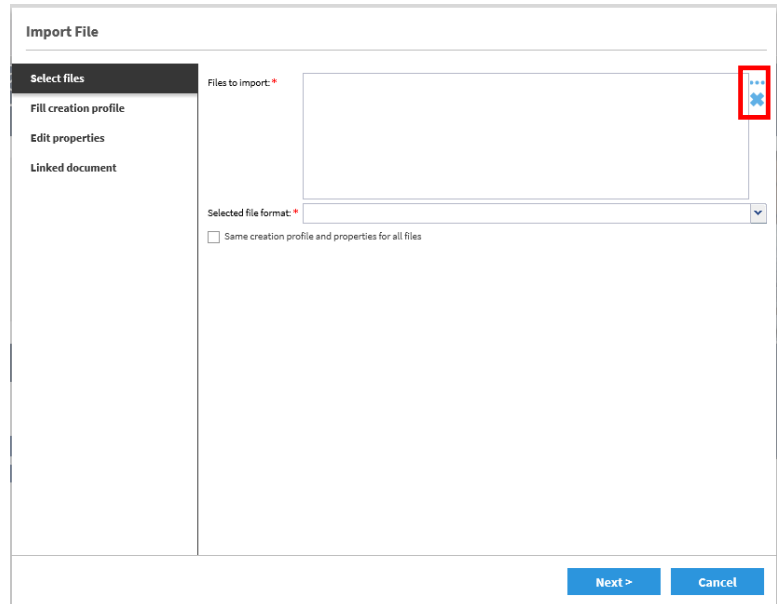
# Import a Document

Follow the steps below to import loan documents.

Steps	Additional Information/Results
<p>1. From the <i>Welcome</i> page, click on the <b>Loan Documents</b> tab to open the Loan Documents workspace.</p>	
<p>2. Click on <b>Import</b> on the top menu bar, then <b>File</b>.</p>	

Steps	Additional Information/Results
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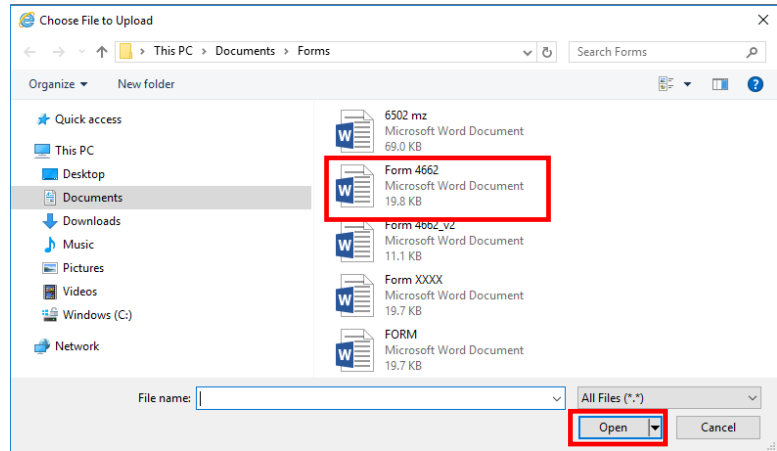
3. The *Import File* screen will open. Choose files to upload by clicking on the browse button (the ellipses "..."). The *Choose File to Upload* screen will open on your desktop allowing you to navigate to, and select, the appropriate file.



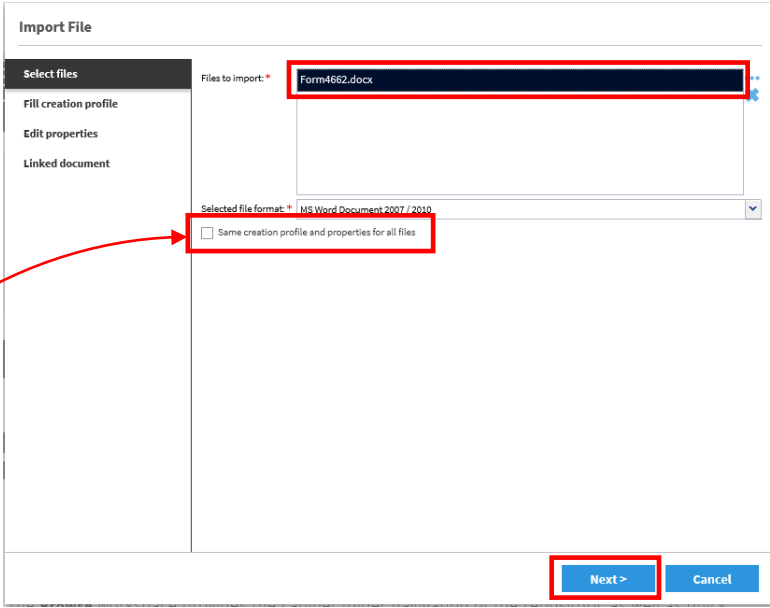
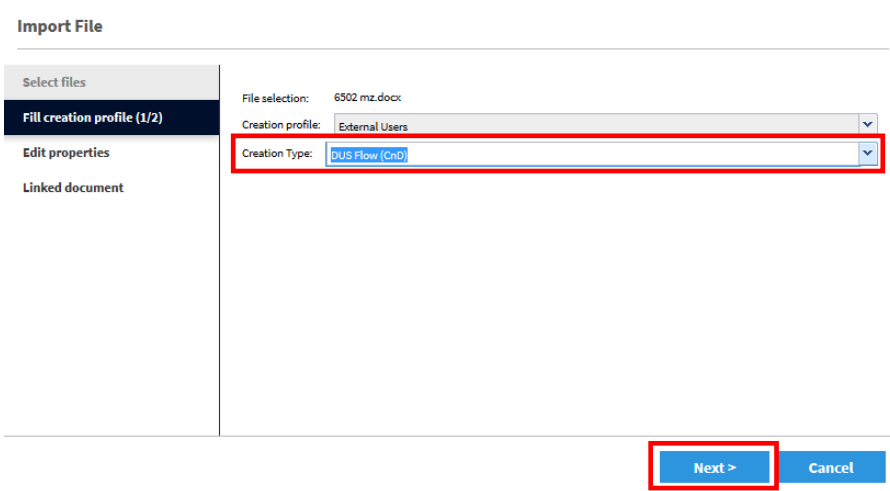
**Note:** Click on the X below the ellipses (...) with a file selected to delete the file from the list of files to import.

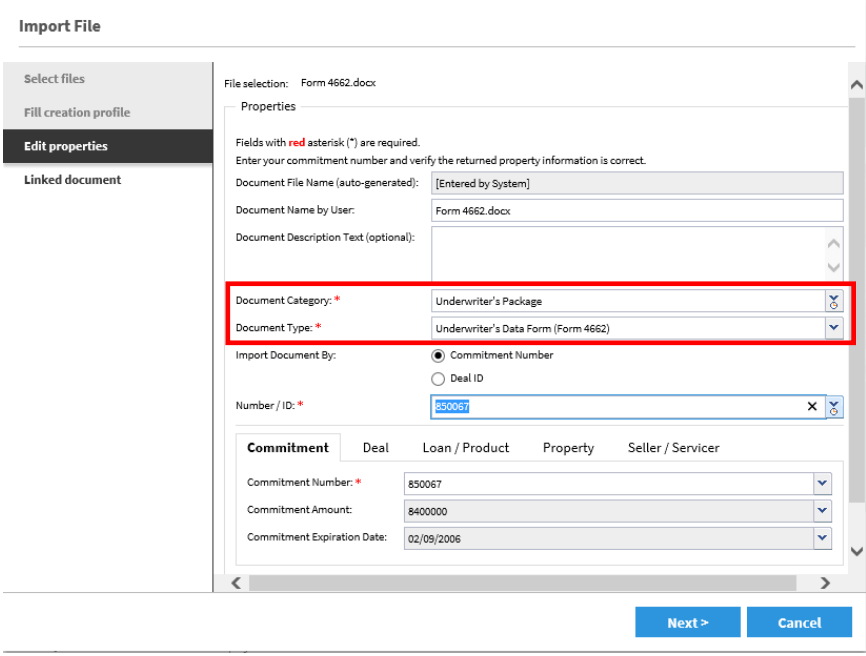
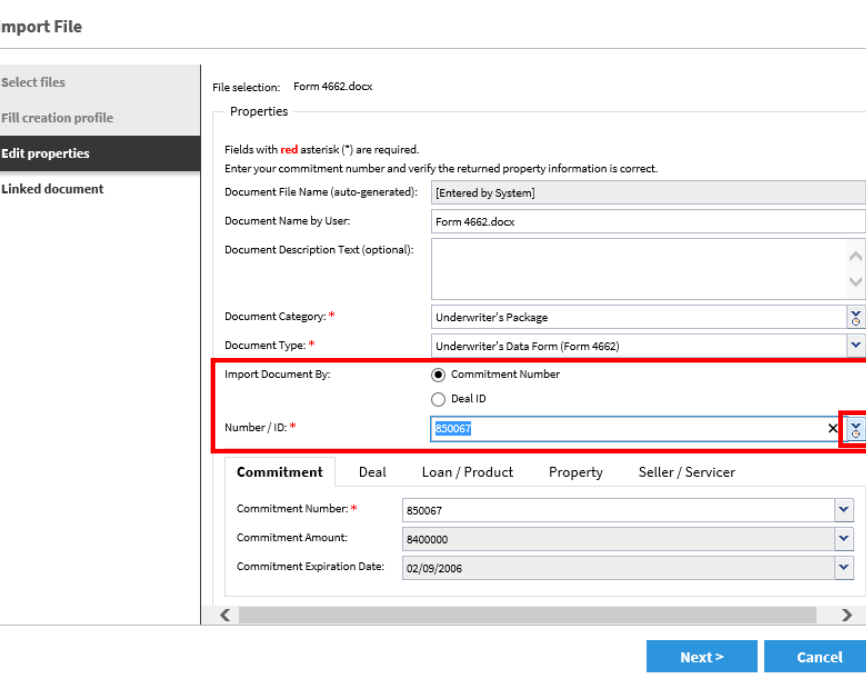
**Note:** You may also drag and drop files into the **Files to Import** box.

4. Click on the file or files you want to upload and click **Open**. The files will appear in the *Files to Import* list.

