

## APPLICATION REQUEST

When counseling certificate & CA Pre-Disclosures (if applicable) are uploaded, application can be requested.

Log into broker [DASH](#) account

\* alternatively, application may be requested with this form: [Reverse Application Request](#)

## DASH PROCESS

**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
- ? L1. Property & Loan Info
- ? L2. Title Info
- ✘ L3. Mortgage Loan Info
- ✔ L4. Qualifying the Borr

Under “Loan Summary”, select “URLA 2020”. Fill out all applicable loan information on the URLA 2020.

When the URLA is completed, be sure to select “Save” in the upper right-hand corner.

- At a minimum, please complete the following sections:
  - 1-Borrower Information
  - 3-Real Estate Owned
  - 5- Declarations
  - 8- Demographic Information
  - 9- Loan Originator Info (Organization & Originator Information)

When URLA is filled out, go to loan dashboard and select “Outstanding Tasks”.

Loan Type	Loan Purpose	Refinance Purpose	Appraised Value	Loan Amount	Cashout Amount
Reverse / HECM Mortgage	Reverse Mortgage Refinance				
Subordinate Lien Amount	MRP/PM Amount	Total Loan Amount	LTV	CLTV	
Product	Term	Comp Type	Compensation	Rate	0.0% / 0.0% DTI Ratio

Locate “Reverse Mortgage: REQUEST for Initial Application and Disclosures” condition. Select the blue upload arrow in “Detail” column.

Detail	Borrower	Description	Request Date	Due Date	View File	Status
	-	Reverse Mortgage: REQUEST FOR Initial Application and Disclosures	2/21/24, 1:03 PM	2/21/24, 1:03 PM	N/A	Pending

Showing 1 to 1 of 1 entries

Select “Start Document Generation”.

**Task Information**

Description: Reverse Mortgage: REQUEST FOR Initial Application and Disclosures

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

Request Date: 02/21/2024 1:03PM

Due Days:  0  Due Date: 02/21/2024

Responsible Party: Gabriel, Lily

Condition:

Generate Document: **Start Document Generation**

Buttons: Cancel, Save

- Application request pop-up will appear. Confirm all information & select “Finish & Generate Doc” when completed.
  - Margin, origination, product type, etc. is provided in the proposal email
- When application is successfully requested, the condition will be cleared from the loan.
- LHFS team will generate & send out application package via method of delivery requested. An email will be sent out to broker when the application is sent out for e-signatures or available for wet signatures.

- Submission documents can be uploaded at this time. All applicable items on the condition screen must be uploaded, reviewed, and approved by LHFS in order to move to setup & processing.
  - [Access Broker Submission checklist](#)
  - To upload submission documents, select the blue upload arrow under “Detail” and “Add New File” in pop-up window.

Detail	Borrower	Description	Request Date	Due Date	View File	Status
	-	Reverse Mortgage: Fully executed application package	1/18/24, 7:14 AM	1/18/24, 7:14 AM	N/A	Pending
	-	Reverse Mortgage: Purchase contract	1/18/24, 7:14 AM	1/18/24, 7:14 AM	N/A	Pending
	Doe, John	Reverse Mortgage: Income Documents - Current Award Letter for SS and Disability, Most recent pensions letter, or paystubs for wage earner	1/18/24, 7:14 AM	1/18/24, 7:14 AM	N/A	Pending
	Doe, John	Reverse Mortgage: Government ID - Proof of Birth (DL, Passport, Military ID, or other Government Issued ID Unexpired)	1/18/24, 7:14 AM	1/18/24, 7:14 AM	N/A	Pending
	Doe, John	Reverse Mortgage: Proof of social security number (SS Card, Medicare Card with SS #)	1/18/24, 7:14 AM	1/18/24, 7:14 AM	N/A	Pending
	-	Reverse Mortgage: Most Current Mortgage Statement (For All Properties Owned)	1/18/24, 7:14 AM	1/18/24, 7:14 AM	N/A	Pending
	Doe, John	Reverse Mortgage: Asset Documents	1/18/24, 8:03 AM	1/18/24, 8:03 AM	N/A	Pending
	Doe, John	Hazard Insurance Declaration Page	1/18/24, 8:04 AM	1/18/24, 8:04 AM	N/A	Pending

Showing 1 to 8 of 8 entries

Once all the necessary submission documents are uploaded, the loan will be submitted for review. Subsequently, the loan will be transitioned to setup and processing.