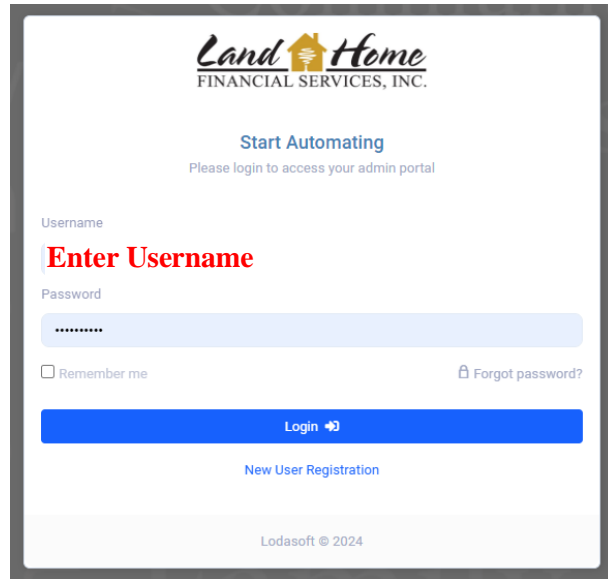


## HOW TO SUBMIT A LOAN THROUGH DASH

Please utilize the following steps to submit a loan.

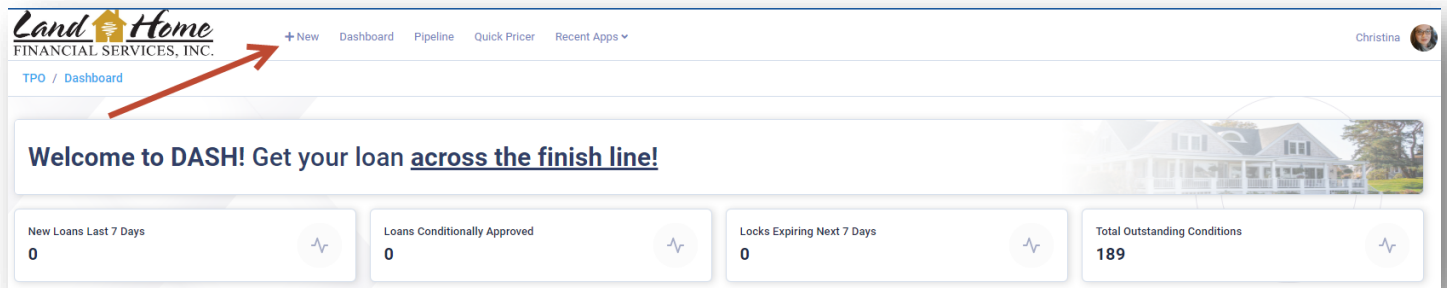
### Log into [DASH](#)

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

**File Import**

Upload File | Review Data | Submission

Import MISMO 3.4 (xml) | Import DU 3.2 (fnn) | Import From Fannie | Start New Application

Please Upload A Valid MISMO 3.4 File To Start Your Submission

Drag and drop a file here or click

TPO / New Application

Please Upload A Valid MISMO 3.4 File To Start Your Submission

XML

**Choose The Channel**

Channel: Brokered

Company: Fake External Company

**Choose The Contacts**

TPO LO: Johnson, Christina

TPO Processor: Johnson, Christina

TPO LOA: Johnson, Christina

TPO Management: Johnson, Christina

**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
3. Review and complete “Loan Characteristic(s)” as needed
4. Proceed to “Borrower Characteristic(s)” and complete as needed
5. Click “Proceed to Final Review” (Submission)

TPO / New Application

Upload File
Review Data
Missing Information
Loan Characteristic(s)
Borrower Characteristic(s)
Submission

Please Confirm the Borrower Print Order

Application 1  
Phil Fish

Subject Property

3096 Plaza Blanca , SANTA FE, NM, 87507  
Loan Type: --  
Loan Purpose: --  
Loan Amount: \$250,000.00  
Appraised Value: \$415,000.00  
LTV/CLTV: 0.000% / 0.000%  
Rate: 5.5%

Please Confirm/Provide the Loan Purpose and Loan Type

Loan Purpose
--Select--
Purchase
Refinance
Link Convertible Lease
LINK - Seller Financing Agreement

Loan Type
--Select--

Back
Proceed To Missing Information

Loan Type: --  
Loan Purpose: --Select--  
Loan Amount: --  
Appraised Value: --  
LTV/CLTV: --  
Rate: --