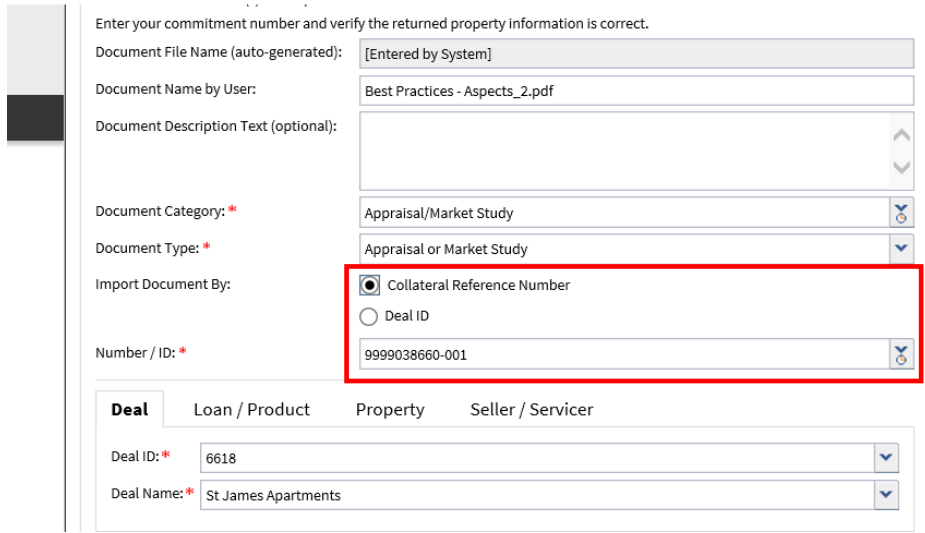

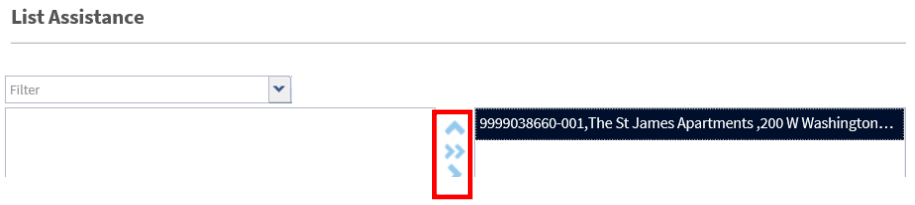


**Note:** Multiple files can be selected for upload by pressing the **Ctrl** button on your keyboard during file selection.

Steps	Additional Information/Results
<p>5. With the files you want to import shown, click <b>Next</b> to continue.</p>	 <p><b>Note:</b> When uploading multiple documents, you may select the <b>Same creation profile and properties for all files</b>. Using this checkbox will allow DUS DocWay to automatically upload all selected files. The files will be assigned the same properties, including <i>Document Category</i> and <i>Document Type</i>, however, <i>Properties</i> can be updated after the documents are uploaded as appropriate.</p>
<p>6. The <i>Fill Creation Profile</i> page will open. Select the appropriate <b>Creation Type</b> (either <i>DUS Flow [C&amp;D]</i> or <i>Structured Facilities [MSFMS]</i>) from the dropdown and click <b>Next</b>.</p>	

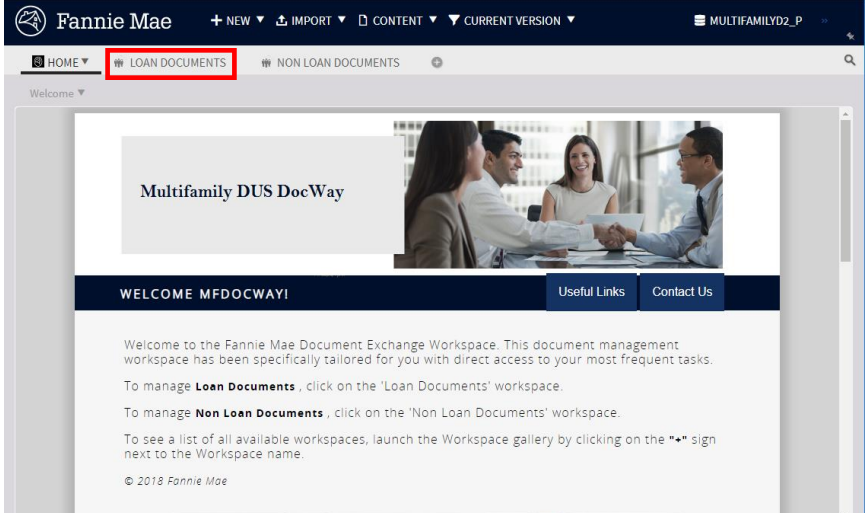
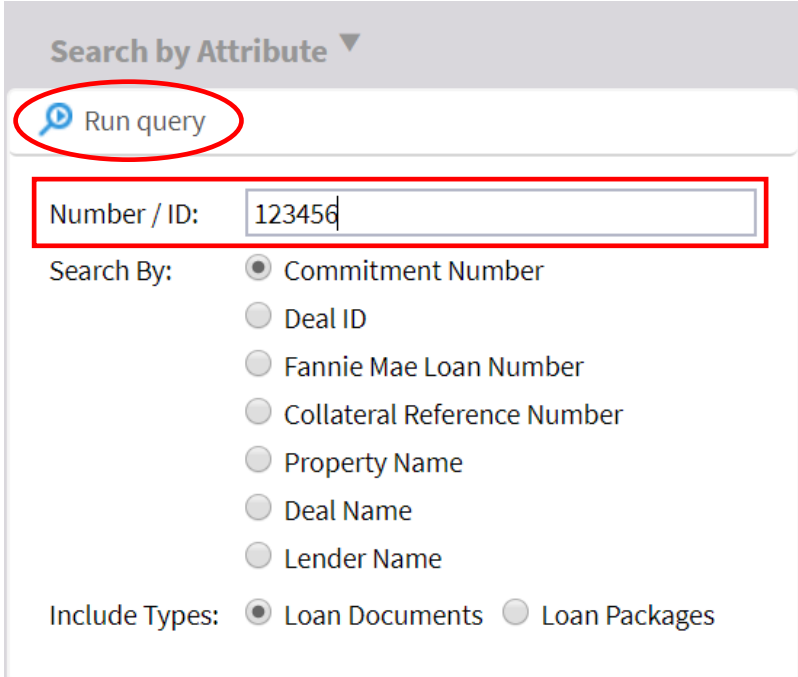
Steps	Additional Information/Results
<p>7. The <i>Edit Properties</i> screen will open. A red asterisk indicates a required field. Select <b>Document Category</b> and <b>Document Type</b> from the dropdown lists.</p>	 <p>The screenshot shows the 'Import File' interface with the 'Edit properties' tab active. The 'Document Category' dropdown is set to 'Underwriter's Package' and the 'Document Type' dropdown is set to 'Underwriter's Data Form (Form 4662)'. The 'Import Document By' section has 'Commitment Number' selected. The 'Number / ID' field contains '850067'. Below this, there are tabs for 'Commitment', 'Deal', 'Loan / Product', 'Property', and 'Seller / Servicer'. The 'Commitment' tab is active, showing fields for 'Commitment Number' (850067), 'Commitment Amount' (8400000), and 'Commitment Expiration Date' (02/09/2006). 'Next &gt;' and 'Cancel' buttons are at the bottom right.</p>
<p>8. If you are importing documents for a flow transaction (i.e., from C&amp;D), associate the imported document with the commitment number by selecting the <b>Commitment Number</b> radio button and then enter the commitment number in the <b>Number/ID</b> field. Finally, click on the dropdown to validate the number.</p>	 <p>This screenshot is similar to the previous one but highlights the 'Import Document By' section. The 'Commitment Number' radio button is selected. The 'Number / ID' field contains '850067' and a red box highlights the field and its dropdown arrow. The 'Deal ID' radio button is unselected. The rest of the interface, including the 'Commitment' tab and 'Next &gt;'/'Cancel' buttons, remains the same.</p> <p><b>Note:</b> For flow transactions (from C&amp;D), all documents must be associated with a commitment (as shown above); after you select the commitment number, the deal ID will be assigned automatically.</p> <p><b>Note:</b> The Property tab is not automatically populated. Step 10 below covers how to associate a property to the document.</p>

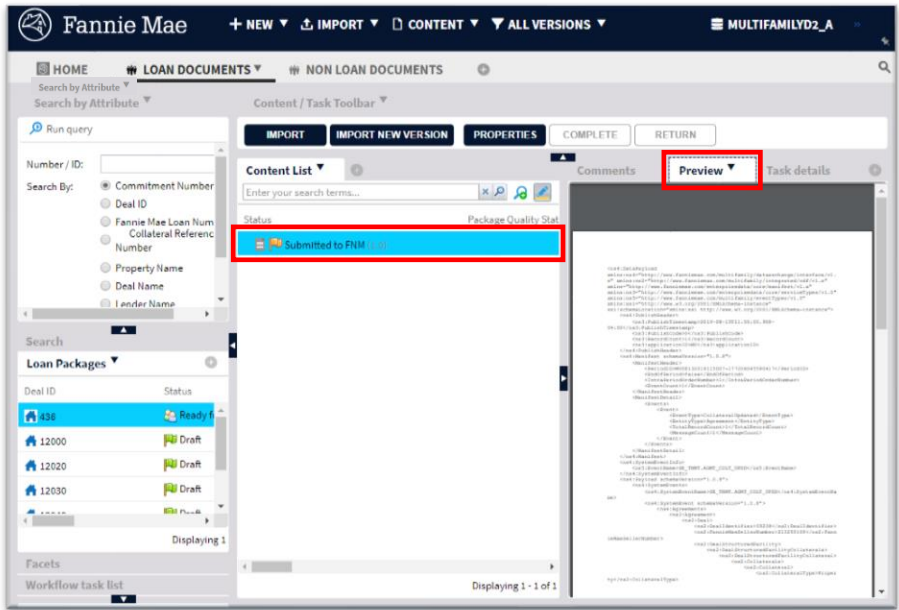


Steps	Additional Information/Results
<p>9. If you are importing documents for a structured facilities transaction (MSFMS), associate the imported document with the collateral reference number by selecting the <b>Collateral Reference Number</b> radio button and then entering the collateral reference number in the <b>Number/ID</b> field. Then, click on the dropdown to validate the number.</p>	 <p><b>Note:</b> For structured transactions (MSFMS), all documents must be associated to both a collateral reference number and a property. Best practice is to select the collateral reference number to which you want to associate your document first; the Deal ID will be automatically assigned. Then, assign the property by clicking on the <b>Property</b> tab and completing the form following the steps below.</p>
<p>10. If you are importing documents for a structured facilities transaction (MSFMS) <i>Property</i> is required (it's optional for flow transactions [C&amp;D]). Click on the <b>Property</b> tab to enter required property information.</p> <p>11. Click on the <b>Browse</b> button (i.e., the ellipses [...]) to bring up the <i>Property List</i>.</p>	
<p>12. On the <i>Property List</i>, click the propertie/s you wish to select and then use the blue arrows in the middle of the screen to move properties to the right side of the screen to select them.</p>	

