Document Naming Conventions – Revised 5.16.2023

To help expedite the application process, **please use this guide to name the documents you upload** (or have already uploaded) to your file cabinet. This is especially important because some drawings may be on a First Come First Served basis.

Important:

- Click here to access a short video: [How to Name or Correct the Document Names in Your File Cabinet](#)
- Click here to access a short video: [Frequent Mistakes to Avoid when Uploading to the File Cabinet](#)
- Ensure that all the documents you upload are PDF format. No JPEG, screenshots, or pictures.
- When renaming the documents in the file cabinet, **do not remove** ".pdf" from the file name.
- Do not add characters, letters, or numbers after ".pdf"
- Remove any special characters like **'** (apostrophes), **#**, parenthesis (), or any other unique characters.
- Do not use front slashes "/" for dates; instead use "." periods. (e.g., not 1/1/2023, instead type 1.1.2023)
- A file name can have blanks between the words, **-** (dash) and **_** (underscore) as part of its naming convention.
- Please review your file cabinet for duplicate documents; they slow down the review process.
- Do not lump documents together, each document must be uploaded separately. For example, if you have 6 paystubs in 3 months, you need to upload each one separately.
- For the Ownership Program, please **do not** delete the 5 initial documents listed on the Opportunity Drawing Notice that is required by the "File Submission Deadline" or you will lose the upload date timestamp as proof you submitted on time. The 5 initial files are HouseKeys Program Application, the Latest Tax Return, the Last 30 Days of Paystubs, Loan Pre-Approval Documentation, and Proof of Down Payment Funds.

Paystubs

Paystub – Company Name - Pay Period Start Date AND Pay Period End Date – First Name

Examples:

- *Paystub –Kaiser - 3.1.2022 – 3.15.2022 - John Sr.pdf*
- *Paystub – Kaiser - 3.16.2022 – 3.31.2022 - John Sr.pdf*
- *Paystub – Kaiser - 4.1.2022 – 4.15.2022 - John Sr.pdf*

Other Income

Child Support Payments – Year to date

- *Example: Child Support- 1.1.2022 - 11.15.2022 – John Jr.pdf*

Social Security Income Benefits:

- *Example: Social Security Award Letter – 2022 – Mary Smith.pdf*

Unemployment:

The document should include the last three months of pay and/or the award letter

- *Unemployment – 1.1.2022 – 3.31.2022 – Mary Smith.pdf*
- *Unemployment Award Letter – 1.1.2022 – Mary Smith.pdf*

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Bank, Retirement, and Investment Statements:

Bank Name or Bank Initials – Acct - Last 4 digits of the account- time frame
Examples:

- *Wells - Acct 2245 – 1.16.2022 – 2.15.2022.pdf*
- *Wells – Acct 2245 – 2.16.2022 – 3.15.2022.pdf*
- *Wells – Acct 2245 – 3.16.2022 – 4.15.2022.pdf*

Tax Forms:

Year - Federal Tax Returns (aka 1040 forms) – Name of First person listed on the forms.

Note: In this example, John Doe Jr files his taxes separately.

Example:

- *2021 – 1040 - John Doe **Sr**.pdf*
- *2021 – 1040 - John Doe **Jr**.pdf*

Year - w-2 forms – Company (employer) – Frist Name, last name

Example:

- 2021 – W2 – Kaiser – *John Doe **Sr**.pdf*
- 2021 - W2 – Safeway - *John Doe **Jr**.pdf*

Year - 1099 forms – issuer name - Frist Name, last name

Example:

- 2021 – 1099 – Uber – John Doe **Sr***.pdf*
- 2021 – 1099 – Uber – John Doe **JR***.pdf*

Identification Documents:

Type of document - name

Example:

- Driver License – John Doe*.pdf*
- U.S. Resident Card – John Doe*.pdf*
- Social Security Card – John Doe*.pdf*
- Birth Certificate – John Doe Jr*.pdf*

Court Documents:

Example:

- Divorce Decree – Name*.pdf*
- Child Custody Agreement – date *.pdf*

Other Documents:

Exhibit A – Acct 4 last digits*.pdf*

Example:

5.12.2023

- Exhibit A – Wells Acct 3454*.pdf*