FILE EXCHANGE UPLOAD

SC Housing

Users Guide

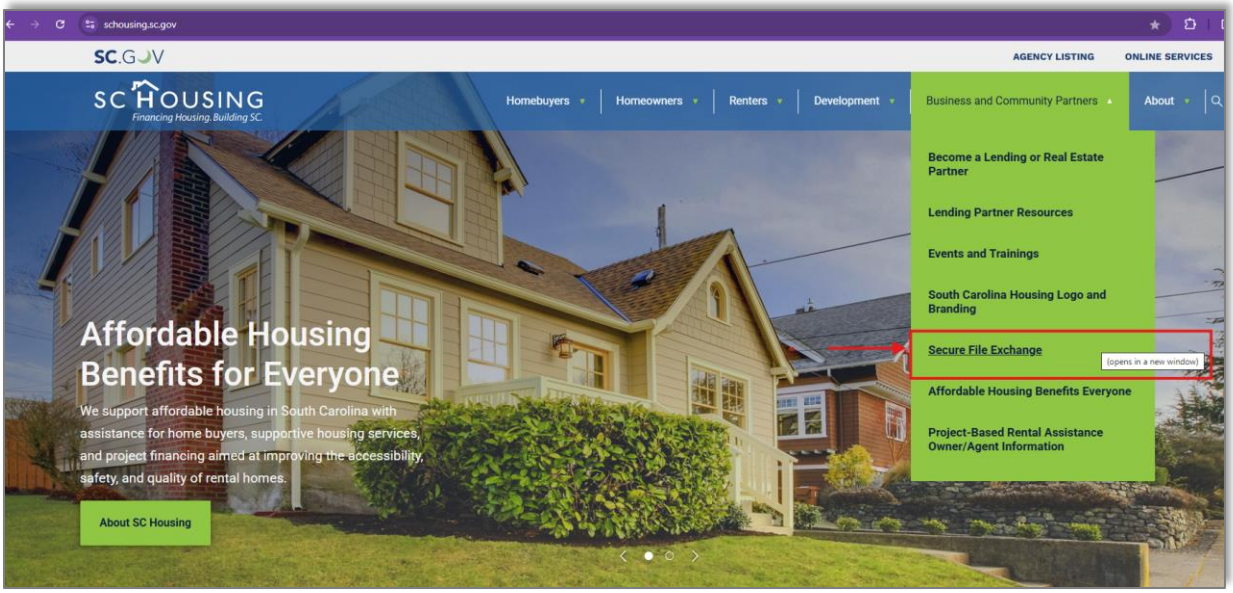
This guide describes how to securely upload and exchange documents with the South Carolina State Housing Finance & Development Authority

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ACCESSING THE SECURE FILE EXCHANGE

To access the file exchange, launch the schousing.sc.gov website and select ***Secure File Exchange*** from the **Business and Community Partners** menu or click on fileexhange.schousing.com:



Selecting ***Secure File Exchange*** launches the upload wizard home page in a new window:



UPLOADING DOCUMENTS

Once you have accessed the upload wizard home page and you are ready to upload files, the system will be guide you through a series of steps to successfully support SC Housing in processing your documents.

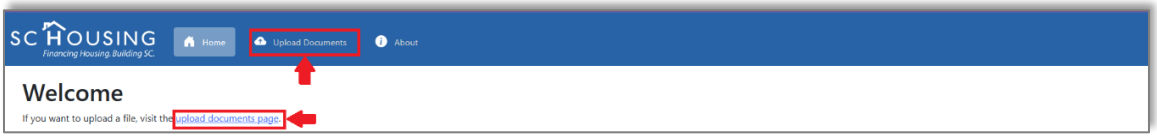
The four (4) key steps involved with securely uploading documents via the File Exchange include:

1. **Folder Selection** – user chooses the appropriate department recipient folder
2. **Upload Information** – user enters the sender and recipient contact information
3. **Upload Documents** – user chooses and uploads the file(s)
4. **Review & Submit Upload** – user reviews and securely submits the file upload

