

Broker QuickStart Guide

1. Log into the site from the <u>Home Page</u>.

MassHousing Mortgage Broker Channel	Log in to eMassHousing
Welcome to MassHousing's Mortgage Broker Channel! And thank for you for participating in this pilot program. We are confident that working together, we can help more Massachusetts residents achieve their dream of owning a home.	Approved MassHousing Mortgage Brokers can log in to initiate MassHousing Mortgage loans and down payment assistance throug
On this page, approved mortgage broker partners will find links, documents and other resources related to MassHousing first mortgage loans and down payment assistance.	our secure system.
Resources for Mortgage Brokers	
MassHousing Broker Guide	F
MassHousing Product Matrix	Sign Up for Daily Rates
Quick Start Guide for Administrators: Set up and manage access for your organization's users User Guide: Help with submitting loans through MassHousing's secure system	Have MassHousing's Daily Home Ownershi Rates delivered directly to your inbox!
Homebuyer Education Providers	
MassHousing Staff Directory	LOG IN AND SUBSCRIBE
MassDREAMS Forms & Resources	
+ Show Forms	

- Enter the credentials assigned to you. To setup a new password or to update an expired or forgotten password, the user will need to create a Password Length of 16 characters including a minimum of: 1 Upper Case Letter, 1 Lower Case Letter, 1 Number and 1 Special Character. The new password expiration date will be 180 Days.
 - EX: username: john.smith@abclender.com

Temp password: This1sMyNewP@ssword

LOGIN	1
User Name	Ę
Password	0
Remember Me	

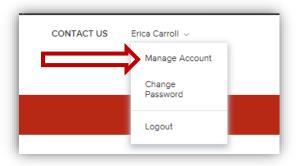




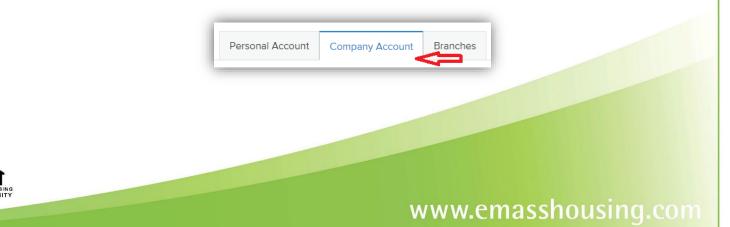
3. After login, you will land on the Welcome Page.

MassHousing		
LCOME PIPELINE ADD NEW LOAN SCENARIOS	Resources - Quick Links - Documents	
ecently Accessed Loans	Company Announcements	Lender Key Contacts
1002952 ABC Closing, Sigourney 5235,000.00, Conventional, ManufacturedHomeCondoPUDCoOp	2nd Company Announcement	Goretti Joaquim - Primary gjosquim@masshousing.com
	This is a test for the Company Announcemental 0105/2022 04:25 PM	Funding - HO Loan Operations HOLoanOperations@messhousing.com
		Underwriting - HO Loan Review HOLoanReview@masshousing.com
		Secondary Marketing - Lock Desk

- 4. Before a User can add, modify, or assign a Persona to another User, they <u>MUST</u> have been designated as an ADMIN for the lender. The ADMIN designation will allow them access to the "Manage Account" page on the site.
- 5. In the upper right-hand corner, click your name, then click Manage Account:



6. Select "Company Account" or "Branches" to display users. This is where you will be adding or changing a user account





Adding a New User

Follow the steps below to create new users for your Company while logged into the site. Again, you must have ADMIN privileges to add a new user account.

1. Scroll down to the "Company or Branch Contacts" and click "Add Contact"

Company Contacts	
Add Contact	ļ

- 2. Complete all *Required fields
 - a. When you get to Organization, please click "Choose"
 - i. Select the organization/branch you are creating this contact for, then click **SAVE**:

ganization	
 O1 - RK Test Mortgage 	*
• 02 - Test Company	
 02 - Test Company\03 - Test Company 	

3. If they are allowed to View/Access their team's loans and edit them, please make the appropriate selection, and then click **SAVE.**

View access to team's loans	
Edit team's loans	

4. Each new user requires Persona. Select desired Persona for this User by selecting the box to the left of the Persona Description. *The GetMICert Persona should not be used.*



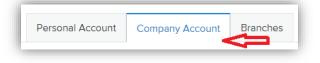


Persona Descriptions

- TPO GetMICert (generate an MI Certificate)
- **TPO Pending Persona (**temporary persona, no rights, this should be changed by broker Admin as soon as possible for each user)
- **TPO Admin** (designated by Broker, rights to add, delete, modify privileges for users)
- TPO Lock Desk (create loan, lock, scenario, purchase advice)
- TPO Loan Officer (create loan, scenario)
- TPO Operations (create loan, scenario, purchase advice)

Changing a Persona on an existing user

1. After you hit Manage Account, select the Tab Labelled Company Account to display users



2. Scroll down the page to the Company Contacts Section, find the user on the list that you want to Change and select **VIEW** to the right of their name.

Company C	ontacts					
						Add Contact
First Name	Last Name	Address	Business Phone	Email	Login Status	Personas
Oneida	Fuentes			ofuentes@masshousing.com	Enabled	1 View



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3. Click **EDIT** Information Button top right of window. A screen will appear scroll to bottom where you will see a blue button to Edit Persona

Edit Contact Information		×
*Email Address	testnondelegated@noemail.com	~
* First Name	Test	
K Middle Name		
*Last Name	Non Delegated	
Login Status	Enabled 🗸	
*Login Email Address	testnondelegated@noemail.com	~
NMLS ID		
Social Security #	###-##-#####	
Organization	03-Test TPO UCT Del	
	Use Company Address	
Address	2 Test St	
City	Boston	
עו State	Massachusetts 🔹	
\$ Zip	02114 -	
Business Phone	Ext.	
Business Fax	Ext.	
Cell Phone		
is *Personas	TPO Pending Persona , TPO Loan Officer , TPO	
b	Operations	
	Edit Persona View access to team's loans	
	✓ Edit team's loans	
Assigned AE	Goretti Joaquim	
Record Last Updated	6/10/21 6:42:55	
		Cancel Save



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4. Select desired Persona for this User by selecting the box to the left of the Persona Description. *The GetMICert Persona should not be used.*

Personas
TPO GetMICert
TPO Pending Persona
TPO Admin
TPO Loan Officer
TPO Lock Desk
TPO Operations

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- 5. Click **SAVE** button at bottom of Edit Contact Information screen. Then click **Back to Company Account**.

LCOME PIPEI	INE ADD NEW LOAN	SCENARIOS	RESOURCES ~	quick links \sim	DOCUMENTS	
Manage Account						
Personal Acco	unt Company Account	Branches				
ck to Company A Contact Details	.ccount					Edit Informati
Email Address	testnondelegated@noema	all.com		Branch DBA Name		Edit Informat
First Name	Test			Company DBA Name		
Middle Name				Address	2 Test St	
Last Name	Non Delegated			City	Boston	
Login Status	Enabled			State	MA	
Login Email	testnondelegated@noema	ail.com		Zip	02114	
Address				Personas	TPO Loan Officer, TPO Ope	rations
NMLS				Assigned AE	Goretti Joaquim	



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