

FOLLOW THE PROCESS BELOW FOR DPA PROGRAMS

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 'New Application' interface in the TPO system. The 'File Import' tab is active, showing a yellow box with a cloud icon and the text 'Drag and drop a file here or click'. Below this, the 'Choose The Channel' section has a 'Channel' dropdown set to 'Brokered' and a 'Company' dropdown set to 'Fake External Company'. The 'Choose The Contacts' section shows 'TPO LO' and 'TPO Processor' both set to 'Johnson, Christina'. At the bottom, a blue button labeled 'Process MISMO File' is visible. Red arrows and numbered callouts (1-4) indicate the sequence of steps: 1. Select 'Import MISMO 3.4 (xml)' in the top navigation; 2. Select 'Brokered' in the Channel dropdown; 3. Confirm the Company and Contacts; 4. Click the 'Process MISMO File' button.

Uploading Loan – Review Data

Please note: It's important to select the correct Loan Purpose and Loan Type to ensure the appropriate submission requirements are triggered and the correct lock request form is generated.

1. Loan Purpose - Select applicable purpose
2. Loan Type - Select applicable type (Conventional, FHA, VA, or USDA) 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

A window will open displaying a checklist. Follow the prompts and respond to each question as directed. The CAFA Platinum program shown below is provided only as an example:

4 Select "Yes" if using particular DPA program and select "Next"

Upon confirmation, click "Finish"

REGISTERING AND LOCKING SPECIALTY DPA THROUGH DASH

To access the Specialty DPA Lock Request form, click the red “Outstanding Tasks” number or select “Conditions” from the left-hand menu.

Outstanding Tasks

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Click the red number to access the lock request.
This action will also display any required conditions.

Within the outstanding task items, locate “Lock Request Form” and select “Start.”

Conditions

Generic Conditions (8 of 8 Outstanding)

Start

Click “Start” to generate lock request form

Complete the lock request form as applicable. (The CAFA Platinum program shown is provided only as an example):

1. Enter Rate Requested
2. Enter percentage of DPA Assistance
3. Enter Second Mortgage Loan Amount
4. Enter Lowest Middle Credit Score
5. If any borrowers are a first-time home buyer click the toggle button.
6. Click Next

Task Document Generation Template

Complete the following:

1 Enter Rate Requested

1 Enter DAP Percentage (i.e., 2%, 5%)

1 Enter Second Loan Amount

1 Enter Lowest Middle FICO Score (CAFA Minimum 620)

☐ Mark Yes if Borrower is a 1st Time Homebuyer

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1/2 Next Cancel

REGISTERING AND LOCKING SPECIALTY DPA THROUGH DASH

****For Conventional Loans Only****

Answer the following questions only if they apply and the loan is a conventional loan. If they do not apply, no action is necessary; simply click “Finish & Generate Doc.”

1. Select applicable Income AMI amount
2. Select applicable loan amount
3. Click Finish & Generate Doc

Task Document Generation Template

****FOR CONVENTIONAL LOANS ONLY** SELECT INCOME AND LOAN AMOUNT / INCOME RANGE (SKIP IF NOT APPLICABLE):**

1 ☐ Mark Yes if income less than or equal to 80% AMI
☐ Mark Yes if income is greater than 80% AMI

2 ☐ Mark Yes if Loan Amount less than or equal to \$175,000
☐ Mark Yes if Loan Amount is greater than \$175,000

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[Back](#) 3 / 3 [Cancel](#) [Finish & Generate Doc.](#)

Lock Confirmation

User will receive a lock confirmation no later than 24 hours.
Registration and Lock must be completed by 5:00pm pacific to guarantee rate



LOCK CONFIRMATION

Loan Broker:	Sample	Loan Number:	487 447
Borrower Name:		Fax#	
Property Address:		Product Code:	GF30TRIOLINK3.5-000
City, State, ZIP:		Borr FICOS:	/ /
Loan Amount:	\$250,381.00	CoBorr FICOS:	/ /
Occupancy:	Investment	Sales Price/Appr.Value:	\$255,000.00
Property Type:	Single Family Dwelling	Cash Out Amount:	\$0.00
LTV/CLTV/HCLTV:	96.50% / 96.50% / 96.50%	Documentation:	Full
Loan Purpose:	Purchase	Lien Position:	1st Lien
Date Locked:	8/9/2023	Total Debt Ratio:	0.00
Rate:	7.000% Margin:	Caps:	
Prepay:	None	Index Name:	
Tax Impounds:	Y	Lock Expiration:	9/8/2023
Hazard Impounds:	Y	Net Buy Price:	99.250
Interest Only:	N/A	Base Price:	0.750

Accessing Lock Confirmation in DASH:

1. Click on: “Additional”
2. Click on: “Loan Docs”
3. Click on: Down Arrow next to “Lock Confirmation”

DPA DEMO

Wheat Ridge
3170 N Harlan St
Address

File Created
Loan Status

Loan Number
Correspondent
Channel

Loan Summary

URLA 2020 >

Services >

Fees

Pricing

Conditions

Submission

Additional 1 >

☐ Change of Circumstance

☐ Escalation History

☐ **Loan Docs 2**

☐ Internal Contacts

☐ Key Dates

☐ Loan Activity

Loan Image - Lock Confirmation

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