SELECT A FOLDER

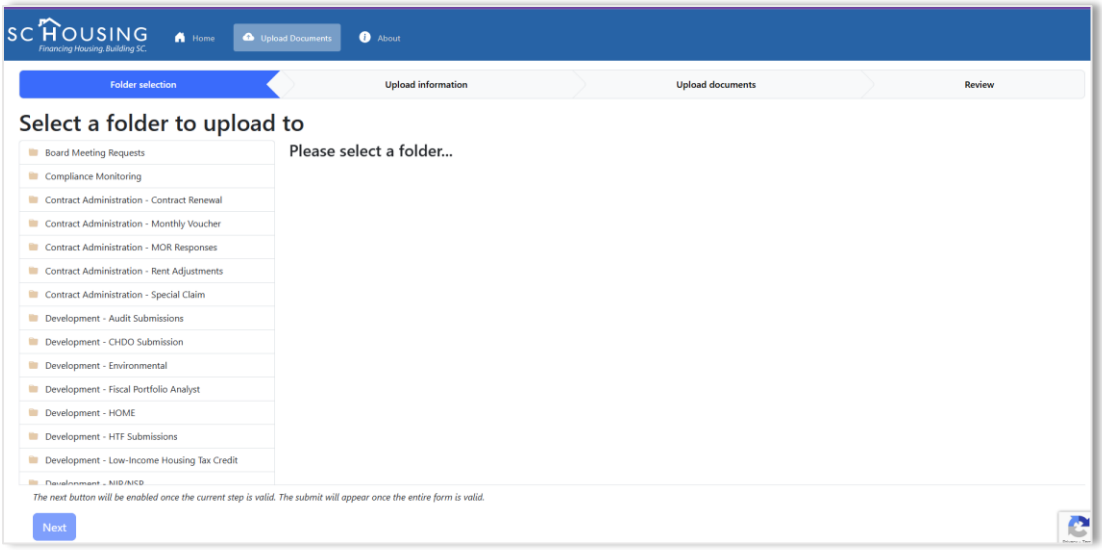
The first step is to determine the appropriate department folder you want to upload and send the file(s) to.

To upload a file, begin by clicking on the upload documents page link from the home page or the *Upload Documents* icon from the top menu bar.



Once clicked, the **Folder Selection** screen will display folders for each recipient department as shown in Example 1.

Example 1 – Before Selecting Folder

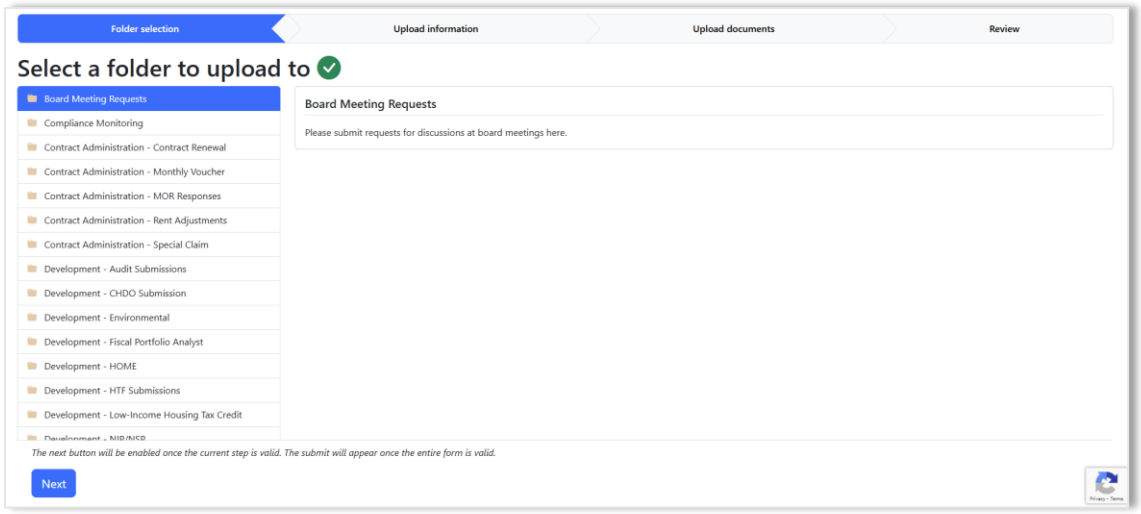


The user will choose from one of the following recipient folders:

- Board Meeting Requests
- Compliance Monitoring
- Development
- Housing Tax Credits
- ITC
- Workforce Housing

Once any folder is clicked and selected, a green checkmark icon will appear dynamically next to the title as shown in Examples 2 and 3. This green checkmark will appear throughout the site whenever all required information has been provided successfully. It signifies when the step or action is complete and enables you to proceed to the next step.

