MOHCD Lender Portal

Here you can upload documents against your relevant records

Lender Portal

User Guide

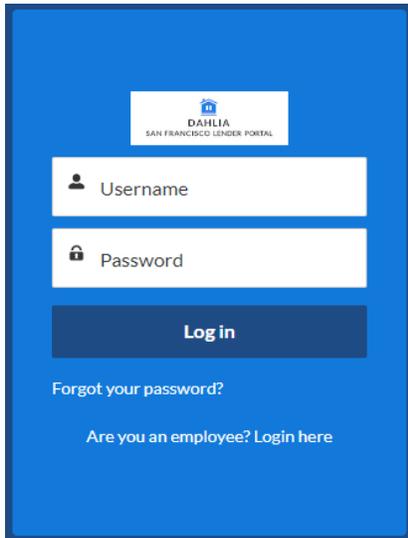October 24, 2022

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How to Log In

1. Access the MOHCD lender portal: https://mohcdsfhousing.force.com/LenderPortal

2. On the login screen, type in your **Username** and **Password** and click **Log in**.

3. Once you've logged in, the following landing page will appear.

ℹ️ **Login Tips:**
- The **Username** (email address) is not case sensitive.
- Your password may be reset at any time by clicking **Forgot your password?**
- For assistance with creating an account or finding a username, email mojdeh.majidi@sfgov.org

How to Create a New Lender Package

1. To create a new lender package for submission, click on the **New Upload Package** button.

2. Fill out the required fields (*) as shown below.

New Upload Package

* Submitter First Name ⓘ	* Submitter Last Name ⓘ
Katheryn	Test

* Submitter Email Address ⓘ	* Submitter Phone Number ⓘ
kat.mohcd@gmail.com	6286525932

* Company Name
Test Lender

* Borrower First Name	* Borrower Last Name
Susie	Testing

* Property Street Number	* Property Street Name
1234	Polk

Property Street Suffix	* Property Zip Code
St ▾	94103

Unit Number (if applicable)	* Transaction Type
2	BMR ▾

Secondary Transaction Type
--None-- ▾

Confirm

3. Select the **Transaction Type** that relates to your file.

* Transaction Type
   --None--

   --None--
   BMR
   Market-Rate
   Subordination
   MCC
   RMCC

   a. Select **BMR** for the purchase of a BMR unit.
   b. Select **Market-Rate** for the purchase of a market-rate property. Market-rate transactions include market-rate Downpayment Assistance Loan Program (DALP), City Second Loan Program (CSLP), and stand-alone Teacher Next Door (TND).
   c. Select **Subordination** for the refinance and subordination request.
   d. Select **MCC** for the stand-alone Mortgage Credit Certificate (MCC) request.
   e. Select **RMCC** for the Reissue Mortgage Credit Certificate (RMCC) request.

4. Select **Secondary Transaction Type** only if it's a BMR or a market-rate transaction combined with a **MCC** request. Otherwise, **None** is shown by default.

5. Once you have completed all required fields, click on **Confirm** to continue. The following page will appear.

ⓘ **Upload Tips:**
Before beginning uploading your documents, label your documents accordingly.
For example: Paystubs - date, 1008, 1003, 4506C, Tax Return - year...etc.

DAHLIA
SAN FRANCISCO LENDER PORTAL

Home | My Existing Uploads | New Upload

Katheryn Test
Test City and Partner

Upload
1234 Polk St Unit 2 - Susie Testing

Upload Files | **Submit For Review**

Submitter First Name	Submitter Last Name	Submitter Email Address	Submitter Phone Number	Status
Katheryn	Test	kat.mohcd@gmail.com	(628) 652-5932	Not Yet Submitted

Details

Company Name
Test Lender

Transaction Type
BMR

Name of Upload Package
1234 Polk St Unit 2 - Susie Testing

Secondary Transaction Type

∨ Submission Information

Submitter First Name ⓘ
Katheryn

Submitter Phone Number ⓘ
(628) 652-5932

Submitter Last Name ⓘ
Test

Submitter Email Address ⓘ
kat.mohcd@gmail.com

∨ Property Information

Property Street Number
1234

Unit Number (if applicable)
2

Property Street Name

Property Zip Code

Files

To upload files, use the "Upload Files" button above.
To submit this upload package to MOHCD, use the "Submit For Review" button above.

Incomplete submissions will not be reviewed by MOHCD.