## Preview a Document

To quickly view an uploaded PDF document or Microsoft Office document, you can generate a preview. Follow the steps below to preview a document:

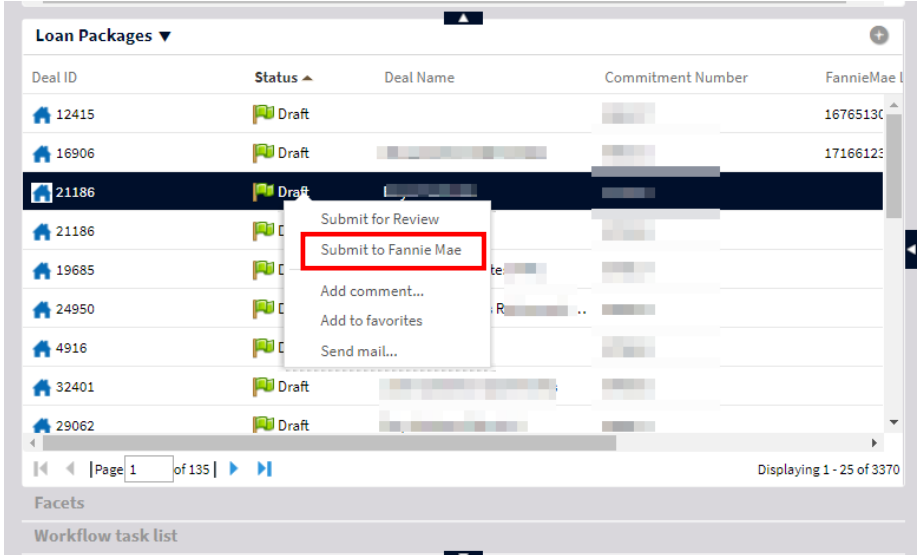
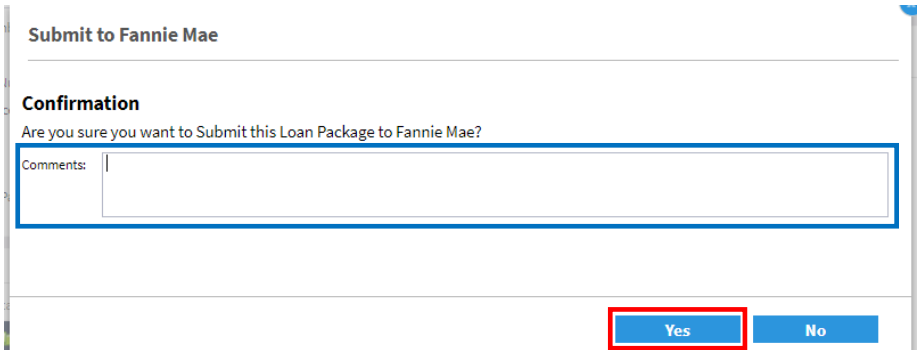
Steps	Additional Information/Results
<p>1. From the <i>Welcome</i> page, click on the <b>Loan Documents</b> tab.</p>	
<p>2. Search for the document to preview. Enter the <b>Number/ID</b> of the document you are searching for. Click <b>Run/Query</b>. All items matching the <i>Number/ID</i> entered will be displayed.</p>	

Steps	Additional Information/Results
<p>3. Select the document to preview by single-clicking on it.</p> <p>4. Click on the <b>Preview</b> tab (located next to the <i>Comments</i> tab to the right). A preview of the selected document will be displayed.</p>	 <p><b>Note:</b> Double click will open the document in a new window instead of allowing you to preview the document in the same browser window.</p>

# Submit a Loan Package with a Draft Status to Fannie Mae

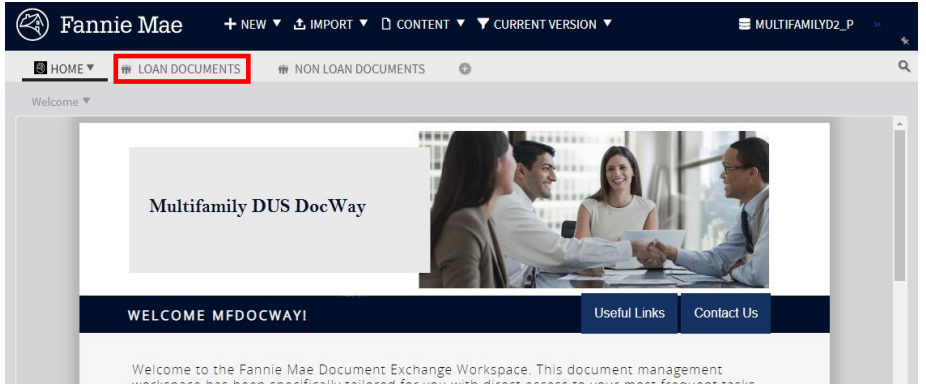
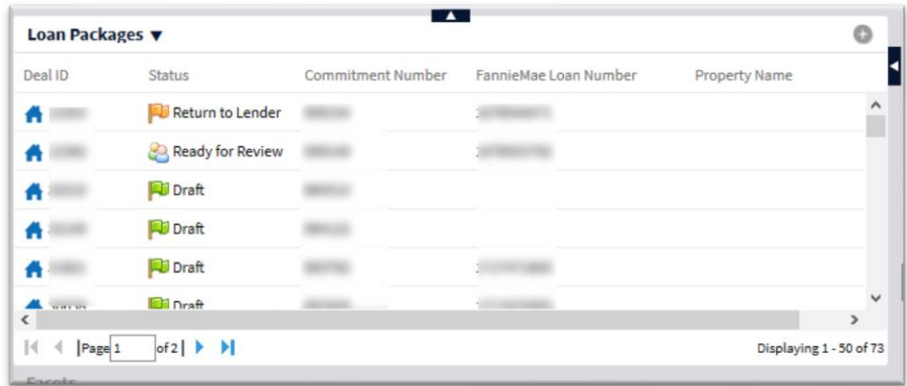
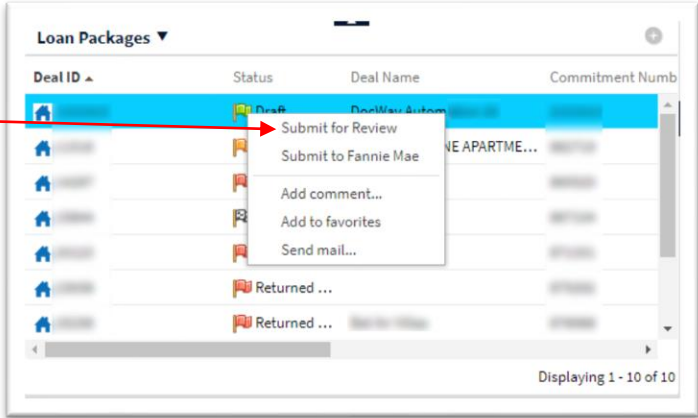
Both lender users and lender admins can either a) submit a loan package for internal review, or b) submit the loan package to Fannie Mae (without an internal review).

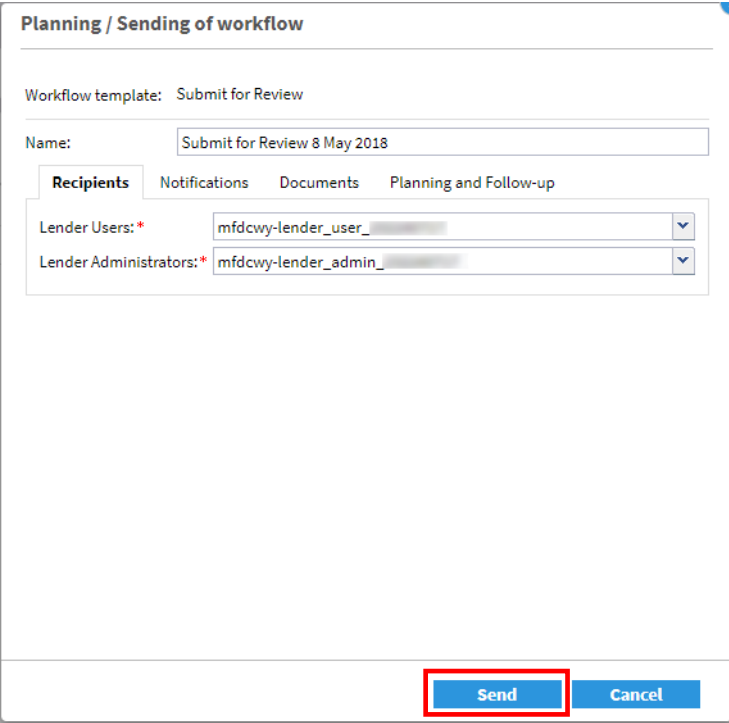
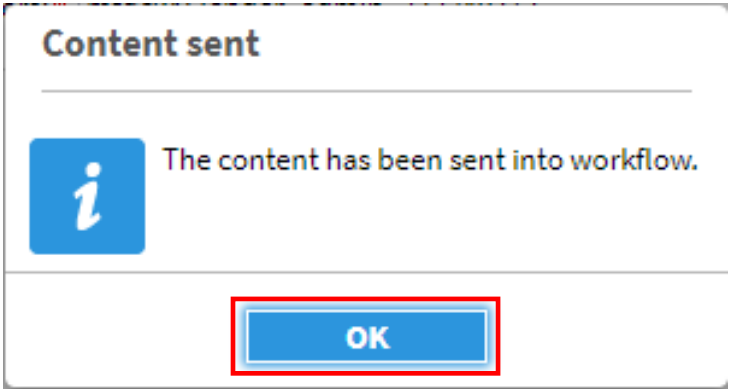
This section covers how to submit a DRAFT loan package to Fannie Mae directly (without completing an internal review).

Steps	Additional Information/Results
<p>1. Right click on the loan package in the <i>Loan Packages</i> window and select <b>Submit to Fannie Mae</b> from the dropdown menu.</p>	 <p>The screenshot shows a table of loan packages. The table has columns for Deal ID, Status, Deal Name, Commitment Number, and FannieMae ID. The status for all packages is 'Draft'. A right-click context menu is open over the package with Deal ID 21186. The menu options are: 'Submit for Review', 'Submit to Fannie Mae' (highlighted with a red box), 'Add comment...', 'Add to favorites', and 'Send mail...'. The table also shows pagination information: 'Page 1 of 135' and 'Displaying 1 - 25 of 3370'.</p>
<p>2. The confirmation box will appear. You may, <b>optionally</b>, enter comments for Fannie Mae reviewers here. When you are ready to submit, click <b>Yes</b>.</p>	 <p>The screenshot shows a confirmation dialog box titled 'Submit to Fannie Mae'. It contains a 'Confirmation' section with the question: 'Are you sure you want to Submit this Loan Package to Fannie Mae?'. Below the question is a text input field labeled 'Comments:'. At the bottom right of the dialog, there are two buttons: 'Yes' (highlighted with a red box) and 'No'.</p>

# Submit Loan Package for Internal Review

DUS DocWay workflow includes an option to submit a loan package for an internal review prior to its submission to Fannie Mae. All users (i.e., users with either the *Lender Administrator* or *Lender User* roles) can submit loan packages for review. Follow the steps below to submit a loan package for review.