--Select--  
Conventional  
FHA  
Within Reach FHA  
Reverse / HECM Mortgage  
Reverse Golden Equity  
CAFA Platinum FHA DAP  
CAFA Platinum VA DAP  
CAFA Platinum USDA DAP  
CAFA Platinum Conventional DAP  
SETH MYHome Plus FHA  
SETH MYHome Plus VA  
SETH MYHome Plus USDA  
GSFA FHA Standard DAP  
GSFA FHA Select DAP  
GSFA FHA Assist DAP  
LINK - Seller Financing Agreement  
LINK Convertible Lease

Loan Purpose  
Loan Type
--Select--

Select "Loan Purpose"

Select "Loan Type"

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LHFS SubmitthroughDash 4/5/2024

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Review outstanding conditions:

TPO / Loan Summary

Fish, Phil LTV 60.241% FICO -- 5.500% DTI 11.105% / 12.476% FTC (-\$77,145.00)

**Phil Fish**

3096 Plaza Blanca  
SANTA FE  
Address

Lead - New  
Loan Status

Loan Number

Wholesale  
Channel

**Borrowers(1)**

Fish, Phil  
3096 Plaza Blanca Phil@test.com  
(M) (111) 111-111

**Lead - New**  
Loan Status

**Outstanding Tasks**

**11**

**Click on the red numbers to review outstanding conditions**

**Loan Details**

Review URLA by clicking on "URLA 2020" and edit as needed.

TPO / URLA

Fish, Phil LTV 60.241% FICO -- 5.500%

**Phil Fish**

3096 Plaza Blanca  
SANTA FE  
Address

Lead - New  
Loan Status

Loan Number

Wholesale  
Channel

**Import Export ...** Editing Borrower: Phil Fish

**1. Borrower Information** DTI (front/back): 11.105% / 12.476%

**Fish, Phil**

**1a. Contact Info**

FIRST NAME Phil	MIDDLE NAME	LAST NAME Fish	SUFFIX
E-MAIL Phil@test.com	SECONDARY E-MAIL	CELL PHONE (111) 111-1111	
DATE OF BIRTH 19/1985	CITIZENSHIP US Citizen	CREDIT REF #	
	# OF DEPENDENTS 0		

Is there a person who is not your legal spouse, but who currently has real property rights ☐ Yes ☒ No

**Loan Summary**

**URLA 2020**

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

**Edit URLA by clicking "URLA 2020"**

**Pay special attention to yellow notifications, clear them if possible by completing necessary data**

## Submission Screen

Upload applicable documents and click “Submit”

**Mia Toretto**

CONCORD  
1234 Test Street  
Address

Lead - New  
Loan Status

---  
Loan Number

Wholesale  
Channel

**Loan Summary**

**URLA 2020** ...

**Services** ...

**Fees**

**Pricing**

**Conditions**

**Submission**

**Additional** ...

**Items Required for Submission**

Search:

Detail	Borrower	Description	Request Date	Due Date	View File	Status
		Asset Documentation per AUS Findings (Showing Sufficient Funds)	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
		Purchase Contract and All Addendums	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
	Mia Toretto	Current Paystub	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
	Mia Toretto	Photo ID	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
	Mia Toretto	Upload Credit Report Dated Within 90 Days	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
	Mia Toretto	W2's Per AUS	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending

Showing 1 to 6 of 6 entries

**Data Validations**

**Passed**

**Disclosure Path**

Who is sending disclosures  
--Select One--

There is no key date for TRID Application Date

**Program**

Program Name	Rate	Locked?	APR	Price	Monthly P&I
	5.250				

**Final Submission Info**

**Final Notes**

**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 displays the DASH interface with a table of documents and two pop-up windows. The table has columns for Error, Detail, Borrow, Due Date, View File, and Status. It lists documents like 'Purchase Contract and All Addendums', 'Earnest Money Deposit - Showing', 'Cleared Through Bank', and 'Verbal Credit Authorization'. Red callouts with numbers 1 and 2 point to green arrow buttons in the 'Detail' column. Callout 1 says 'Utilize green arrow upload button to upload documents'. Callout 2 says 'Need to create a form? If applicable, click on the green arrow upload button to generate form.'.

Below the table, two windows are shown. The 'Task Information' window (labeled A) has a 'Generate Document' button and a 'Start Document Generation' button. The 'Generate Document Template' window (labeled B) has a 'Verbal Credit Authorization Date' field and 'Finish & Generate Doc' buttons. Red arrows point from callout A to the 'Start Document Generation' button and from callout B to the 'Finish & Generate Doc' button.

# SUBMIT LOAN THROUGH DASH

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