📄 Uploaded Files   ⇅▾

No Files Found

5

6. To upload documents to your lender package, click on the **Upload Files** button located on the upper right-hand corner of the page.

7. The following pop-up window will appear for you to upload files.
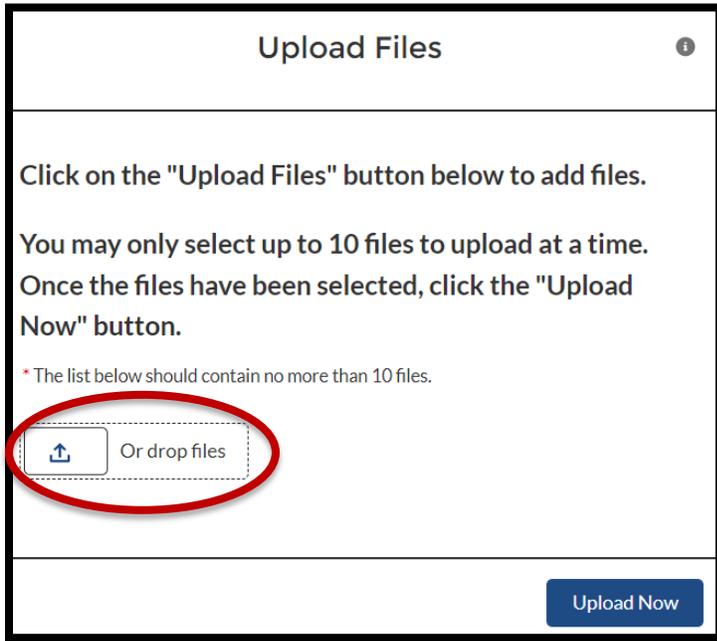
8. Click on the ⬆ **Or drop files** button above, a new window will appear for you to select up to 10 files from your device to upload at a time.

9. Once the files have been selected from your device, click **Open** to upload the selected files.
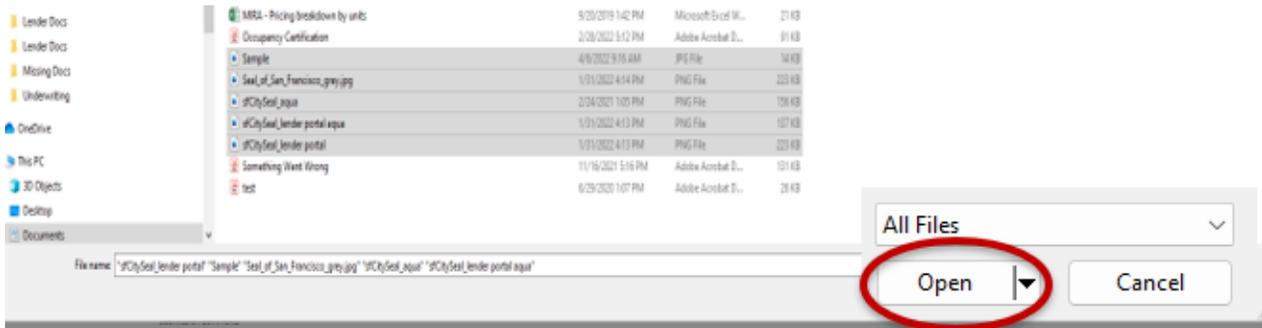
10. A new window will appear with the upload status for each file (see below).
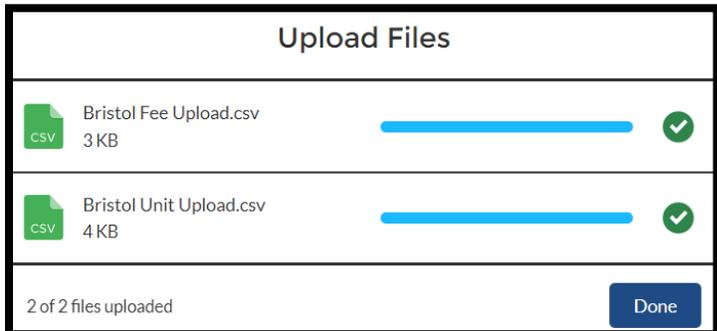
11. Once the upload is complete, a green check mark will appear to the right of each file. This means the files are ready to be added to the lender package. Click on **Done** to continue with the next step. *Do not close out of this window by clicking on X.*

