

# BlitzDocs Instructions

## Accessing BlitzDocs

- Log in to PHFA Pipeline Plus, and select **BlitzDocs** from your menu; click link to launch BlitzDocs in a new window. *(This will be the same for every person using BlitzDocs.)*
- You will continue to use PHFA Pipeline Plus to check the status and view conditions on a loan.
- File size is limited to **50MB**. If your file is larger than 50MB, you will have to break it down and upload two different documents.
- PHFA will be sure that each person with an existing Pipeline Plus account will have a corresponding BlitzDocs account. It will be up to those with administrative authority at each lender to give the BlitzDocs menu option to those users that will be submitting any portion of a file to PHFA.
- When creating a new Pipeline Plus account for an employee that needs access to BlitzDocs, the administrator must reach out to PHFA via email to [lenders@phfa.org](mailto:lenders@phfa.org) and we will contact BlitzDocs to obtain login information. *(This may take approximately 48 hours for newly created accounts.)*
- When a compliance package is submitted via BlitzDocs the purchase package must also be submitted via BlitzDocs.
- When completing any of the File Submission steps, you will be asked to select the “Submission Contact”. This will determine who receives the submission confirmation email from BlitzDocs and can be different for each submission. This contact will also be the person that then receives the submission email from BlitzDocs.

**NOTE:** PHFA Employee files cannot be sent via BlitzDocs. The paper file must continue to be sent directly to PHFA in an envelope marked “Personal and Confidential”. Compliance Package – Attention: Tammy Miller; Purchase Package – Karen Zapotosky

## Submitting New Compliance Package

1. Create a new folder: **Folder >> Create a Folder**; Complete required fields and click the **Create** button in the bottom left corner of the screen.
  - a. Only create a folder when ready to submit a complete compliance package.
  - b. Do not create multiple folders for the same borrower.

**NOTE:** When completing the Folder Attributes, be sure to enter the PHFA Loan Number listed on the Reservation Confirmation or in PHFA Pipeline Plus.

When submitting an HFA Manually Underwritten loan, under the “Automated Underwriting System” drop down box, you must select “Manual Underwrite”. This would be required even if you had run it through an AUS system.



# BlitzDocs Instructions

## Submitting New Compliance Package (continued)

[Folders >>](#)
[User >>](#)
[Documents >>](#)
[eShip >>](#)
[Batch Processing >>](#)
[Reports](#)
[Administration](#)
[Help](#)

**Folder Attributes**

PHFA Loan Number	*	<input type="text"/>
Borrower First Name	*	<input type="text"/>
Borrower Last Name	*	<input type="text"/>
Status		Pending Submission to PHFA
Product Type	*	<input type="text"/>
Loan Type	*	<input type="text"/>
Loan Purpose	*	<input type="text"/>
Automated Underwriting System	*	<input type="text"/>
PHFA Delegated Loan	*	<input type="text"/>
Mortgage Credit Certificate	*	<input type="text"/>
Lender Company Name	*	<input type="text"/>

2. Upload Compliance Package with Form 51/51R: **Documents >> Upload**
  - a. Document Type for new file(s): **\*\*TO BE INDEXED\*\***
  - b. Browse, Copy/Paste or Drag and Drop files to be uploaded.
  - c. Leave Coversheets Included unchecked
  - d. Document Type = **\*\*TO BE INDEXED\*\***
  - e. Be sure to click Upload to upload the documents into the loan folder.
  - f. Click **Folder >> Folder View** to return to the folder to verify your documents have been uploaded.

**NOTE:** PHFA would prefer you to upload the original electronic version of the Appraisal if at all possible. This will ensure we have clear copies of the photos. If you upload the Appraisal separately, you can select **Appraisal** as the Document Type.

[Home >>](#)
[Folder >>](#)
[Coversheets >>](#)
[Documents >>](#)
[File Submission >>](#)
[Help](#)

File(s) to be uploaded

Document Type for new file(s): **\*\*TO BE INDEXED\*\*** Add File(s): [Browse...](#) | [Paste](#) | [Drop file\(s\) here](#)

Coversheets included

Document Type: **\*\*TO BE INDEXED\*\***  alphabetic  stacking order

Title:

Comments:

File: F:\SF\Web2\sellersguide\forms\51.pdf

[Upload](#) | [Remove](#)

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[Upload All](#) | [Remove All](#)

Upload Queue [Clear Items](#)

Status	Document Type	Title	Comments	File
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# BlitzDocs Instructions

## Submitting New Compliance Package (continued)

3. Submitting New Compliance Package to PHFA: **File Submission >> Submit New Compliance Package to PHFA**



- a. Please do not click File Submission more than once. You can verify if your field was properly submitted by checking the notes section within the loan folder. There will be a note with the description of "Submitted New Compliance Package to PHFA" if it was successful.