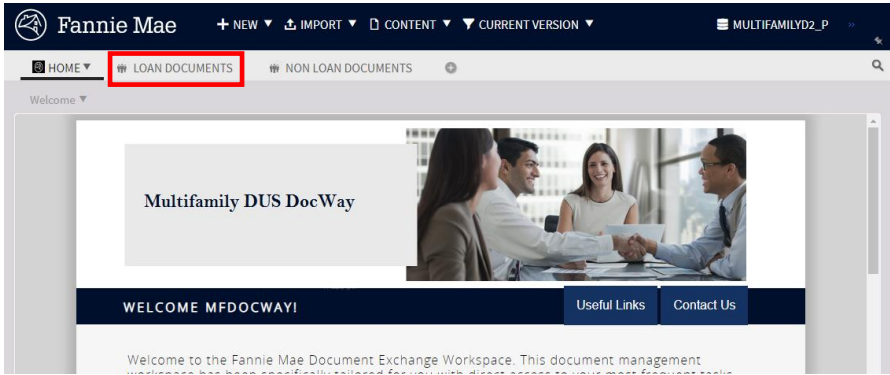
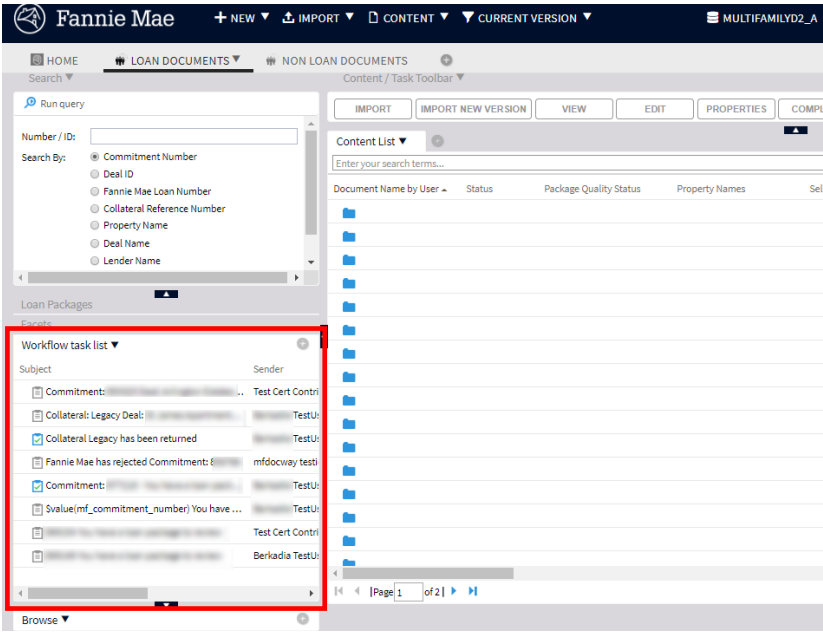
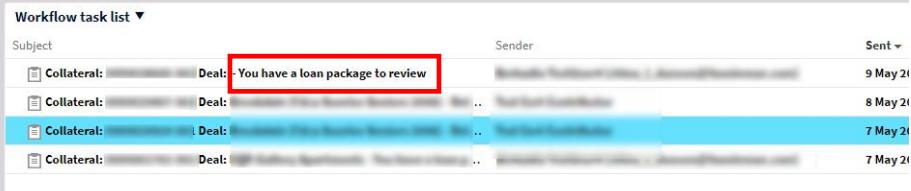
Steps	Additional Information/Results
<p>1. From the <i>Welcome</i> page, click on the <b>Loan Documents</b> tab to open the Loan Documents workspace.</p>	
<p>2. The <i>Loan Documents</i> workspace will open with loan packages listed in the window on the lower left of your screen.</p>	
<p>3. Right click on the appropriate package, then select <b>Submit for Review</b> from the dropdown menu.</p>	 <p><b>Note:</b> Loan packages in Draft status can be sent for internal review.</p>

Steps	Additional Information/Results
<p>4. If you are assigned the <i>Lender User</i> role, the Lender Administrator group will be automatically selected as the reviewer. If you are assigned the <i>Lender Administrator</i> role, select <b>mfdcwylender_admin_*</b> in both drop down selections. All users in your organization who are assigned the <i>Lender Administrator</i> role will receive the loan package for review. Click <b>Send</b>.</p>	
<p>5. A message will be displayed which indicates that the loan package has been sent for review. Click <b>OK</b> to close the message.</p>	

# Conduct Internal Review of a Loan Package

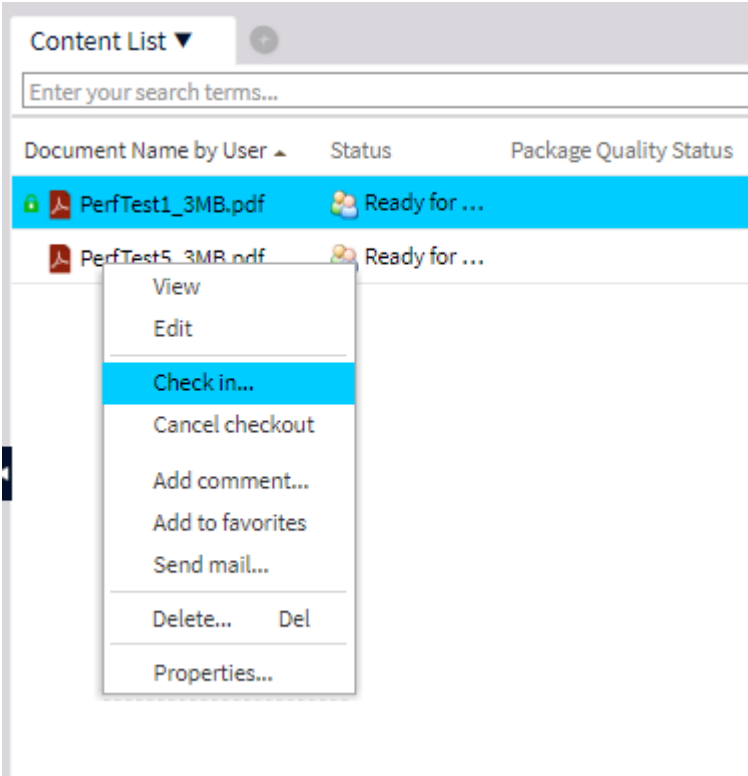
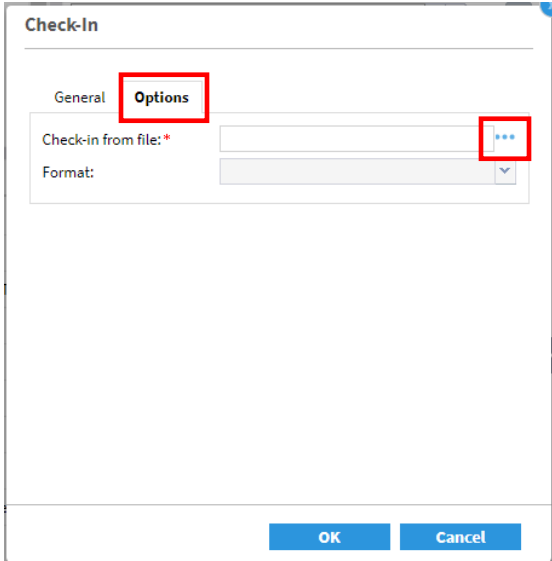
A loan package may be reviewed internally (this review is optional). When the review is complete, the reviewer can either return the package to the user who created it to make changes, or they can submit it to Fannie Mae. Users assigned the *Lender Admin* role will receive an email notification whenever there is a loan package ready for review, and they will also receive a notification in their *Workflow Task List*.

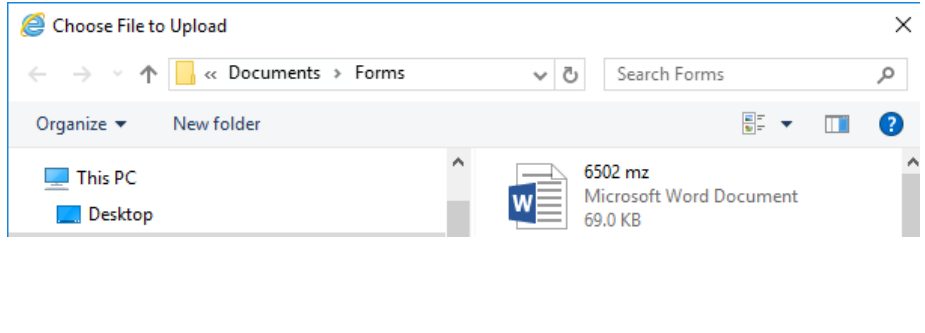
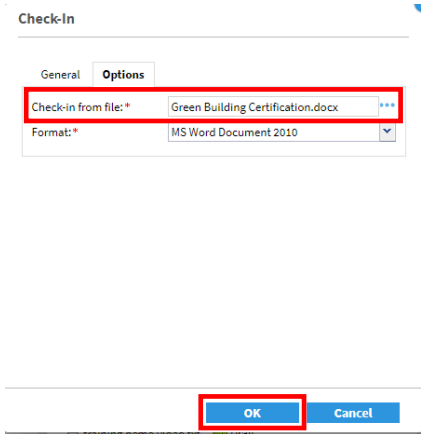
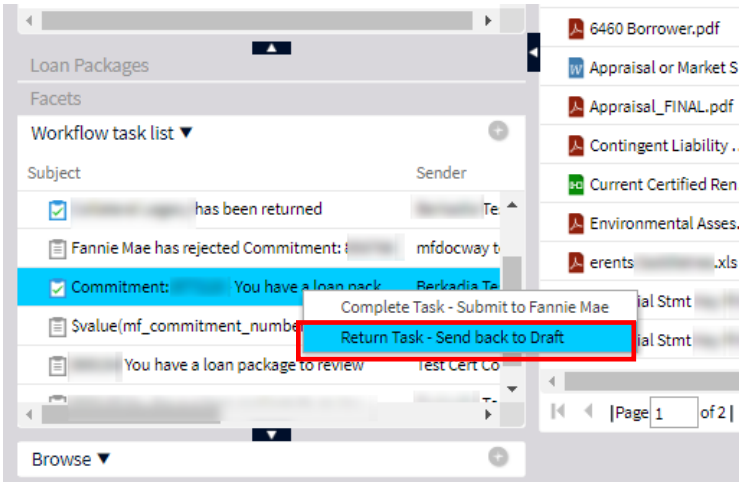
Follow the steps below to conduct an internal review of a loan package.