Example 2 - After Selecting Folder

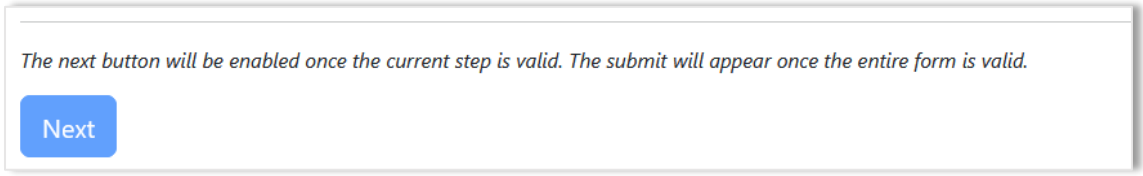


Example 3 - Completed Step Indicator

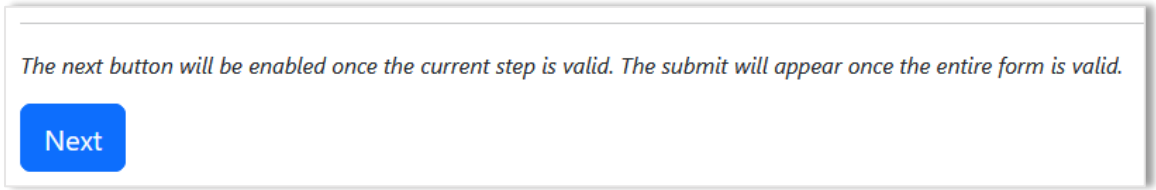


Once a step is completed, navigate to the next step by clicking on the *Next* button at the bottom of the page (see Example 5). Otherwise, this button is defaulted to disabled (see Example 4).

Example 4 – Next Step Button Disabled



Example 5 – Next Step Button Enabled



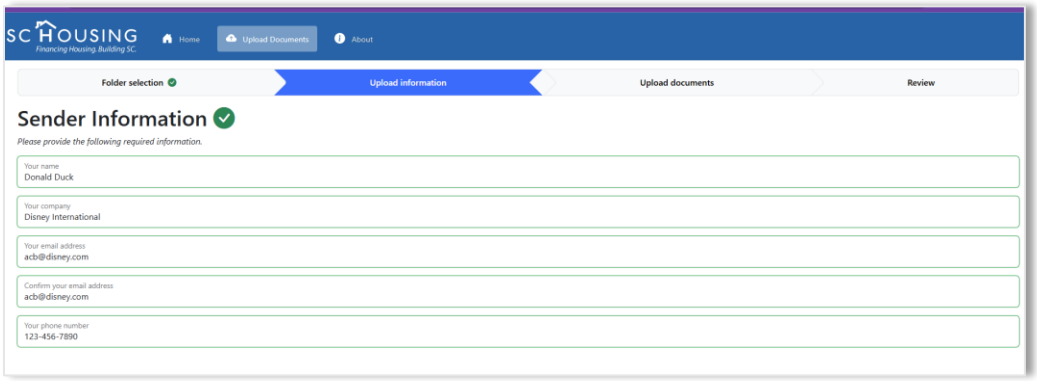
UPLOAD INFORMATION

The second step involves providing details about the sender and the intended file upload recipient such as:

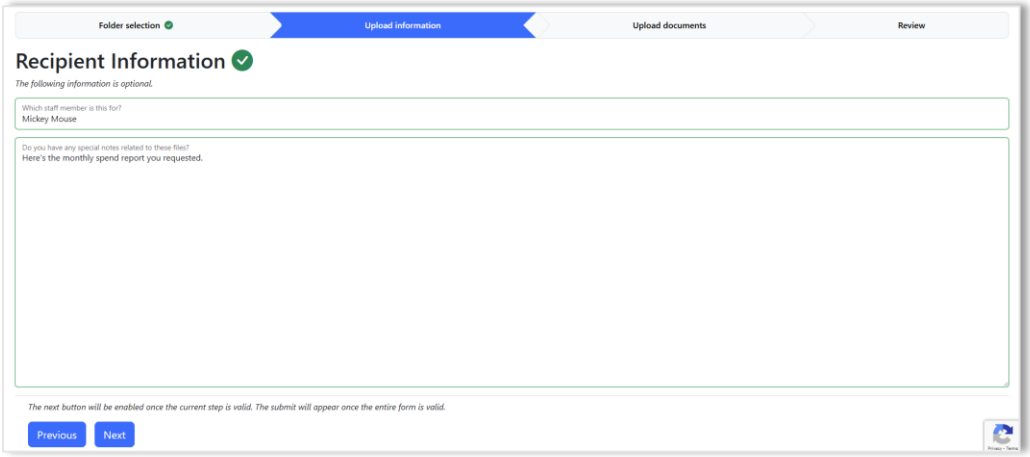
1. **Sender Information** (Example 6) – provide the required sender's name, company name, email address and optional contact phone number. The email address will serve as the primary method of contact and will be used for file upload alerts and confirmation receipts.
2. **Recipient Information** (Example 7) – provide the optional recipient name, who will be referred to as the file upload recipient SC Housing staff member. The name does not have to be an exact match. You may also use the **Additional Information** field to message the recipient on how the uploaded documents should be processed and handled.