## Submitting Conditions - Approval, Suspense, Denial

- Review Compliance notification posted to PHFA Pipeline Plus and search in BlitzDocs for folders in Status of **Approved, Suspended and/or Denied/Cancelled**.
- If **Suspended**: Review Compliance Suspension Notification and collect all outstanding items.
  - If items can satisfy suspense, upload the items: **Documents >> Upload**; Document Type: **Compliance Suspense Conditions**
  - Select: **File Submission >> Submit Compliance Suspense Conditions to PHFA**.
  - Please do not click File Submission more than once. You can verify if your field was properly submitted by checking the notes section within the loan folder. There will be a note with the description of "Submitted Compliance Suspense Conditions to PHFA" if it was successful.
  - If items cannot satisfy suspense: Select **File Submission >> Cancelled/Denied Request**.



- If **Denied**: Review Compliance Denial Notification
  - If the denial can be disputed, collect and upload any supporting documentation: **Documents >> Upload**; Document Type: **Change Request Conditions**
  - Select: **File Submission >> Submit Change Request to PHFA**.
  - Please do not click File Submission more than once. You can verify if your field was properly submitted by checking the notes section within the loan folder. There will be a note with the description of "Submitted Change Request to PHFA" if it was successful.
  - If the denial cannot be disputed: No action is required
- If **Approved**: Review Compliance Approval Notification and collect all outstanding items.
  - Upload approval conditions: **Documents >> Upload**; Document Type: **Compliance Approval Conditions (Reviewed at Purchase)** *Documents will be submitted when the purchase package is submitted to PHFA.*
  - There is no File Submission action for approval conditions. The uploaded documents will not be reviewed until the complete purchase package has been uploaded and submitted to PHFA.

Note: PHFA will review documentation to clear Compliance Approval Conditions prior to closing only in unusual circumstances where the lender has a reasonable doubt as to whether it would satisfy a specific condition. Such documents can be emailed to [hopcompliance@phfa.org](mailto:hopcompliance@phfa.org) along with an explanation as to what condition is in question. Otherwise, documents to clear Compliance Conditions must be uploaded to Blitzdocs when the purchase package is submitted to PHFA.

# BlitzDocs Instructions

## Notifying PHFA of Cancelled/Denied Loan

If you determine that a loan previously submitted via BlitzDocs will be cancelled or denied by your organization, follow the steps below.

1. Submit request via the PHFA Pipeline Plus system. Pipeline administrators for each participating lender must add the “Loan Cancellation Requests” menu option for each user that will be submitting cancellations.

## Submitting Purchase Package to PHFA

### NOTES for Purchase Submissions:

- Complete Purchase Packages must be **submitted by 12:00pm** in order to be included in the start of the purchase process for that business day.
- When uploading miscellaneous documents that are not needed by PHFA, they can be **either**:
  - a. Uploaded as a separate **Purchase Package (Form 58 & required documents)** document type with “**MISC**” indicated in the comment section.
  - b. Uploaded after the last required item on Form 58, page 4; place a coversheet labeled “**MISC DOCS**” in front of any miscellaneous documents being submitted.

### Instructions:

1. Complete Loan Setup via PHFA Pipeline Plus
2. Upload approval conditions: **Documents >> Upload**; Document Type: **Compliance Approval Conditions (Reviewed at Purchase)** *if not already completed in previous section.*
3. Upload Purchase Package with Form 58: **Documents >> Upload**; Document Type: **Purchasing Package (Form 58 & required documents)**
4. Select: **File Submission >> Submit Purchase Package to PHFA.**
  - a. Please do not click File Submission more than once. You can verify if your file was properly submitted by checking the notes section within the loan folder. There will be a note with the description of “Submitted Purchase Package to PHFA” if it was successful.
5. **The original Note and original Title Policy must be mailed to PHFA.** The address to send the documents is **PHFA – Homeownership – Purchasing Unit, 211 North Front St., Harrisburg, PA 17101.** The purchase files will be deemed ineligible if they are not complete, including these items. To avoid ineligible conditions for these items, you should time the upload of the purchase package to coincide with the date you expect PHFA to receive the note and title policy.

