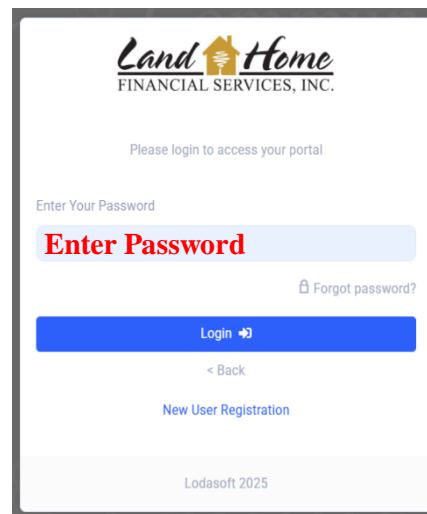
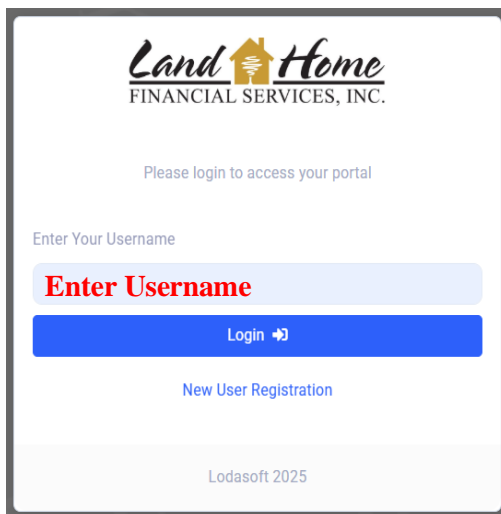


HOW TO SUBMIT A LOAN THROUGH DASH

Please utilize the following steps to submit a loan.

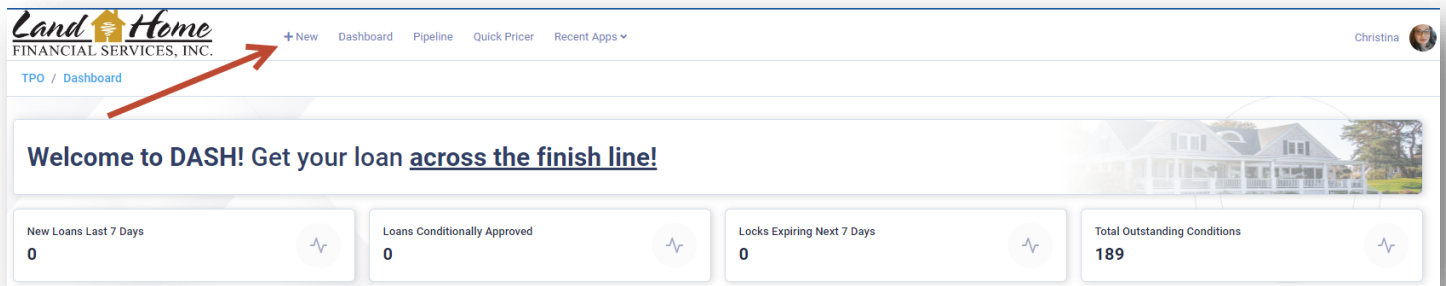
Log into [DASH](#)

Enter credentials provided by LHFS.



TPO Dashboard will automatically open upon successful login.

- Select “New” to upload a new file, **OR**
- Select “Dashboard” to review current pipeline and/or status of files.



Upload a New File

Select “+New” → “New Application” to upload a loan file and select “Import MISMO 3.4 (xml).”

1. Select “Choose MISMO File”
 - Upload 3.4
2. Under “Channel” field, select “Brokered” or “Correspondent”
3. Make certain the following fields are accurate:
 - “Company” and Contacts
4. Upon completion, click “Process MISMO File” to start the file import process.

