



# **Broker Job Aid on How to Submit a Loan**

**09.15.23**

## Home Page Widgets

Several Home Page Widgets are available for users to access key information. The following widgets are available:

- Recently Accessed Loans – This widget displays a list of recently accessed loans by a TPO. You can click on a loan in the list to view the loan.
- Company Announcements – The company announcements enable MassHousing to update you on valuable information including guideline changes. First time users should sign up for daily rate sheets.
- Lender Key Contacts – This widget enables Brokers to quickly access global Lender Contacts directly from the Welcome page.

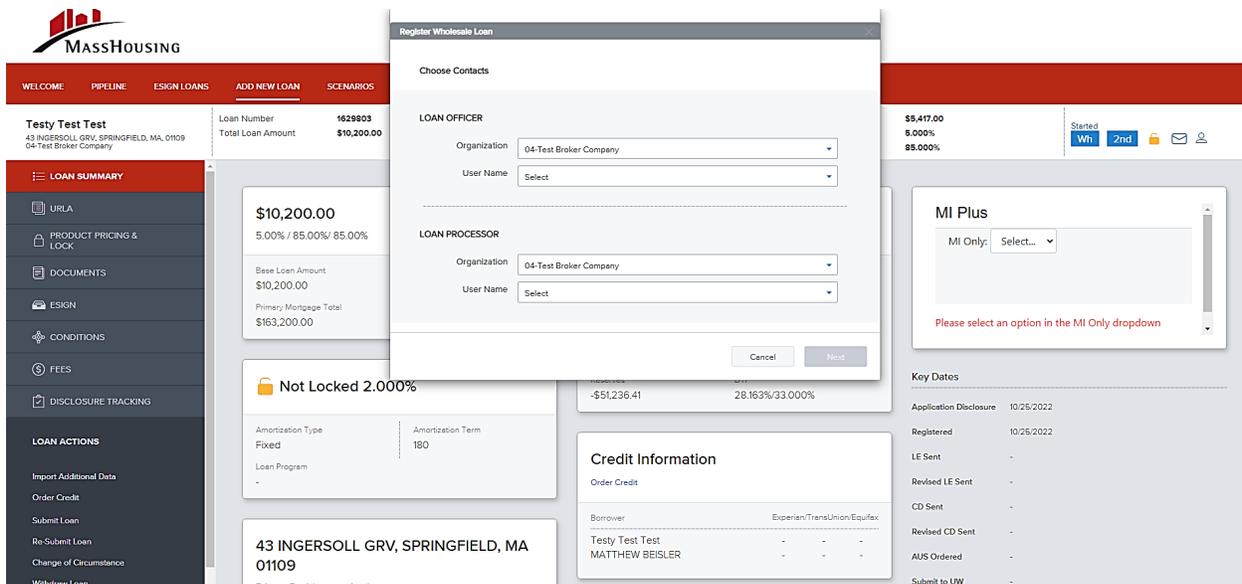
The screenshot shows the MassHousing dashboard interface. At the top left is the MassHousing logo. Below it is a red navigation bar with the following menu items: WELCOME, PIPELINE, E-SIGN LOANS, ADD NEW LOAN, SCENARIOS, QUICK LINKS (with a dropdown arrow), and DOCUMENTS. Below the navigation bar, there are three widgets arranged in a row:

- Recently Accessed Loans:** A widget with a title bar and a main area containing a grey box with the text "No data."
- Company Announcements:** A widget with a title bar and a main area containing two announcement items:
  - ~ MassHousing Announcements ~  
05/08/2023 09:12 AM
  - ~ MassHousing Daily Rate Sheet Sign Up! ~  
05/08/2023 09:10 AM
- Lender Key Contacts:** A widget with a title bar and a main area containing two contact entries:
  - Jeremy Meneses - Primary**  
617-854-1093  
jmeneses@masshousing.com
  - Manager of Wholesale Lending O - Anna Deburgo**  
adeburgo@masshousing.com