Submit Purchase Package to PHFA

# BlitzDocs Instructions

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## Submitting Purchase Conditions

1. Review Purchase notification posted to PHFA Pipeline Plus and search in BlitzDocs for folders in Status of **Purchased with Conditions & Ineligible for Purchase.**
2. Upload purchase conditions: **Documents >> Upload**; Document Type: **Purchase Conditions**
3. Select: **File Submission >> Submit Purchase Conditions to PHFA.**
  - a. Please do not click File Submission more than once. You can verify if your field was properly submitted by checking the notes section within the loan folder. There will be a note with the description of "Submitted Purchase Conditions to PHFA" if it was successful.

## Submitting Servicing Conditions

1. Review Servicing Released Conditions notification posted to PHFA Pipeline Plus and search for folder in BlitzDocs.
2. Upload servicing conditions: **Documents >> Upload**; Document Type: **Servicing Conditions**
3. Select: **File Submission >> Submit Servicing Conditions to PHFA.**
  - a. Please do not click File Submission more than once. You can verify if your field was properly submitted by checking the notes section within the loan folder. There will be a note with the description of "Submitted Servicing Conditions to PHFA" if it was successful.

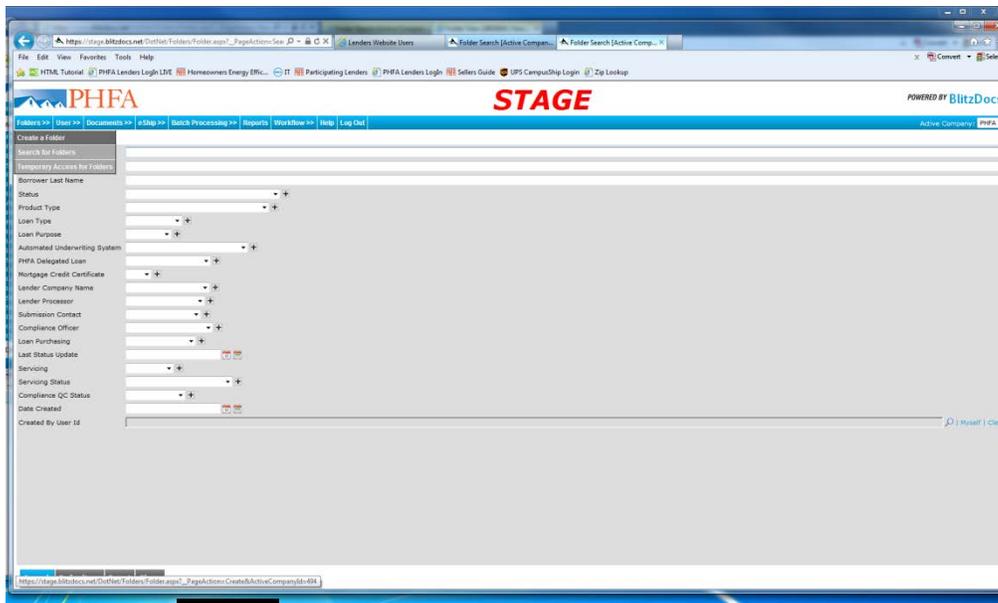
## Submitting Final Doc Conditions

1. Review Final Doc notification posted to PHFA Pipeline Plus.
2. Any Final Docs conditions must be mailed to PHFA. Do NOT upload Final Docs Conditions in BlitzDocs.
3. **The original recorded documents and the original title policy must be mailed to PHFA,** regardless of if a certified true and correct copy of the title policy was accepted to purchase the loan. These items are required by our document custodian.

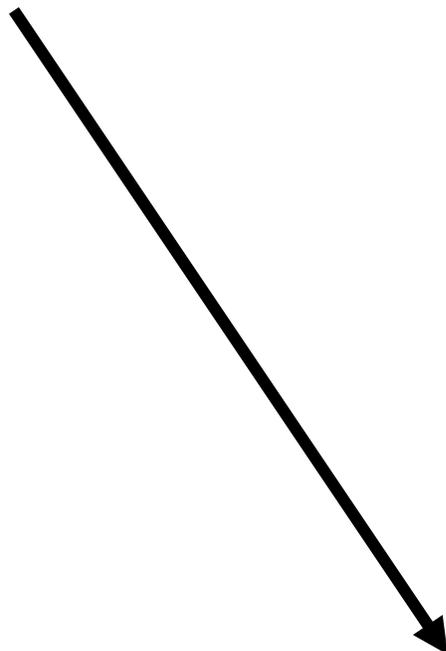
## Questions about Blitzdocs

If you have any technical questions regarding uploading your file submissions, please contact Katie Byerly at [lenders@phfa.org](mailto:lenders@phfa.org). Specific questions about loan conditions should be directed to the appropriate unit, please refer to [Appendix N](#) for the Homeownership Programs contact list.