Once all prompts have been completed, you can proceed the next step.

Example 6 – Sender Information



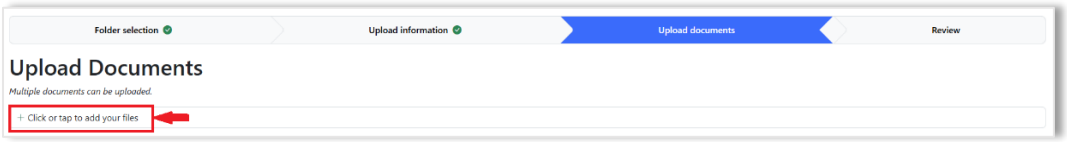
Example 7 – Recipient Information



UPLOAD DOCUMENTS

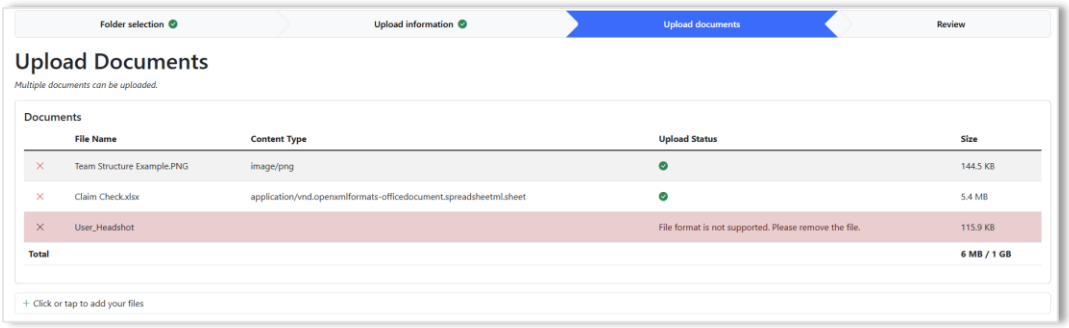
The third step involves selecting the documents to upload. Documents can be selected by clicking on *+ Click or tap to add your files* (Example 7). This will open your device's file selector where you can select one or more documents to upload. A total file size up to **1000 MB/1 GB** can be uploaded in a single request.

Example 7 – Upload Files



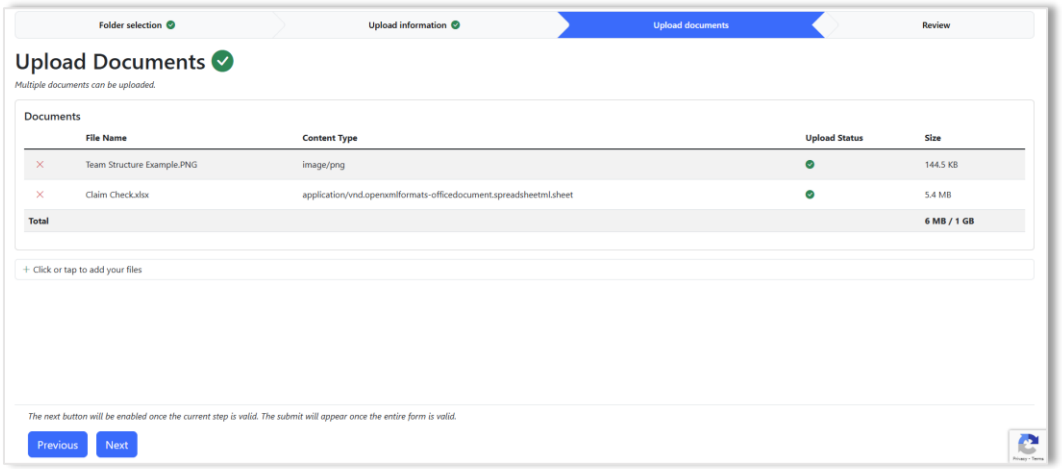
Once the files are selected, the successfully formatted document files will display a green checkmark as the **Upload Status** for all files. If any of the files are types are unsupported, the row will highlight red and the **Upload Status** will display the error message: *File format is not supported. Please remove the file*. Unsupported or ineligible files can be removed by clicking the red *X* to the left of the File Name (Example 8).