TPO / New Application

The screenshot displays the 'TPO / New Application' dashboard. At the top, there are tabs for 'Upload File', 'Review Data', and 'Submission'. The 'Submission' tab is active, and a red box labeled '1' points to the 'File Import' section. Below this, there are links for 'Import MISMO 3.4 (xml)', 'Import DU 3.2 (fnn)', 'Import From Fannie', and 'Start New Application'. The 'Import MISMO 3.4 (xml)' link is highlighted. Below the links, a message says 'Please Upload A Valid MISMO 3.4 File To Start Your Submission' with a yellow box containing a cloud icon and the text 'Drag and drop a file here or click'. Below this, there is a 'Choose The Channel' section with a 'Channel' dropdown set to 'Brokered' and a 'Company' dropdown set to 'Fake External Company'. A red box labeled '2' points to the 'Channel' dropdown with the text 'Select channel if applicable'. Below this, there is a 'Choose The Contacts' section with two dropdowns: 'TPO LO' set to 'Johnson, Christina' and 'TPO Processor' set to 'Johnson, Christina'. A red box labeled '3' points to the 'TPO LO' dropdown with the text 'Confirm Data'. At the bottom, there is a blue button labeled 'Process MISMO File'. A red box labeled '4' points to this button with the text 'Process MISMO File'.

Uploading Loan – Review Data

Please Note: User must select the correct Loan Purpose and Loan Type to accurately trigger necessary submission requirements.

1. Loan Purpose - Select applicable purpose
2. Loan Type - Select applicable type and click “Proceed to Import File”
3. Click on “Register File” (Submission)
4. A new window will appear with questions tailored to the selected loan type. Please respond accordingly and click “Next” to proceed.

1 Select "Loan Purpose"

2 Select "Loan Type"

3 Select "Register File" to complete the process

4

Application 1

Down Test

Borrower Type: Individual

Subject Property

3849 N Pioneer Ave, CHICAGO, IL, 60634

Loan Type: --

Loan Purpose: Purchase

Loan Amount: \$506,625.00

Appraised Value: \$525,000.00

LTV/CLTV: 96.500% / 100.000%

Rate: 7.875%

Subject Property

3849 N Pioneer Ave, CHICAGO, IL, 60634

Loan Type: FHA

Loan Purpose: Purchase

Loan Amount: \$506,625.00

Appraised Value: --Select--

LTV/CLTV: Conventional

Rate: FHA

VA

Reverse / HECM Mortgage

LINK - Seller Financing Agreement

LINK Convertible Lease

Please Confirm Loan Details

Loan Purpose: Purchase

Loan Type: Purchase

Refinance

Link Convertible Lease

LINK - Seller Financing Agreement

Reverse Mortgage Purchase

Reverse Mortgage Refinance

Please Confirm Loan Details

Loan Purpose: --Select--

Loan Type: FHA

Back

Proceed To Import File

TPO / New Application

Upload File

Review Data

Register File

Please click register to import this file

Back

Register File

Please click register to import this file

Checklist

Will you be using our FHA Cook County DPA Program?

Answer: -- Select One --

Total number of questions are subject to change as per selected answer.

1 of 2 Questions

Next

Review outstanding conditions:

TPO / Loan Summary

Test, Down LTV 96.5% FICO -- 7.875% DTI 39.212% / 39.212% FTC (\$12,766.88)

Down Test

3849 N Pioneer Ave
CHICAGO
Address

Lead - New
Loan Status

Loan Number

Wholesale
Channel

Borrowers(1)

Test, Down
9562 W UNSER AVE Test@email.com
(M) (111) 111-111

Lead - New
Loan Status

Outstanding Tasks
7

Click on the red number to review outstanding condition

Loan Details

FHA Loan Type	Purchase Loan Purpose	\$525,000.00 Purchase Price	\$525,000.00 Appraised Value	\$506,625.00 Loan Amount
---	---	\$18,375.00 Down Payment	---	\$515,490.00 Total Loan Amount
---	---	360 Term	---	\$18,375.00 Subordinate Lien Amount
---	---	---	MIP/PMI Amount	---
---	---	---	Price	---
---	---	---	Comp Type	---