## Step 1: Create Folder



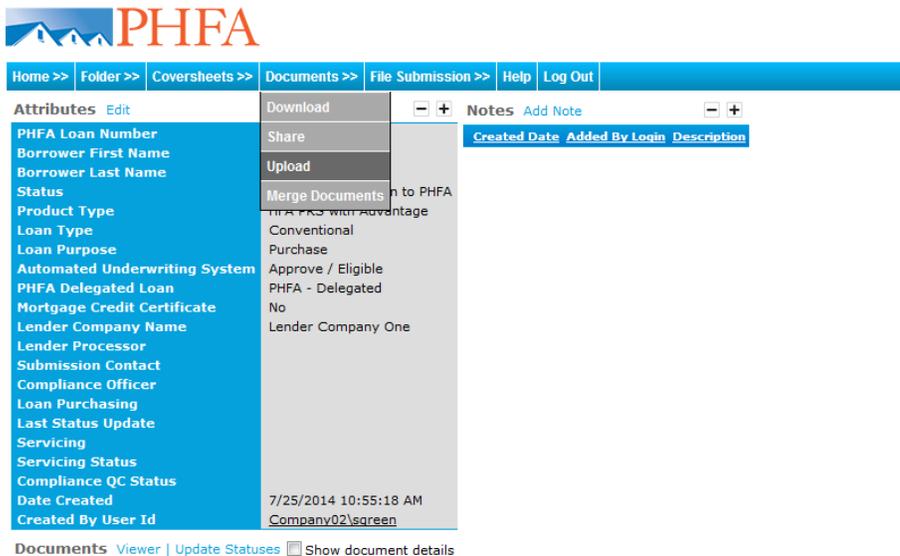
**Fill in all fields with \***  
**Click Create**



Folder Attributes	
PHFA Loan Number	<input type="text"/>
Borrower First Name	<input type="text"/>
Borrower Last Name	<input type="text"/>
Status	Pending Submission to PHFA
Product Type	<input type="text"/>
Loan Type	<input type="text"/>
Loan Purpose	<input type="text"/>
Automated Underwriting System	<input type="text"/>
PHFA Delegated Loan	PHFA - Non-Delegated
Mortgage Credit Certificate	<input type="text"/>
Lender Company Name	<input type="text"/>
Lender	(Select a value for Lender Company Name)
Lender Processor	(Select a value for Lender Company Name)
Submission Contact	(Select a value for Lender Company Name)
Compliance Officer	<input type="text"/>
Loan Purchasing	<input type="text"/>
Last Status Update	<input type="text"/> Now
Servicing	<input type="text"/>
Servicing Status	N/A
Compliance QC Status	<input type="text"/>
Folder Configuration	
Configuration	Basic Configuration
<div style="border: 1px solid gray; height: 100px;"></div>	
<input type="button" value="Create"/>	<input type="button" value="Defaults..."/> <input type="button" value="Reset"/> <input type="button" value="Close"/>

# BlitzDocs Visual Instructions

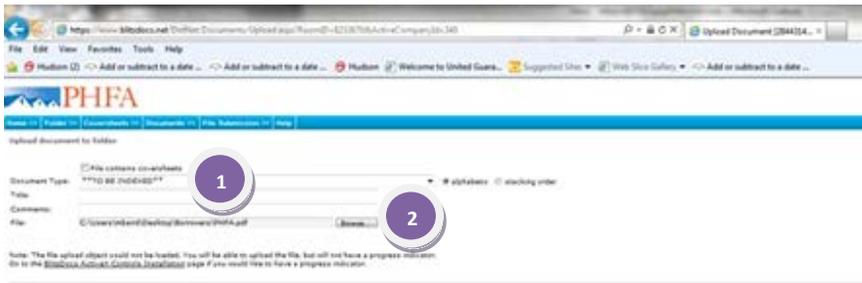
## Step 2: Upload documents



- [Go back to Suspense steps](#)
- [Go back to Change Request steps](#)
- [Go back to Purchase Package steps](#)
- [Go back to Purchase Conditions steps](#)
- [Go back to Servicing Conditions steps](#)