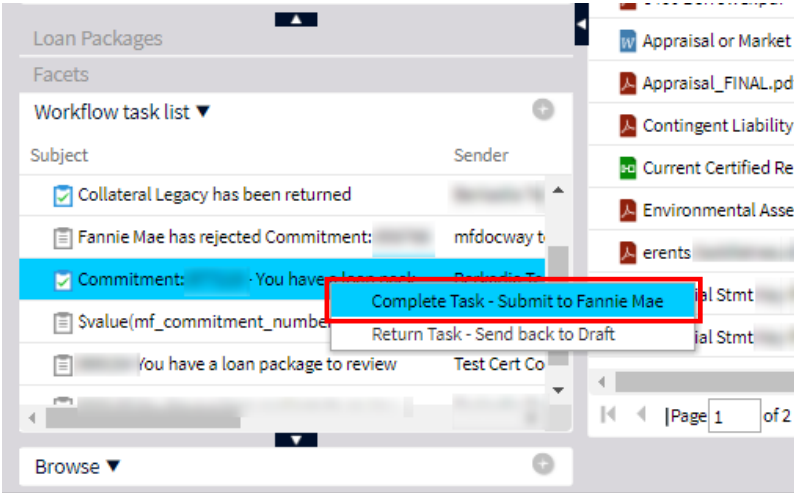
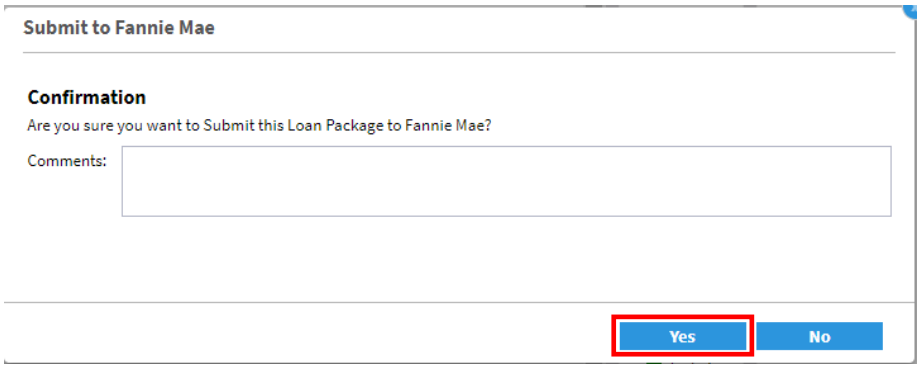
Steps	Additional Information/Results
<ol style="list-style-type: none"> <li>1. If you receive an email notification that you have tasks to complete, the message will include a link to DUS DocWay.</li> <li>2. Click on the link and log in.</li> <li>3. Click <b>Loan Documents</b> on the <i>Welcome</i> page. The <i>Loan Documents</i> workspace will open.</li> </ol>	
<ol style="list-style-type: none"> <li>4. The <i>Workflow Task List</i> may already be open at the bottom left of the screen. If not, click on the <b>Workflow Task List</b> tab at the bottom left of the screen to open it.</li> </ol>	
<ol style="list-style-type: none"> <li>5. The list will include all loan packages with a status of <i>Ready for Review</i>. They are shown with the label, <i>You have a loan package to review</i>.</li> </ol>	

Steps	Additional Information/Results
<p>6. To select a loan package to review, right click on the loan package, then click on <b>Acquire task</b>.</p>	<p>The screenshot shows a 'Workflow task list' with columns for Subject and Sender. A right-click context menu is open over a task, and the 'Acquire task' option is highlighted with a red box.</p>
<p>7. The documents associated with the loan package will now display in the <i>Content List</i>. If a document requires an update, right click on it and select <b>Edit</b> from the dropdown.</p>	<p>The screenshot shows a 'Content List' table with columns for Document Name by User, Status, Property Names, and Seller Name. A right-click context menu is open over a row, and the 'Edit' option is highlighted with a red box.</p>
<p>8. When you select <b>Edit</b>, you will see a popup at the bottom of the screen. Click on the popup to open the document and edit it. When you are finished with your edits, save the file.</p>	<p>The screenshot shows a 'Loan Packages' popup window with columns for Deal ID, Status, and Deal Name. At the bottom of the popup, a document titled 'Delivery Documenten...xlsx' is highlighted with a red box.</p>



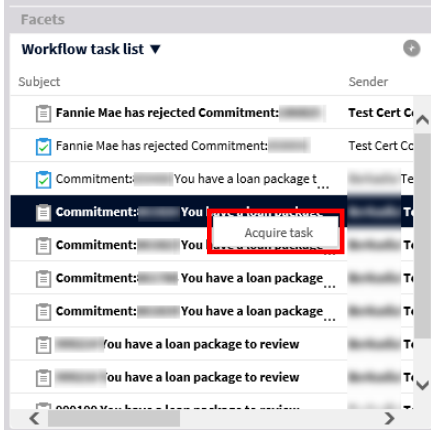
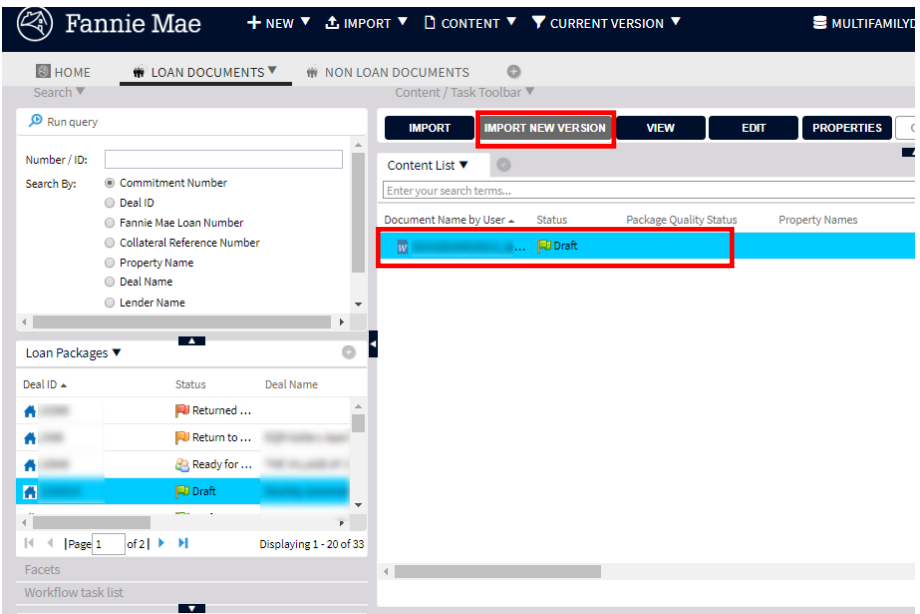
Steps	Additional Information/Results
<p>9. To import the revised version of the document, highlight the document in the <i>Content List</i>, right click and select <b>Check In</b>.</p>	 <p>The screenshot shows a 'Content List' window with a search bar and columns for 'Document Name by User', 'Status', and 'Package Quality Status'. Two documents are listed: 'PerfTest1_3MB.pdf' and 'PerfTest5_3MB.pdf', both with a status of 'Ready for ...'. A right-click context menu is open over the first document, with 'Check in...' highlighted in blue. Other menu items include View, Edit, Cancel checkout, Add comment..., Add to favorites, Send mail..., Delete... Del, and Properties...</p>
<p>10. The <i>Check-In</i> window will open. Click on the <b>Options</b> tab and select the <b>browse</b> button (i.e., the ellipses [...]).</p>	 <p>The screenshot shows a 'Check-In' dialog box with two tabs: 'General' and 'Options'. The 'Options' tab is selected and highlighted with a red box. Below the tabs, there is a 'Check-in from file:' field with a red box around the browse button (three dots). A 'Format:' dropdown menu is also visible. At the bottom, there are 'OK' and 'Cancel' buttons.</p> <p><b>Note:</b> No changes are required on the <b>General</b> tab.</p>

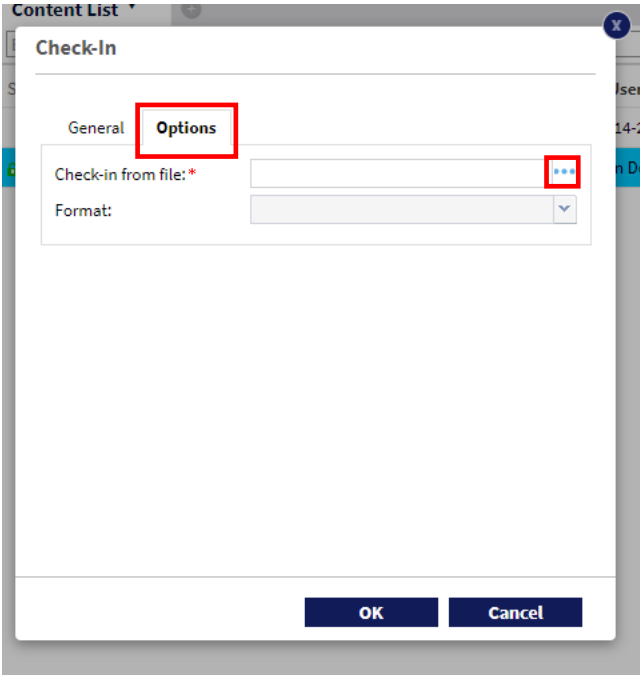
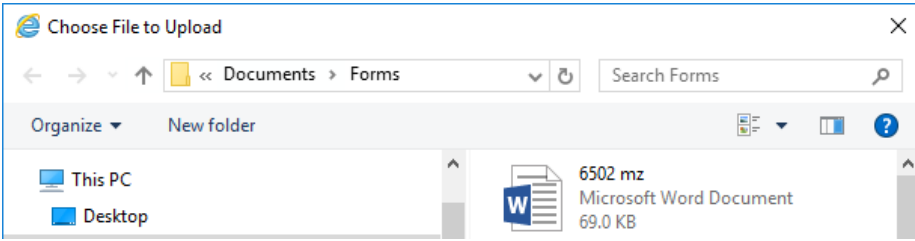
Steps	Additional Information/Results
<p>11. The <i>Choose File to Upload</i> window will open. Select the document to be imported (i.e., the new version of the document) by clicking on it, then click on <b>OK</b> to upload it.</p>	
<p>12. The selected document will now be listed in the <i>Check-in from file</i> field.</p> <p>13. Click <b>OK</b>. The document will be imported into DUS DocWay.</p>	
<p>14. (Optional step) To return a loan package for correction, right click on it in the <i>Workflow Task List</i> and select <b>Return Task – Send back to Draft</b>.</p>	

