How to Clear Conditions/Exceptions in the Lender Portal
Accessing Lender Portal

Login to TSAHC’s Lender Portal at www.tsm-online.org.

Don’t have login credentials?

• One person from each Lender’s organization will be designated the “TSAHC Administrator”

• The administrator is responsible for determining who within their company will have access and as well as the level of access each employee will have.

• TSAHC does NOT create login credentials.
Step-by-Step Loan Reservation & Compliance Procedures

1. Please use the Step-by-Step document to look for next steps, stages, and status updates: [Step-by-Step Loan Reservation and Compliance Procedures](#)
View Conditions/Exceptions

2. Click on the “Loan Status” tab and search for your loan.
3. Click on the “View” button.
4. View the HFA’s Conditions/Exceptions for items needed by TSAHC and/or Master Servicer for items needed by Lakeview Loan Servicing.
Clear Conditions/Exceptions

For TSAHC related items:

Again, please refer back to the document below for next steps, stages, and status updates -

“Step-by-Step Loan Reservation and Compliance Procedures”

- **Need to upload additional documents?**
  - Follow slides 8-14 entitled “Uploading Documents”
  - It will take our typical 1-2 business days to review and clear conditions

- **Need to submit Underwriter Certification?**
  - Follow slides 15-19 entitled “Underwriter Certification”
  - It will take our typical 1-2 business days to review and clear conditions

- **Need to submit fees for the MCC?**
  - Follow the instructions on steps 6 & 8 on the “Step-by-Step Loan Reservation and Compliance Procedures”.
  - MCC fees should only be sent to TSAHC for stand-alone MCC’s.
  - For combo DPA/MCC transactions, Lakeview will deduct the fees from loan proceeds. **DO NOT SEND PAYMENT TO TSAHC.**
Clear Conditions/Exceptions

For Lakeview related items:

- **View Module III training here:**
  https://attendee.gotowebinar.com/recording/1657769248281937154

- **Visit Seller Portal at:**
  www.lakeviewcorrespondent.com
Uploading Documents

• The Lender Portal allows lenders to complete and submit electronic documents.
  • All documents must be uploaded electronically.
  • No paper documents are required.

• Click on the “PDF Docs” button to access the electronic documents.
Uploading Documents

- All of the documents we require for that particular loan will be listed. Select/generate the Pre-Closing Checklist to help you determine documents required prior to closing. This is due 5 days prior to closing.

- If the applicable form requires a signature, the form must be completed, printed, saved as a PDF, and uploaded to the system.
Uploading Documents

- Go back to the “Loan Status” button. **NEVER** use the back arrows or it will log you out of the system.

- Click the “eDocs” button.
Uploading Documents

- Click the “Add New” button to upload a saved document.
Uploading Documents

• Click the “Click Here” button to access your computer files and select the document to upload. Click “Choose File”, find the document, and then click “Open”.

1. Click the “Click Here” button.
2. Choose file and click “Open”.
3. Select document and click “Open”.

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Image: Screen shots showing the process of uploading documents.
Uploading Documents

- Name the document you are uploading by choosing an option from the drop-down list under “Select a document from the predefined list”.
  - If you don’t see your document on the list, use the “Enter a customized document name” field to name the document you are uploading.

- Then you **MUST** click SAVE! This will save the uploaded documents to the “eDocs” section of the loan.
Uploading Documents

- Once all of the required documents have been uploaded to the Lender Portal, you will need to return to the “eDocs” button associated with the loan.
- You should see the uploaded documents under the appropriate section.
- IMPORTANT: Click on the “Submit” button associated with each section.

If you do not hit the “Submit” button, TSAHC will NOT know that you have uploaded any documents!
Underwriter Certification

- The Lender Portal allows lenders to complete and submit electronic documents.
  - All documents must be uploaded electronically.
  - No paper documents are required.

- Click on the “PDF Docs” button pertaining to the specific loan reservation to access the electronic documents.
Underwriter Certification

- Underwriters will select the “Underwriter’s Certification” Form. Then click “Generate Documents”.

![Screenshot of the Texas State Affordable Housing Corporation website showing the underwriter certification process.](image-url)
Underwriter Certification

- The UW Form will appear with many fields pre-populated. Complete and/or update any blank fields.
- Once this is complete, click on the “Upload Package” button at the bottom of the UW Form.
- This will automatically upload the Form to the “eDocs” section of that specific loan file.
Underwriter Certification

- Go back to the “Loan Status” button. NEVER use the back arrows or it will log you out!
- Click the “eDocs” button associated with the loan to find the recently uploaded Underwriter’s Certification Form.
Underwriter Certification

• You should see the uploaded UW Certification Form in the “Pre-Closing Compliance” section.
• IMPORTANT: Click on the “Submit” button of this section.
• If you do not hit the “Submit” button, TSAHC will NOT know that any documents were uploaded!
Contact Us

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