Origination Info

---	---	---
Origination Date	Lock Date	CD Issue Date
---	---	---
CD Signed Date	Lock Expiration Date	---

Closing Info

---	---	---
Estimated Closing Date	Closing Date	First Payment Date
---	---	---
Payoff Expiration Date	Funding Date	---

Loan Summary

URLA 2020

Services

- Credit
- VOI/VOE
- VOA
- AUS
- Appraisal

Fees

Pricing

Conditions

Submission

Additional

Review URLA by clicking on “URLA 2020” and edit as needed.

TPO / URLA

Test, Down LTV 96.5% FICO -- 7.875% DTI 39.212% / 39.212% FTC (\$12,766.88)

Down Test

3849 N Pioneer Ave
CHICAGO
Address

Lead - New
Loan Status

Loan Number

Wholesale
Channel

Loan Summary

URLA 2020

- 1. Borrower Info
- 2. Financial Info
- 3. Real Estate Owned
- 4. Loan & Property Info
- 5. Declarations
- 7. Military Service
- 8. Demographics
- 9. Loan Originator Info

Edit URLA by clicking "URLA 2020"

Pay close attention to yellow notifications. Resolve them by providing the necessary data.

1. Borrower Information DTI (front/back): 39.212% / 39.212%

Test, Down (B)

1a. Contact Info

FIRST NAME Down	MIDDLE NAME Payment	LAST NAME Test	SUFFIX	SIGNING ROLE Borrower	BORROWER TYPE Individual
SECONDARY E-MAIL		CELL PHONE (111) 111-1111	HOME PHONE (111) 111-1111		
DATE OF BIRTH 07/1997		CITIZENSHIP US Citizen	PREFER. LANGUAGE? English		
CREDIT CHECK AUTHORIZED		CREDIT REF #	CREDIT SCORE		
E-CONSENT AUTHORIZED		MARITAL STATUS	# OF DEPENDENTS		DEPENDENT AGES

1a. Address Info

PRESENT ADDRESS UNIT # CITY STATE ZIP CODE COUNTRY

6 year(s) 5 month(s) + Add Address

Submission Screen

Upload applicable documents and click “Submit”

TPO / Submission Test, Down LTV 96.5% FICO -- 7.875% DTI 39.212% / 39.212% FTC (\$12,766.88)

Loan Number

Wholesale Channel

Loan Summary

URLA 2020

Services

- Credit
- VOI/VOE
- VOA
- AUS
- Appraisal

Fees

Pricing

Conditions

Submission

Additional

	Asset Documentation per AUS Findings (Showing Sufficient Funds)	drop or click	4/11/25, 3:53 PM Requested 23m ago	Pending
	Photo ID For: Test, Down	drop or click	4/11/25, 3:53 PM Requested 23m ago	Pending
	Credit Report (Within Past 60 Days) For: Test, Down	drop or click	4/11/25, 3:53 PM Requested 23m ago	Pending
	Most Recent 30 Day Paystubs For: Test, Down	drop or click	4/11/25, 3:54 PM Requested 23m ago	Pending
	Written VOE Most Recent 2 Years For: Test, Down	drop or click	4/11/25, 3:54 PM Requested 23m ago	Pending

Optional Conditions (Provide for a Cleaner Approval)

Actions	Description	Files	Due Date	Status
Start	Verbal Credit Authorization		4/11/25, 3:53 PM	Pending