**\*IF YOU HAVE A SUBMIT BUTTON\***

- 1) Document Type
- 2) Browse
- 3) Submit Upload
- 4) Upload Confirmed



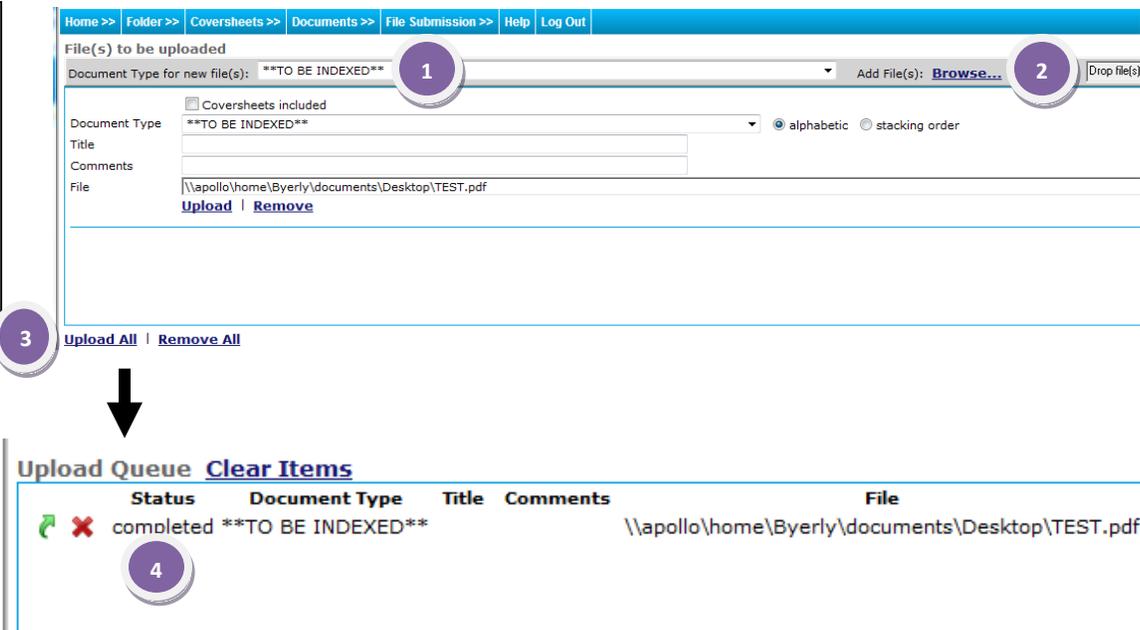
4 The documents were successfully committed to indexing. Click [here](#) to go back to folder view. Click [here](#) to go to upload more documents

## Step 3: Make sure documents were uploaded

# BlitzDocs Visual Instructions

***\*IF YOU HAVE AN UPLOAD BUTTON\****

- 1) Document Type
- 2) Browse
- 3) Submit Upload
- 4) Upload Confirmed



Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out

File(s) to be uploaded

Document Type for new file(s): **\*\*TO BE INDEXED\*\*** Add File(s): [Browse...](#) Drop file(s)

Coversheets included

Document Type: **\*\*TO BE INDEXED\*\***  alphabetic  stacking order

Title: \_\_\_\_\_

Comments: \_\_\_\_\_

File: \\apollo\home\Byerly\documents\Desktop\TEST.pdf

[Upload](#) | [Remove](#)

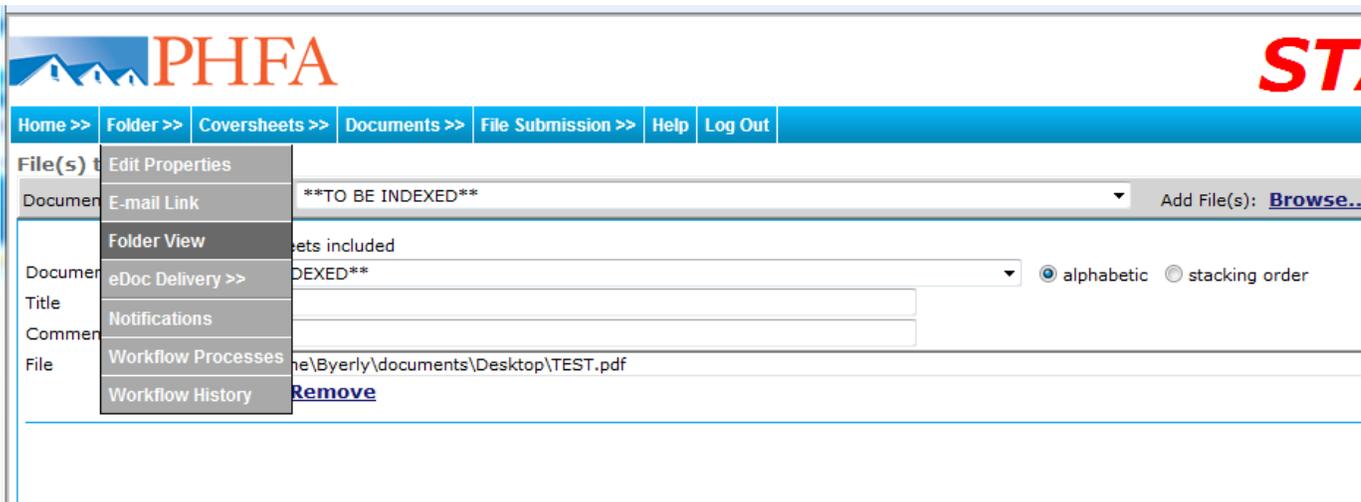
[Upload All](#) | [Remove All](#)