Example 8 – Upload Status with Errors



Once all eligible documents have been uploaded successfully without errors (Example 9), you can proceed the last step.

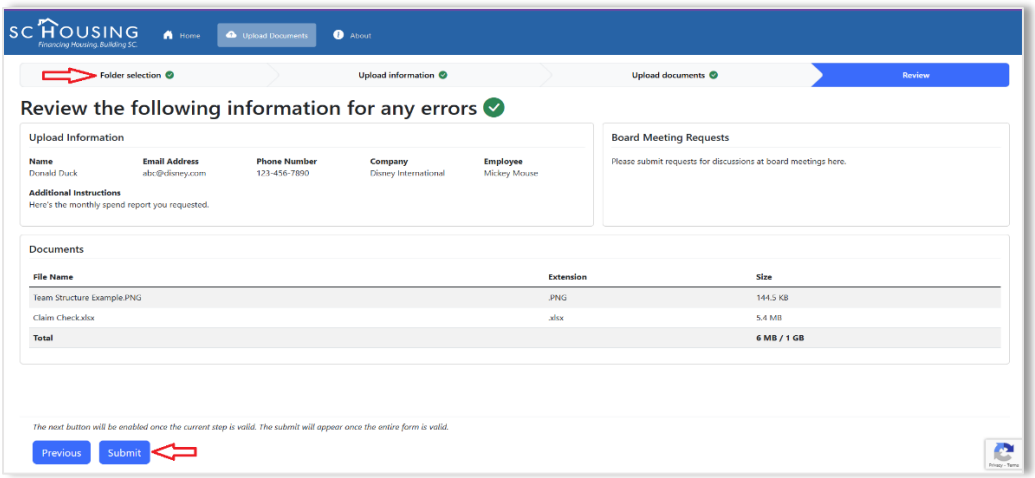
Example 9 - Upload Status without Errors



REVIEW & SUBMIT UPLOAD

The last and final step allows the sender to conduct a final review of all previously provided file upload information before submission. Once all information is correct, submit the documents by clicking the enabled submit button at the bottom of the page (Example 10). If you wish to update information in a previous step before submission, simply click the *Previous* button at the bottom of the page, or the step name in the top navigation menu. A loading screen will display while the documents are uploading.

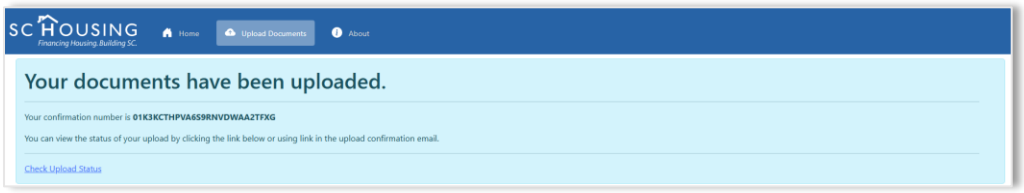
Example 10 – Review & Submit Upload



UPLOAD CONFIRMATION

Once all of the document upload steps have been completed and the documents have been successfully uploaded, an upload confirmation screen will appear displaying the upload confirmation number (Example 11). This confirmation number will also be emailed to the sender's email address, along with the sender's contact name, file name, memo, and file upload date timestamp (Example 12).

Example 11 – File Upload Confirmation



Example 12 – File Upload Confirmation Email



If you want to confirm the status of the upload, simply click the Check Upload Status link at the bottom of the File Upload Confirmation screen or in the confirmation email to view File Upload Status screen (Example 13).

Example 13 – File Upload Status

