FHLBank San Francisco

How to Upload WISH Documents

WISH Program documents will only be accepted if they are successfully uploaded to a workspace on the Bank's secure portal. The Bank must create a workspace for your application or reservation of funds, and portal users of that workspace must also be designated and authenticated before you can upload any documents.

Submit a Secure Portal Workspace Set-up Request Form for your WISH application or reservation.

To successfully upload documents and avoid rejection/resubmission:

- **Redact or exclude** personal identifying information such as:
  - First five digits of social security numbers or financial account numbers
  - Complete driver's license number or other identifying information
  - Any medical records or information
- **Upload a single file** to each folder.
  - Combine multiple documents into one PDF file as needed.
  - Attachment to the Certification and Disbursement Request eForm should be uploaded in Excel file format. The rest of the documents should be uploaded in PDF file format.
  - Re-uploading files into folders will overwrite previously uploaded documents.
- **Upload documents** to the appropriate subfolder
  - Do not rename, move, or delete folders
- **Signed documents** should be scanned and uploaded as a PDF

Application Workspaces

You can begin uploading documents once a workspace has been created for your WISH application and portal users have been designated and authenticated.

An application workspace will contain two folders:

1. Application/Participation
2. Direct Subsidy Agreement

Upload PDF documents to the appropriate folder, combining multiple documents into one PDF file as needed. When the files have successfully been uploaded, notify the Bank by email. The Bank will confirm receipt of your documents.

If a document fails to meet the Bank's guidelines, listed above, you will receive instructions for resubmission.

Reservation Workspaces

You may upload documents to request a disbursement after the homebuyer closes escrow.

After funds reservation requests have been processed, the Bank will notify you when a folder has been created for the homebuyer in the reservation workspace.

The homebuyer's folder contains the following subfolders required for disbursement:

1. Certification and Disbursement Request
2. Attachment to the Certification and Disbursement Request
3. Program Enrollment Form
4. AHP Household Income Qualification Workbook
5. Signed Closing Disclosure
6. Homebuyer Counseling Certificate
7. Income Documents
8. Retention Mechanism *(include Promissory Note, Deed of Trust, and Rider to the Deed of Trust)*

Upload PDF or Excel documents to the appropriate subfolder, upload only a single file to each folder, combining multiple documents into one PDF file as needed.

When the files have successfully been uploaded, notify the Bank by email. The Bank will confirm receipt of your documents.

If a document fails to meet the Bank's guidelines, listed above, you will receive instructions for resubmission.

For questions, please email wishportal@fhlbsf.com or call 415-616-2542 or visit fhlbsf.com.