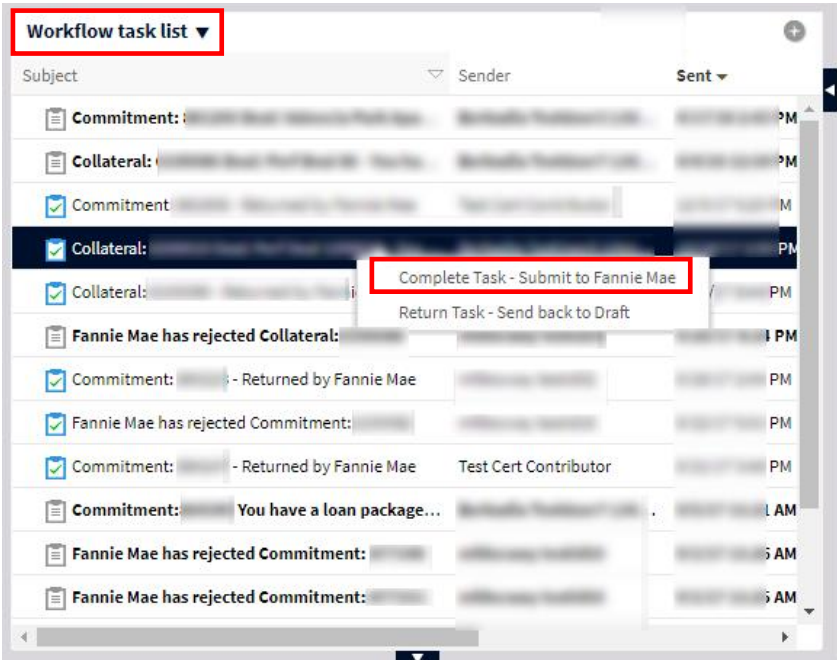
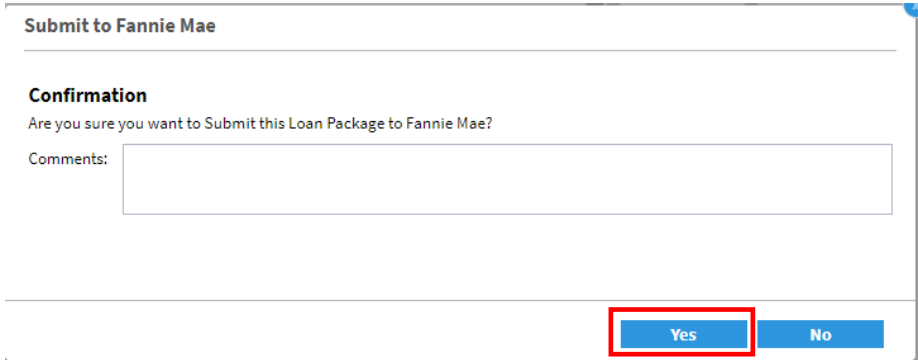
Steps	Additional Information/Results
<p>15. (Optional step) To submit the loan package to Fannie Mae, right click on it and select <b>Complete Task – Submit to Fannie Mae</b>.</p>	 <p>The screenshot shows a 'Loan Packages' interface with a 'Workflow task list' table. The table has columns for 'Subject' and 'Sender'. One task is highlighted in blue: 'Commitment: [redacted] - You have [redacted]'. A right-click context menu is open over this task, showing options: 'Complete Task - Submit to Fannie Mae' (highlighted in a red box), 'Return Task - Send back to Draft', and 'Return Task - Send back to Draft'. The interface also shows a 'Facets' sidebar on the right with various document types like 'Appraisal or Market', 'Appraisal_FINAL.pdf', 'Contingent Liability', 'Current Certified Re...', 'Environmental Asse...', and 'Events [redacted]'. At the bottom, there is a 'Browse' button and a page indicator 'Page 1 of 2'.</p>
<p>16. (Optional step) Enter comments for Fannie Mae reviewers.</p> <p>17. Click <b>Yes</b> to submit the loan package to Fannie Mae.</p>	 <p>The screenshot shows a 'Submit to Fannie Mae' confirmation dialog. It has a title bar 'Submit to Fannie Mae' and a 'Confirmation' section. The text reads: 'Are you sure you want to Submit this Loan Package to Fannie Mae?'. Below this is a 'Comments:' label followed by a text input area. At the bottom right, there are two buttons: 'Yes' (highlighted in a red box) and 'No'.</p>

# Review Loan Package Returned by Fannie Mae

This section of the Guide provides instructions for reviewing a loan package that was previously submitted to Fannie Mae and returned for correction. Follow the steps below to update documents and resubmit to Fannie Mae.

Steps	Additional Information/Results
<p>1. From the <i>Workflow Task List</i>, right click on the task, then click on <b>Acquire Task</b>.</p>	 <p><b>Note:</b> After you click on <b>Acquire Task</b> you will be able to import new documents or revise existing documents. Follow the steps in <i>Import a Document</i> in this Guide for instructions on how to import a document.</p>
<p>2. To revise or replace a document you will import a new version. Click on the document you want to replace, then click on the <b>Import New Version</b> button.</p>	

Steps	Additional Information/Results
<p>3. The <i>Check-In</i> window will open. Click on the <b>Options</b> tab.</p> <p>Click on the <b>Browse</b> button (the ellipses [...]) to continue.</p>	
<p>4. The <i>Choose File to Upload</i> window will open. Select the document to be imported by clicking on it, then click on <b>OK</b> to upload it.</p> <p>Repeat steps 2, 3 and 4 as required to replace additional documents.</p> <p>When all document modifications are complete, continue to Step 5.</p>	

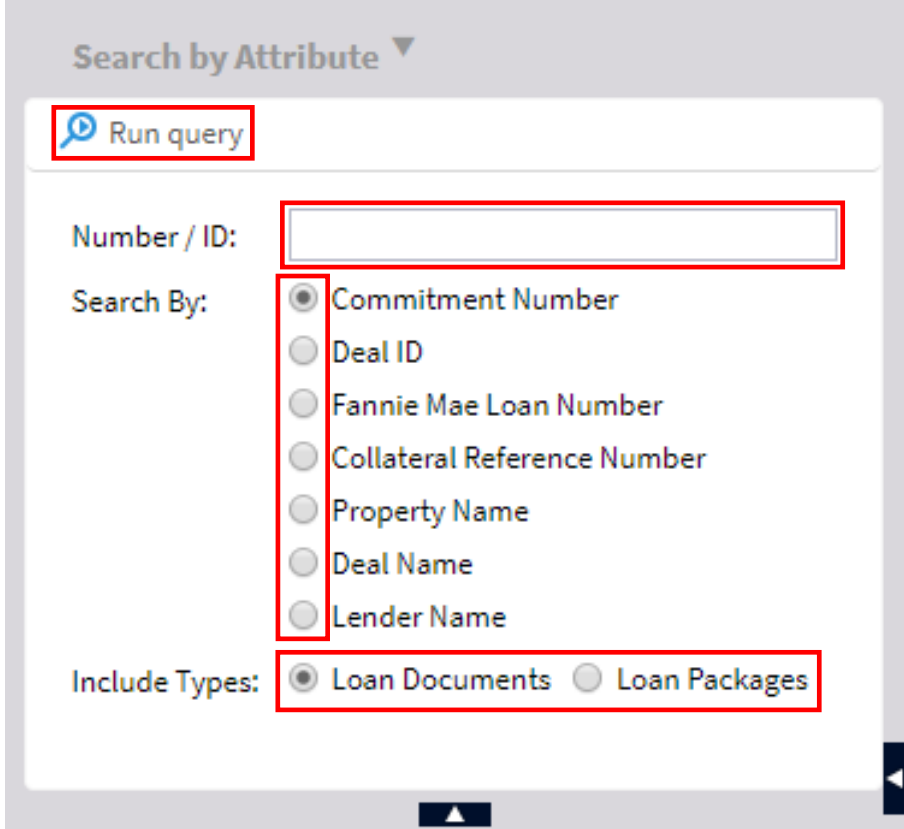
Steps	Additional Information/Results
<p>5. When the loan package is updated and you are ready to submit it to Fannie Mae, in the <i>Workflow Task List</i>, right click on the task and select <b>Complete Task – Submit to Fannie Mae</b> from the dropdown menu.</p>	
<p>6. Add comments for Fannie Mae.</p> <p>7. Click <b>Yes</b> to submit.</p>	 <p><b>Note:</b> This required step sends the task back to Fannie Mae and notifies them that the requested revisions have been made.</p>

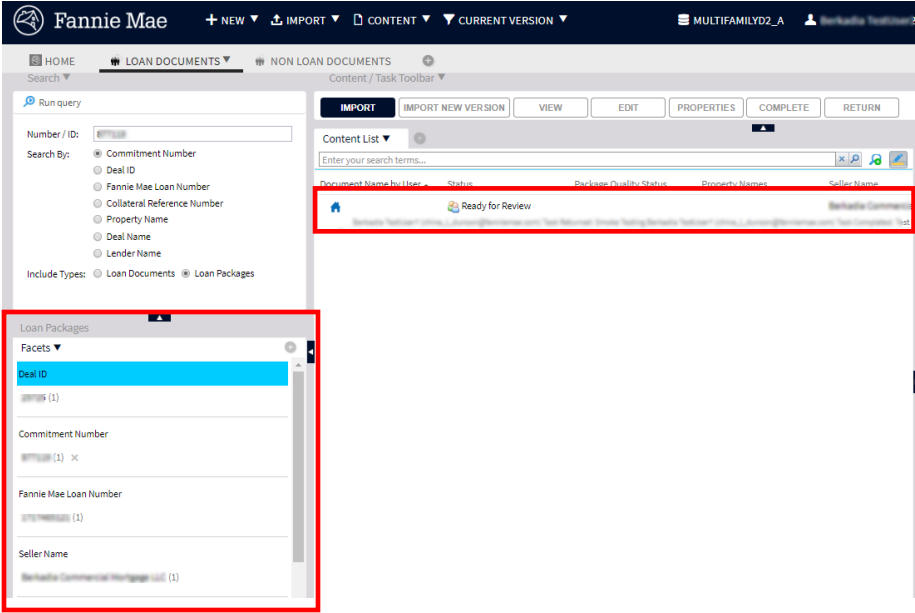
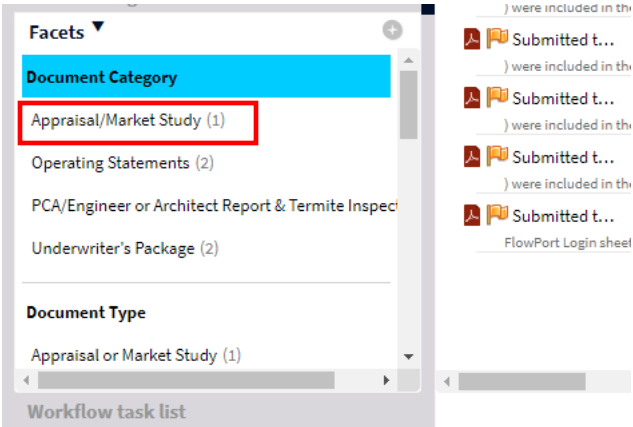
## Searching for a Document