## Start A New Loan

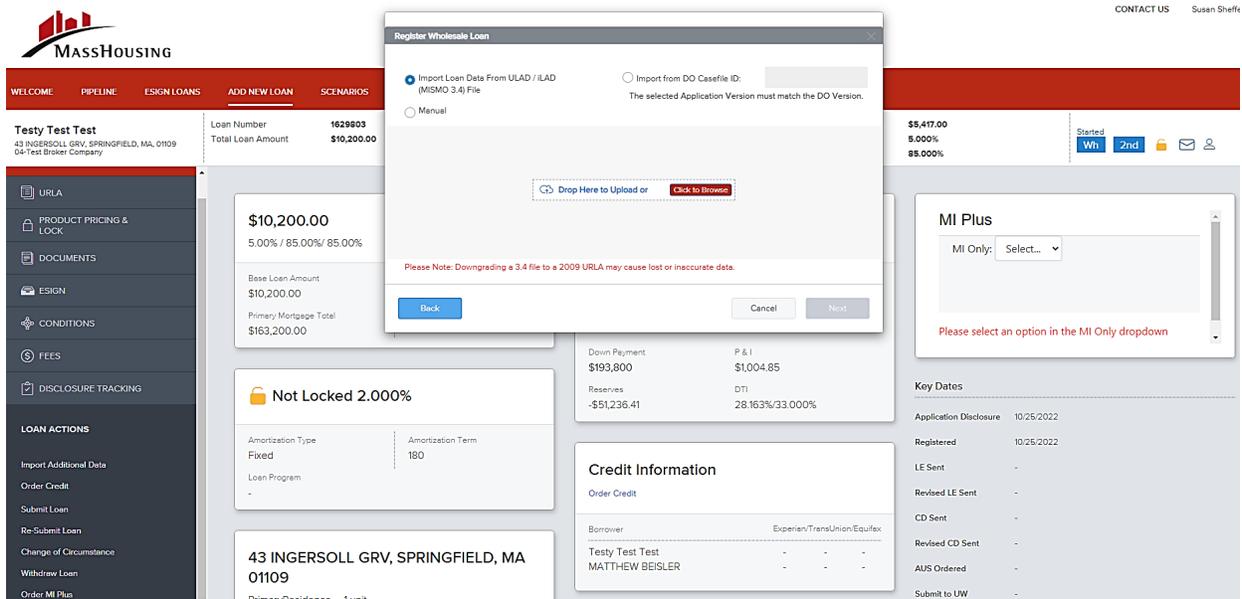
1. Click Add New Loan from the Dashboard to begin registering the loan.
2. In the pop-up window, select the loan officer and loan processor to which the loan will be assigned.

Note: Automated status updates are emailed to the file starter.



3. Click Next.

4. Click and Drag or Browse for your Fannie Mae 3.4 File. Click Next to import the data.



5. Review loan information and enter the borrower's Estimated Closing Date and Loan Documentation Type.

6. Click Next to proceed through the rest of the loan application. Click Save to Register your loan. This will generate the Loan Number once saved. Please see our [Broker Lock Desk Training](#) for additional detail on the lock process.

Note: Saving your loan does not mean submitting.

## **Upload Documents**

1. On the menu on the left, click the Documents link.
2. Utilize the submission checklists under Resources and Documents on our website to upload the minimum submission requirements (highlighted items) per program type.
3. The initial 1003 must be signed/dated by the broker within 24 hours of submission.
4. Drag and drop the document file to the document entry in the list or click the Browse for Files button to select a file to attach to the document entry. The document is now included in the Documents.

# Reissue Credit

1. Click Reissue Credit in the left-hand menu tab under Loan Actions.
2. Select the Credit Provider from the list provided.
3. Select Reissue Credit to pull a previously pulled report using the reports Reference Number.

**MassHousing** CONTACT U

WELCOME PIPELINE ESIGN LOANS ADD NEW LOAN SCENARIOS QUICK LINKS DOCUMENTS

**Testy Test Test**  
43 INGERMOLL GRYV, SPRINGFIELD, MA, 01109  
04 Test Broker Company

Loan Number	1629803	Note Rate	2.000%	Total Monthly Income	\$5,417.00
Total Loan Amount	\$10,200.00	Program	-	LTV	5.000%
		Decision FICO	-	CLTV	\$5.000%

Started Wh 2nd

Credit Provider:

New Credit Order  
 Reissue Credit

Reference Number:

Request Type:

Report Type:

Credit Bureaus:  Experian,  Equifax,  Trans Union

### Borrower Information

<b>Borrower</b> Testy Test Test	<b>Present Address</b> 24 SUMMER STREET, APT B NORTHAMPTON, MA 01060	<b>Co-Borrower</b> MATTHEW J BEISLER	<b>Present Address</b> 63A WOODMONT ROAD NORTHAMPTON, MA 01060
Date of Birth 08/19/1979		Date of Birth 08/17/1981	
SSN ***-3977		SSN ***-4937	

**LOAN ACTIONS**

Import Additional Data

**Order Credit**