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[Upload Queue](#) [Clear Items](#)

Status	Document Type	Title	Comments	File
	completed	**TO BE INDEXED**		\\apollo\home\Byerly\documents\Desktop\TEST.pdf

## Step 3: Make sure documents were uploaded



Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out

File(s) to be uploaded

Document Type: **\*\*TO BE INDEXED\*\*** Add File(s): [Browse...](#)

Coversheets included

Document Type: **\*\*TO BE INDEXED\*\***  alphabetic  stacking order

Title: \_\_\_\_\_

Comments: \_\_\_\_\_

File: \\apollo\home\Byerly\documents\Desktop\TEST.pdf

[Remove](#)

- Edit Properties
- E-mail Link
- Folder View
- eDoc Delivery >>
- Notifications
- Workflow Processes
- Workflow History

## Step 4: Visually see uploaded document

Date Created: 7/25/2014 10:55:18 AM

Created By User Id: Company02\sqgreen

Documents [Viewer](#) | [Update Statuses](#)  Show document details

Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>					
	<b>**TO BE INDEXED**</b>	<b>Not Reviewed</b>	08-13-2014	PHFA\Lender	

# BlitzDocs Visual Instructions

## Step 5: Submit all documents for review



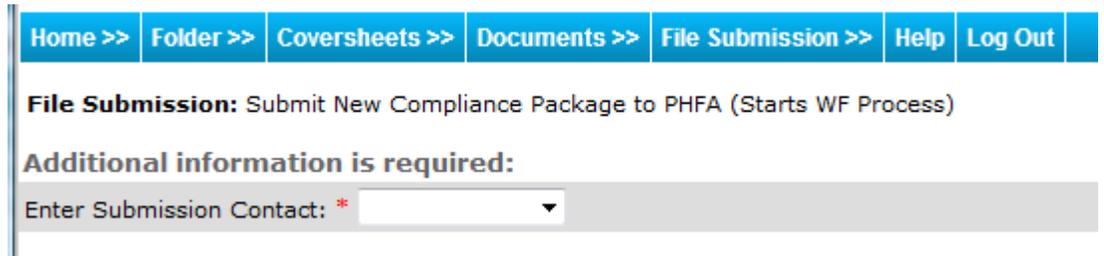
**Attributes** [Edit](#)

PHFA Loan Number	072514	Submit New Compliance Package to PHFA (Starts WF Process)
Borrower First Name	New	Submit Compliance/Suspense Conditions to PHFA (Starts WF Process)
Borrower Last Name	Test	Submit Change Request to PHFA (Starts WF Process)
Status	Pending Submission	Submit Cancelled/Denied Request to PHFA (Starts WF Process)
Product Type	HFA PRS with A	Submit Purchase Package to PHFA (Starts WF Process)
Loan Type	Conventional	Submit Purchase Conditions to PHFA (Starts WF Process)
Loan Purpose	Purchase	Submit Servicing Conditions (Starts WF Process)
Automated Underwriting System	Approve / Eligible	
PHFA Delegated Loan	PHFA - Delegated	
Mortgage Credit Certificate	No	
Lender Company Name	Lender Company One	
Lender Processor		
Submission Contact		
Compliance Officer		
Loan Purchasing		
Last Status Update		
Servicing		
Servicing Status		
Compliance QC Status		
Date Created	7/25/2014 10:55:18 AM	
Created By User Id	Company02\sgreen	

**Documents** [Viewer](#) | [Update Statuses](#)  Show document details

Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>					
		**TO BE INDEXED**	Not Reviewed	08-13-2014	PHFA\Lender

