

# Standard Document Naming List

## Real Estate Professional FAQs

You can speed up the processing of your short sales by using standardized names and dates for the documents you upload to Equator.® The list below provides the recommended names to use when uploading documents. It contains only the most commonly used documents and is not 100% inclusive of all items that may be needed in a short sale transaction.

If your short sale specialist requests additional documents not called out in a specific task that is assigned to you in Equator, please upload them in the Library under “Property Files” using the standard document names on the list and include the upload date in (mm-dd-yy) format.

- **Use the names on this list when uploading documents and include the upload date in mm-dd-yy format.**
- **Upload documents individually, giving each the appropriate descriptive name and date.**
- **For documents not addressed in the list, use an accurate descriptive name and the date. (Example: If you’re uploading bank statements to be used for “Buyer’s Proof of Funds,” name it “Buyers Proof of Funds mm-dd-yy.”)**

Document Name	Where to Upload
2nd lien payoff demand xx-xx-xx	In the Library under “Property Files”
4506T Executed xx-xx-xx	In the “Upload Initiation Documents” Task
Agent Commission Waiver xx-xx-xx	In the Library under “Property Files”
Agent Option Awareness Executed xx-xx-xx	In the Library under “Property Files”
Agent Value Dispute Documents xx-xx	In the Library under “Property Files”
Articles of Incorporation LLC xx-xx-xx	In the “Home Owner’s Document Collection” Task
Attorney Authorization xx-xx-xx	In the Library under “Property Files”
BAC Addendum xx-xx-xx	In the “Upload Initiation Documents” Task
Borrower Bank Statements xx-xx-xx	In the “Home Owner’s Document Collection” Task
Borrower Incentive Waiver xx-xx-xx	In the Library under “Property Files”
Borrower Pay Stubs xx-xx-xx	In the “Home Owner’s Document Collection” Task
Borrower Tax Returns Executed xx-xx-xx	In the “Home Owner’s Document Collection” Task
Buyers Acknowledgement and Disclosure xx-xx-xx	In the “Upload Initiation Documents” Task
Death Certificate xx-xx-xx	In the “Home Owner’s Document Collection” Task
Divorce Decree xx-xx-xx	In the “Home Owner’s Document Collection” Task
Executed Amended Approval Letter xx-xx-xx	In the “Upload Final Certified Docs” Task
Executed Approval Letter xx-xx-xx	In the “Upload Final Certified Docs” Task
Executed Promissory Note xx-xx-xx	In the “Upload Final Certified Docs” Task
FHLMC Short Sale Addendum xx-xx-xx	In the “Home Owner’s Document Collection” Task
Final Certified HUD xx-xx-xx	In the “Upload Final Certified Docs” Task
Form 710 Executed xx-xx-xx	In the Library under “Property Files”
HOA Bill xx-xx-xx	In the Library under “Property Files”
Indiana 15 Day Letter xx-xx-xx	In the Library under “Property Files”
Marriage Certificate xx-xx-xx	In the Library under “Property Files”
MLS xx-xx-xx	In the “Marketing Description” Task & “Listing Data” Task
Preliminary Closing HUD xx-xx-xx	In the “Upload Preliminary Closing HUD” Task
Preliminary HUD xx-xx-xx	In the “Upload Initiation Documents” Task
Pre-Qual - Proof of Funds xx-xx-xx	In the “Home Owner’s Document Collection” Task
Property Photo xx-xx-xx	In the “Listing Data” Task
Purchase Contract Addendum xx-xx-xx	In the Library under “Property Files”
Reason for Default - Hardship Letter xx-xx-xx	In the “Home Owner’s Document Collection” Task
Signed Purchase Agreement xx-xx-xx	In the “Upload Initiation Documents” Task
Third Party Authorization xx-xx-xx	In the “Upload 3rd Party Authorization” Task
Trustee Release xx-xx-xx	In the Library under “Property Files”
Wire Confirmation xx-xx-xx	In the “Upload Final Certified Docs” Task

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Bank of America  Home Loans

### Frequently Asked Questions

**1. Why was a Standard Document Naming List created?**

When files don't have standard names, they can be hard to locate in Equator and may cause processing delays. Standard descriptive naming of documents will help speed up short sale reviews during the document collection, analysis and quality review stages. It will also reduce requests for a document that you've already submitted.

**2. Does the Standard Document Naming List affect how I upload documents to Equator?**

No. All you have to do is change the name or title associated with the document and add the date that you uploaded it.

**3. What happens if I don't name my documents per the Standard Document Naming List?**

It could be harder for us to identify the appropriate document in Equator, which might delay your short sale.

**4. Where can I find the Standard Document Naming List?**

Go to the Agent Resource Center at [bankofamerica.com/shortsaleagent](http://bankofamerica.com/shortsaleagent) and click on the "Short Sale Process" tab. The Standard Document Naming List can be found in the "Short Sale Forms" section.

**5. Will my documents be rejected if they don't have the new document titles?**

No. But if you use the new recommended names for the documents, the short sale process may go faster.

**6. Why do I need to list the date in the standard names of documents?**

You're often required to upload updated versions of the same document. By providing the date at the time you upload, it's easier for the short sale specialist to identify the appropriate version. This will also make it less likely that you'll be asked to provide a document that you've already uploaded.

**7. What date do I list in the title of the document?**

Use the date that you are uploading the document to Equator.

**8. Will Equator eventually have these standard document titles listed rather than asking agents to manually key in the titles?**

Eventually, yes. Until then, please voluntarily adopt the recommended Standard Document Naming List process to make your short sales run a bit smoother.