Data Validation

Passed

Disclosure Path

Who is sending initial disclosures
Lender

There is no key date for TRID Application Date

Selected Product And Pricing

Program Name	Lock Status	Rate	APR	Price	Comp Type
		7.875%			

Submit Loan

Review / Submits the Following Via Dash

- ☐ Uploads 3.4
 - ☐ Complete URLA - pay special attention to yellow notifications, clear them if possible
- ☐ Upload items required for submission
 - ☐ Include Credit Report
 - ☐ Verbal Credit Authorization, if applicable (Access “[How to Upload Documents / Complete a Form via DASH](#)”)
- ☐ Set up a customized signature through DASH! Access “[How to Create a DASH Profile](#)”

How to Upload Documents / Complete a Form via DASH:

1. Click on the applicable green arrow button (located under “Detail”) to upload documents. corner.
2. If applicable, Generate form
 - A. Select “Start Document Generation”
 - B. Document Generation window will appear – Enter authorization date, select “Finish & Generate Doc”
 - C. Completed document has been instantly created!
3. Review Form or Document
 - D. Click on applicable link to access document
 - E. Optional, select the trash icon to delete.

The screenshot illustrates the DASH interface for document management. At the top, there are tabs for 'All', 'Outstanding', 'TPO Submitted', and 'Cleared'. Below these is a table with columns: Error, Detail, Borrow, Due Date, View File, and Status. The table lists several documents, including 'Purchase Contract and All Addendums', 'Earnest Money Deposit - Showing', 'Cleared Through Bank', and 'Verbal Credit Authorization'. Green arrows point to the 'Detail' column for each row, indicating where to click to upload documents. A red box with the text 'Utilize green arrow upload button to upload documents' points to the first green arrow. Another red box with the text 'Need to create a form? If applicable, click on the green arrow upload button to generate form.' points to the green arrow for 'Verbal Credit Authorization'. Below the table, there are two pop-up windows. The first is 'Task Information' for 'Verbal Credit Authorization', showing fields for Description, Notes, Request Date, Due Days, Responsible Party, Condition, and Request From. A red arrow points to the 'Start Document Generation' button. The second pop-up is 'Generate Document Template', showing fields for Company, Verbal Credit Authorization Date, and a 'Finish & Generate Doc' button. A red arrow points to this button. A third red arrow points to the 'Finish & Generate Doc' button in the bottom right corner of the 'Generate Document Template' window.

Error	Detail	Borrower	Description	Request Date	Due Date	View File	Status
			Purchase Contract and All Addendums	8/25/22 2:46 PM	8/25/22 2:46 PM		
			Earnest Money Deposit - Showing Cleared Through Bank	8/25/22 2:46 PM	8/25/22 2:46 PM		
			Asset Information per All (Show Funds)	8/25/22 2:46 PM	8/25/22 2:46 PM		
			Verbal Credit Authorization	8/25/22 2:46 PM	8/25/22 2:46 PM	Verbal Credit Authorization.pdf	
		Mia Toretto	Upload Credit Report Dated Within 90 Days	8/25/22 2:46 PM	8/25/22 2:46 PM		
		Mia Toretto	Upload Credit Inquiry Letter (120 Days)	8/25/22 2:46 PM	8/25/22 2:46 PM		

How to access or review form and/or documents

Form has been successfully created if the highlighted is visible.

Task Information

Description: Verbal Credit Authorization

Notes: To notify a user, simply type @ and select them from the list.

Request Date: 08/25/2022 2:46PM

Due Days: 0

Responsible Party: Johnson, Christina

Condition: ☐

Request From Borrower: ☐

Generate Document

Start Document Generation

File name

☐ Verbal Credit Authorization.pdf

Action

Click on document to review

Delete is an option if changes are needed

EXAMPLE DOCUMENT (FORM INCLUDING CUSTOM SIGNATURE)

Verbal Credit Authorization Certification

Borrower Name: Mia Toretto
Property Address: 1234 Test Street
Property City: CONCORD State: CA Zip: 94519

I, the undersigned representative of Fake External Company (Main),
do hereby certify that I had verbal permission to pull the credit report for the above-referenced borrower(s) on 8/25/2022

By (Loan Officer's Signature):
Date: 08/25/2022