## Step 6: Enter your name as Submission Contact



**Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out**

**File Submission:** Submit New Compliance Package to PHFA (Starts WF Process)

**Additional information is required:**

Enter Submission Contact: \*

## Step 7: Click Submit



## If Suspended

### Step 1: Upload documents

Created By User Id: Company02\sqreen

Documents [Viewer](#) | [Update Statuses](#)  Show document details

Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>					
	Compliance Suspense Conditions	<b>Not Reviewed</b>	08-13-2014	PHFA\Lender	

### Step 2: Submit all documents for review

Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out

Attributes	Value	Action
PHFA Loan Number	072514	Submit New Compliance Package to PHFA (Starts WF Process)
Borrower First Name	New	Submit Compliance/Suspense Conditions to PHFA (Starts WF Process)
Borrower Last Name	Test	Submit Change Request to PHFA (Starts WF Process)
Status	Pending Submi	Submit Cancelled/Denied Request to PHFA (Starts WF Process)
Product Type	HFA PRS with A	Submit Purchase Package to PHFA (Starts WF Process)
Loan Type	Conventional	Submit Purchase Conditions to PHFA (Starts WF Process)
Loan Purpose	Purchase	Submit Servicing Conditions (Starts WF Process)
Automated Underwriting System	Approve / Eligi	
PHFA Delegated Loan	PHFA - Delegat	
Mortgage Credit Certificate	No	
Lender Company Name	Lender Company One	
Lender Processor		
Submission Contact		

## If Income, Assets, ect. extremely change

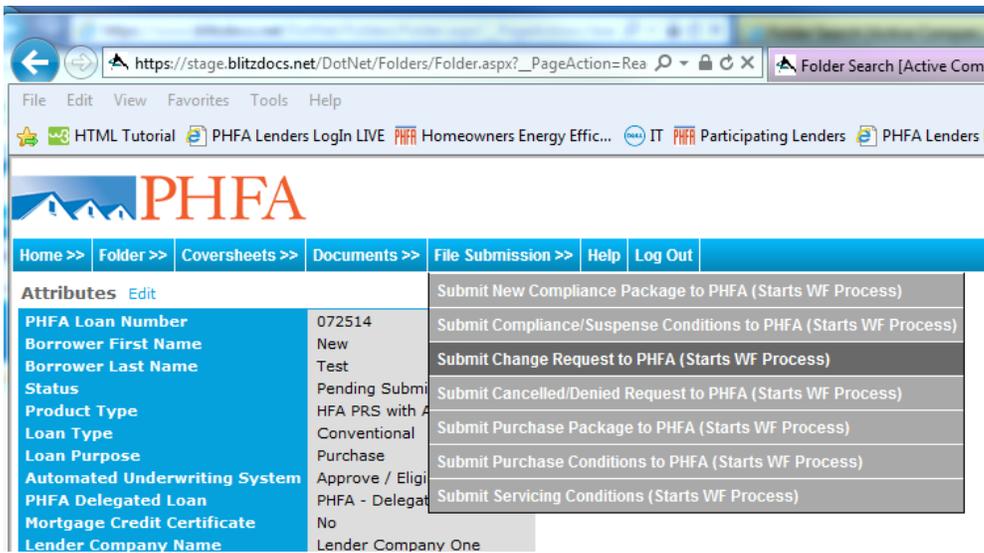
### Step 1: Upload documents

Created By User Id: Company02\screen

Documents [Viewer](#) | [Update Statuses](#)  Show document details

	Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>						
			Change Request Conditions	Not Reviewed	08-13-2014	PHFA\Lender

### Step 2: Submit all documents for review



Browser address: https://stage.blitzdocs.net/DotNet/Folders/Folder.aspx?\_\_PageAction=Rea

Navigation: Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out

Attributes	Value	Action
PHFA Loan Number	072514	Submit New Compliance Package to PHFA (Starts WF Process)
Borrower First Name	New	Submit Compliance/Suspense Conditions to PHFA (Starts WF Process)
Borrower Last Name	Test	Submit Change Request to PHFA (Starts WF Process)
Status	Pending Submi	Submit Cancelled/Denied Request to PHFA (Starts WF Process)
Product Type	HFA PRS with A	Submit Purchase Package to PHFA (Starts WF Process)
Loan Type	Conventional	Submit Purchase Conditions to PHFA (Starts WF Process)
Loan Purpose	Purchase	Submit Servicing Conditions (Starts WF Process)
Automated Underwriting System	Approve / Eligi	
PHFA Delegated Loan	PHFA - Delegat	
Mortgage Credit Certificate	No	
Lender Company Name	Lender Company One	