This section will cover:

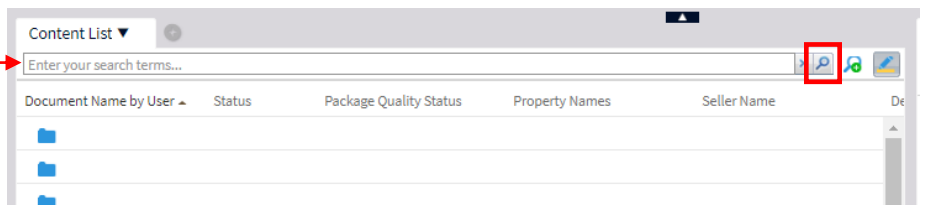
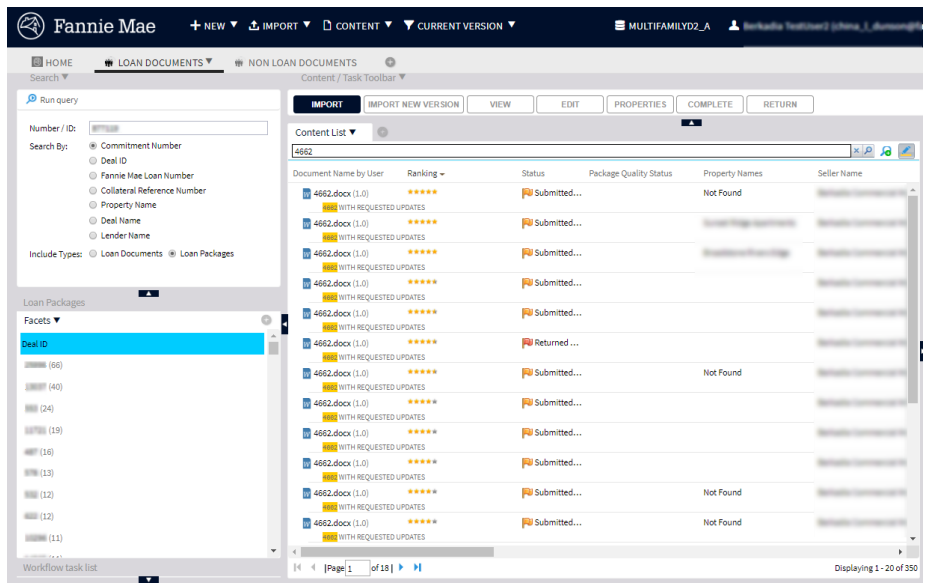
- **Search by Attribute** which allows you to quickly find documents with certain specified attributes.
- **Basic Search** allows you to search the content of documents for a specified term or terms.

Follow the steps below to perform both types of searches.

Steps	Additional Information/Results
<ol style="list-style-type: none"> <li>1. To conduct a search by attribute, begin at the bottom of the <i>Search by Attribute</i> window: Select either <b>Loan Documents</b> or <b>Loan Packages</b>.</li> <li>2. Select <b>Search By</b> criteria (i.e., commitment number, deal ID, etc.)</li> <li>3. Enter the <b>Number ID</b> field.</li> <li>4. Click <b>Run/Query</b> at the top of the <i>Search by Attribute</i> window.</li> </ol>	 <p><b>Note:</b> Advanced search functionality is a third available search option. It allows you to build a customized search query using a range of search criteria and facets. For assistance using the advanced search feature, email DUS <a href="mailto:DocWay_Support@FannieMae.com">DocWay_Support@FannieMae.com</a>.</p>

Steps	Additional Information/Results
<p>5. If you selected <i>Loan Packages</i>, the loan package will be listed in the <i>Content List</i>. Double click on the loan package listing to display the documents in the loan package. (If you selected <i>Loan Documents</i>, the loan documents would be displayed.)</p>	 <p><b>Note:</b> <i>Facets</i> are displayed on the left allowing you to see a breakdown of search results and count by <b>Deal ID, Commitment Number, Fannie Mae Loan Number, Document Category, Document Type, Property Collateral, and Deal Name</b>. For each <i>Facet</i>, you will see a number in parentheses displayed after the item that represents the total number of documents meeting the search criteria associated with the <i>Facet</i> shown.</p>  <p><b>Note:</b> In <i>Facets</i>, the facet filters are links that allow you to quickly display the related document/s (e.g., click on “Appraisal/Market Study” to display all documents that have a Document Category of “Appraisal/Market Study”). To return to the full list, click on the X next to the facet filter.</p>

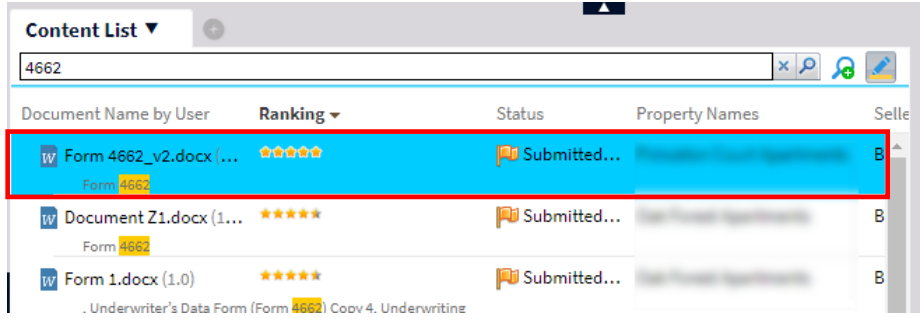
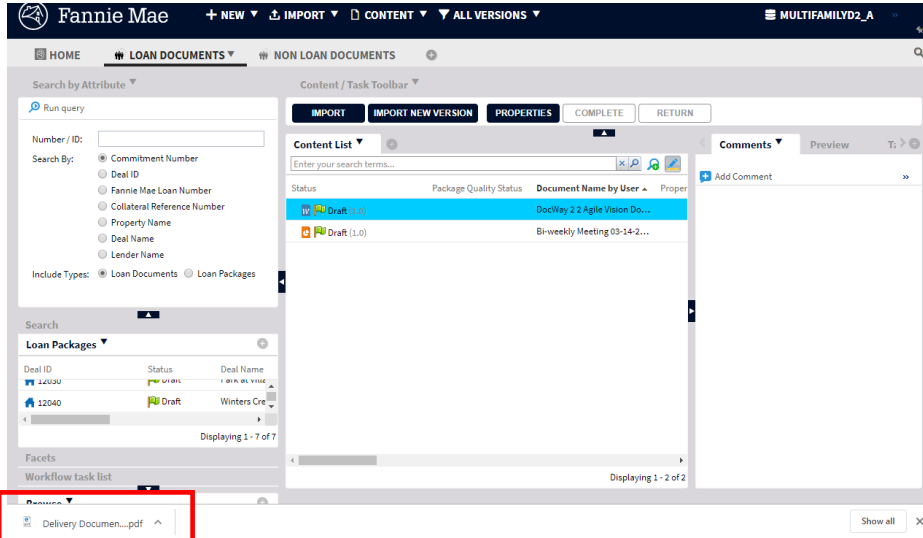


Steps	Additional Information/Results
<p>6. To complete a <i>Basic Search</i>, enter search terms in the search bar in the <i>Content List</i> window, and then click on the small <b>magnifying glass icon</b> on the right side of the search bar.</p>	 <p><b>Note:</b> Search terms may consist of either alpha or numeric entries, and may include multiple terms. The results when multiple terms are used will include all documents that contain any of the search terms unless you use a “+” between the two terms. If you use the “+” sign between search terms, only documents containing both search terms will be returned.</p> <p><b>Note:</b> “*” functions as a wildcard (e.g., enter “*” before some part of the desired search term and all items matching the portion of the search term entered will be returned. Enter the “*” after a portion of a search term and all items beginning with the portion of the search term entered will be returned).</p>
<p>7. Search results will be displayed.</p>	