# BlitzDocs Visual Instructions

## Submitting Purchase Package

### Step 1: Upload documents

Created By User Id Company02\sqreen

Documents [Viewer](#) | [Update Statuses](#)  Show document details

	Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>						
			Compliance Approval Conditions (Reviewed at Purchase)	<b>Not Reviewed</b>	08-13-2014	PHFA\Lender
			Purchase Package (Form 58 & required documents)	<b>Not Reviewed</b>	07-28-2014	PHFA\Lender

### Step 2: Submit all documents for review

Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out

Attributes	Edit	
PHFA Loan Number	072514	Submit New Compliance Package to PHFA (Starts WF Process)
Borrower First Name	New	Submit Compliance/Suspense Conditions to PHFA (Starts WF Process)
Borrower Last Name	Test	Submit Change Request to PHFA (Starts WF Process)
Status	Pending Subm	Submit Cancelled/Denied Request to PHFA (Starts WF Process)
Product Type	HFA PRS with A	Submit Purchase Package to PHFA (Starts WF Process)
Loan Type	Conventional	Submit Purchase Conditions to PHFA (Starts WF Process)
Loan Purpose	Purchase	Submit Servicing Conditions (Starts WF Process)
Automated Underwriting System	Approve / Eligi	
PHFA Delegated Loan	PHFA - Delegat	
Mortgage Credit Certificate	No	
Lender Company Name	Lender Company One	
Lender Processor		
Submission Contact		
Compliance Officer		
Loan Processor		



# BlitzDocs Visual Instructions

## Submitting Purchase Conditions

### Step 1: Upload documents

Documents [Viewer](#) | [Update Statuses](#)  Show document details

	Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>						
	Purchase Conditions	<b>Not Reviewed</b>		07-25-2014	Company02\sgreen	

### Step 2: Submit all documents for review

Home >> Folder >> Coversheets >> Documents >> File Submission >> Help Log Out

Attributes <a href="#">Edit</a>		
PHFA Loan Number	072514	Submit New Compliance Package to PHFA (Starts WF Process)
Borrower First Name	New	Submit Compliance/Suspense Conditions to PHFA (Starts WF Process)
Borrower Last Name	Test	Submit Change Request to PHFA (Starts WF Process)
Status	Pending Submi	Submit Cancelled/Denied Request to PHFA (Starts WF Process)
Product Type	HFA PRS with A	Submit Purchase Package to PHFA (Starts WF Process)
Loan Type	Conventional	Submit Purchase Conditions to PHFA (Starts WF Process)
Loan Purpose	Purchase	Submit Servicing Conditions (Starts WF Process)
Automated Underwriting System	Approve / Eligi	
PHFA Delegated Loan	PHFA - Delegat	
Mortgage Credit Certificate	No	

## Submitting Servicing Conditions

### Step 1: Upload documents

Created By User Id: Company02\sgreen

Documents [Viewer](#) | [Update Statuses](#)  Show document details

	Document Type	Document Status	Title	Date Added	Added By	Comments
<b>Unsorted Documents</b>						
   	Servicing Conditions	<b>Not Reviewed</b>		07-25-2014	Company02\sgreen	

### Step 2: Submit all documents for review



<a href="#">Home &gt;&gt;</a>	<a href="#">Folder &gt;&gt;</a>	<a href="#">Coversheets &gt;&gt;</a>	<a href="#">Documents &gt;&gt;</a>	<a href="#">File Submission &gt;&gt;</a>	<a href="#">Help</a>	<a href="#">Log Out</a>
<b>Attributes</b> <a href="#">Edit</a>				Submit New Compliance Package to PHFA (Starts WF Process)		
PHFA Loan Number	072514			Submit Compliance/Suspense Conditions to PHFA (Starts WF Process)		
Borrower First Name	New			Submit Change Request to PHFA (Starts WF Process)		
Borrower Last Name	Test			Submit Cancelled/Denied Request to PHFA (Starts WF Process)		
Status	Pending Submi			Submit Purchase Package to PHFA (Starts WF Process)		
Product Type	HFA PRS with A			Submit Purchase Conditions to PHFA (Starts WF Process)		
Loan Type	Conventional			Submit Servicing Conditions (Starts WF Process)		
Loan Purpose	Purchase					
Automated Underwriting System	Approve / Eligi					
PHFA Delegated Loan	PHFA - Delegat					
Mortgage Credit Certificate	No					