## Exporting a Document

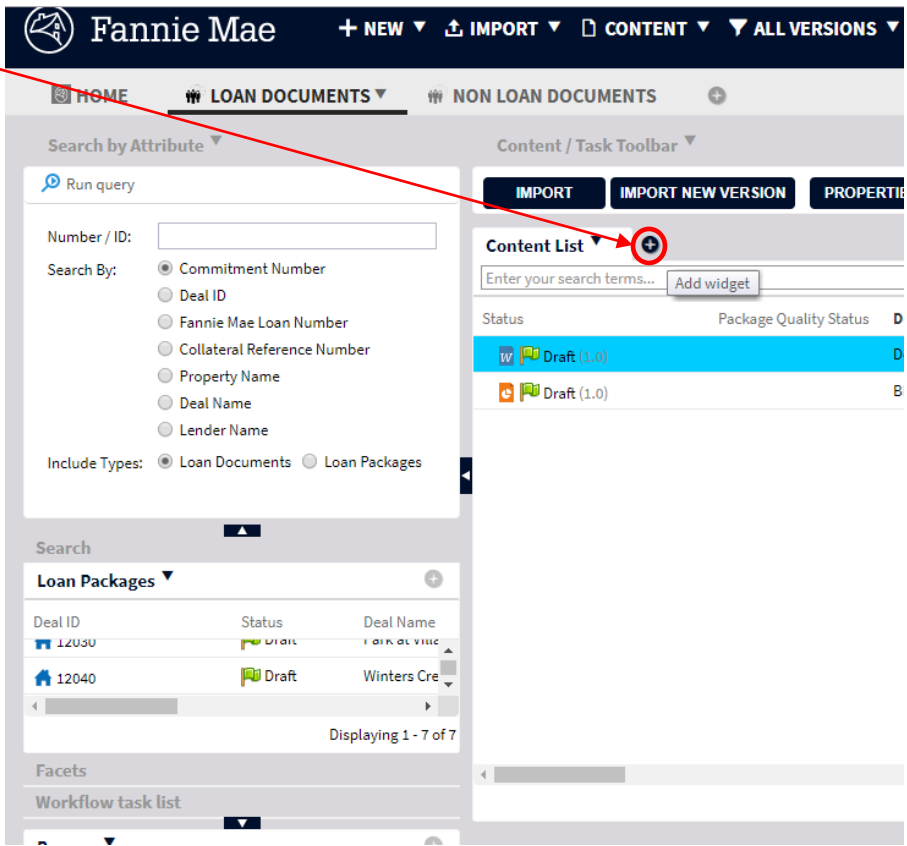
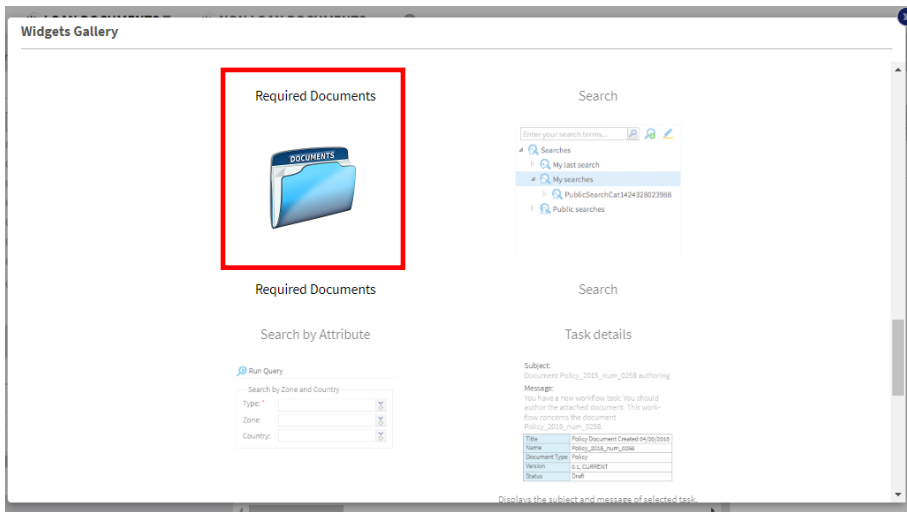
To export a document from DUS DocWay, you begin by searching for and displaying the document in the **Content List** in the *Loan Documents Workspace*. If you need assistance with how to search for a document, refer to the section of this Guide titled *Search for a Document*.

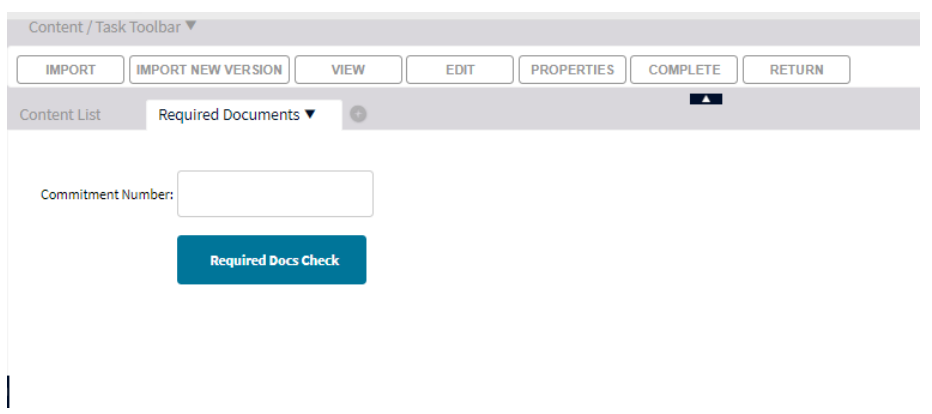
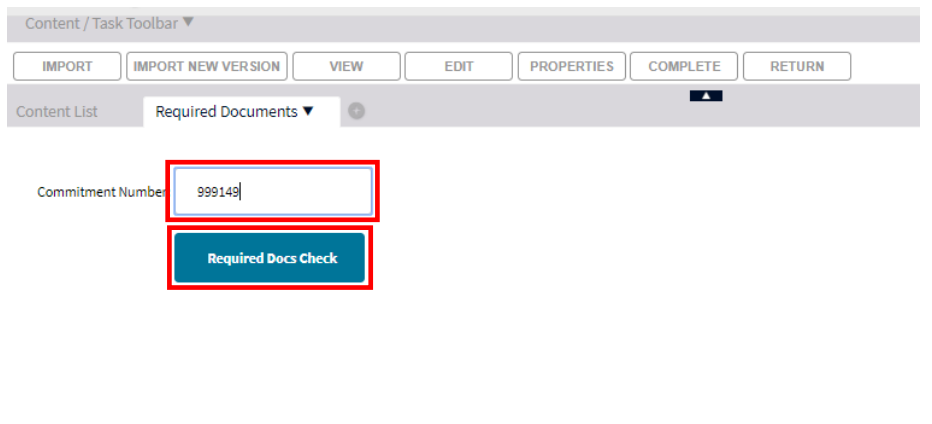
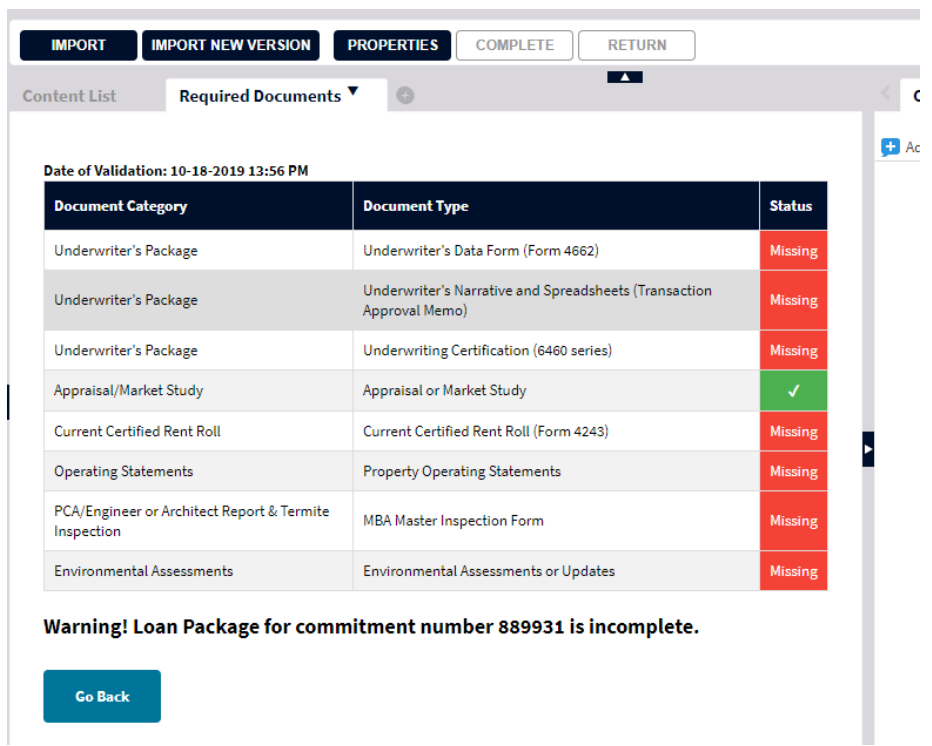
You may export documents from DUS DocWay by following the steps below.

Steps	Additional Information/Results
<p>1. In the <i>Content List</i>, double (left) click on the document you want to export.</p>	
<p>2. The selected document will be downloaded. To open the document, click on the popup at the bottom of your screen. After the document opens, you may save it to a location of your choosing.</p>	

# Check a Loan Package for Completeness

To check a loan package for completeness, you can install and use a widget which will provide a report of the contents of a specified commitment's loan package. The check provides a listing of core required documents (documents required for all loan packages) and clearly identifies which documents are missing, if any. Follow the steps below to check a loan package for completeness:

Steps	Additional Information/Results
<p>1. Next to the <i>Content List</i> tab, click on the plus (“+”) sign to open the Widgets Gallery.</p>	
<p>2. When the <i>Widgets Gallery</i> opens, scroll down and click on the <b>Required Documents</b> widget.</p>	

<p>3. The <i>Required Documents</i> widget will appear.</p>																												
<p>4. Enter the commitment number for the loan package you want to check for completeness.</p> <p>5. Click on the <b>Required Docs Check</b> button.</p>																												
<p>6. The <i>Required Documents</i> listing will display documents that are included in the package with a checkmark (“√”) in a green box next to them; missing documents are shown with the word “Missing” in a red box.</p>	 <table border="1" data-bbox="621 1213 1401 1623"> <thead> <tr> <th>Document Category</th> <th>Document Type</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Underwriter's Package</td> <td>Underwriter's Data Form (Form 4662)</td> <td>Missing</td> </tr> <tr> <td>Underwriter's Package</td> <td>Underwriter's Narrative and Spreadsheets (Transaction Approval Memo)</td> <td>Missing</td> </tr> <tr> <td>Underwriter's Package</td> <td>Underwriting Certification (6460 series)</td> <td>Missing</td> </tr> <tr> <td>Appraisal/Market Study</td> <td>Appraisal or Market Study</td> <td>✓</td> </tr> <tr> <td>Current Certified Rent Roll</td> <td>Current Certified Rent Roll (Form 4243)</td> <td>Missing</td> </tr> <tr> <td>Operating Statements</td> <td>Property Operating Statements</td> <td>Missing</td> </tr> <tr> <td>PCA/Engineer or Architect Report &amp; Termite Inspection</td> <td>MBA Master Inspection Form</td> <td>Missing</td> </tr> <tr> <td>Environmental Assessments</td> <td>Environmental Assessments or Updates</td> <td>Missing</td> </tr> </tbody> </table> <p><b>Warning! Loan Package for commitment number 889931 is incomplete.</b></p> <p><a href="#">Go Back</a></p>	Document Category	Document Type	Status	Underwriter's Package	Underwriter's Data Form (Form 4662)	Missing	Underwriter's Package	Underwriter's Narrative and Spreadsheets (Transaction Approval Memo)	Missing	Underwriter's Package	Underwriting Certification (6460 series)	Missing	Appraisal/Market Study	Appraisal or Market Study	✓	Current Certified Rent Roll	Current Certified Rent Roll (Form 4243)	Missing	Operating Statements	Property Operating Statements	Missing	PCA/Engineer or Architect Report & Termite Inspection	MBA Master Inspection Form	Missing	Environmental Assessments	Environmental Assessments or Updates	Missing
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## Questions?

If you need assistance with DUS DocWay, would like to request training, or have a question, please email us at [DUSDocWay\\_Support@fanniemae.com](mailto:DUSDocWay_Support@fanniemae.com).