12. The Upload Files window will display a list of the files that will be added to the lender package. *Again, you can only upload up to 10 files at a time. Do not close out of this window by clicking on X.*
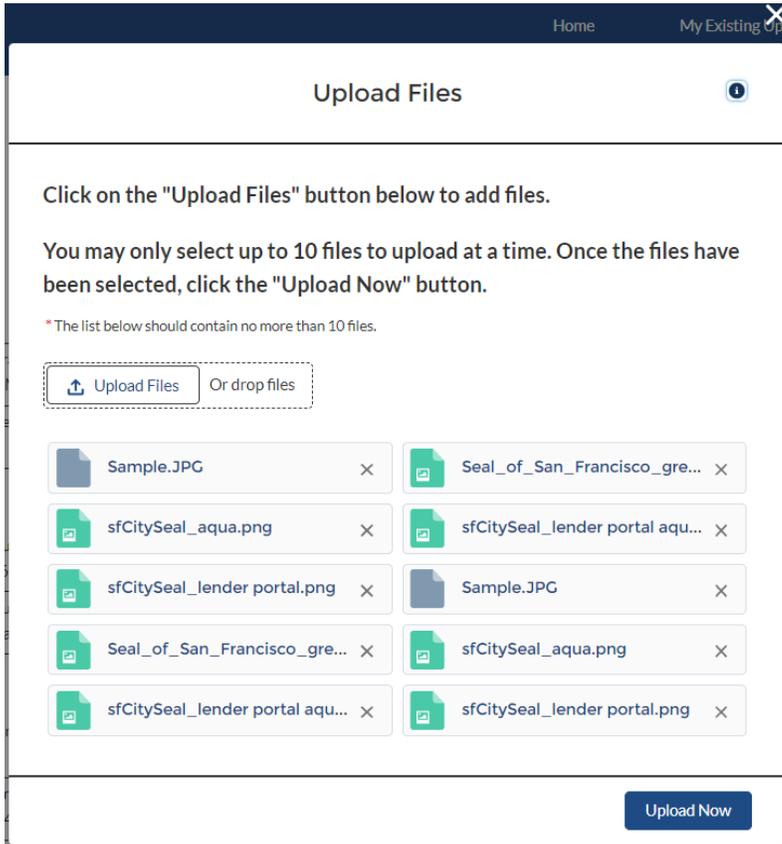
13. Once you have selected up to 10 files to upload, click on the **Upload Now** button to continue to the next step.

14. On the next screen, you will need to label the **File Type** for each file by hovering your mouth over the empty space under the **File Type** column on the right.

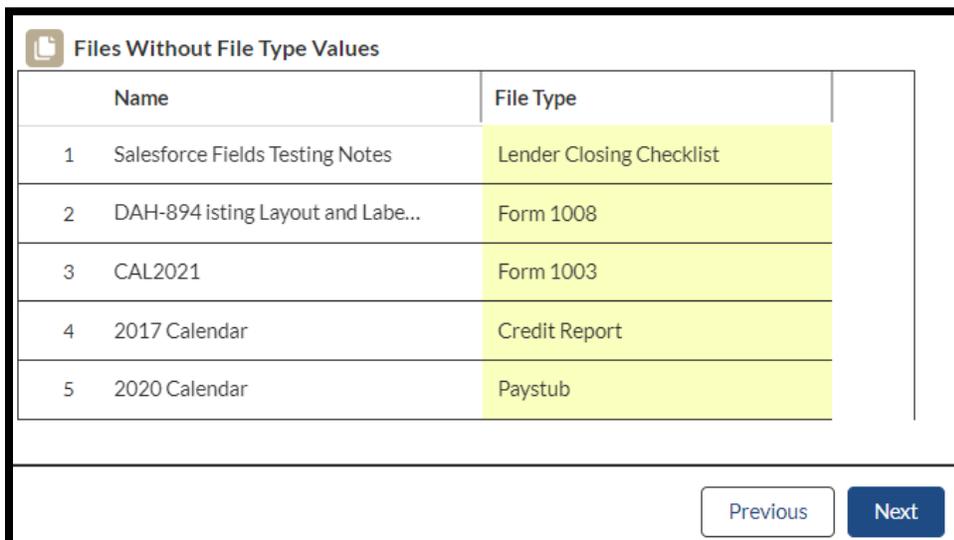15. Click on the pencil icon for the drop-down menu to select the **File Type**.
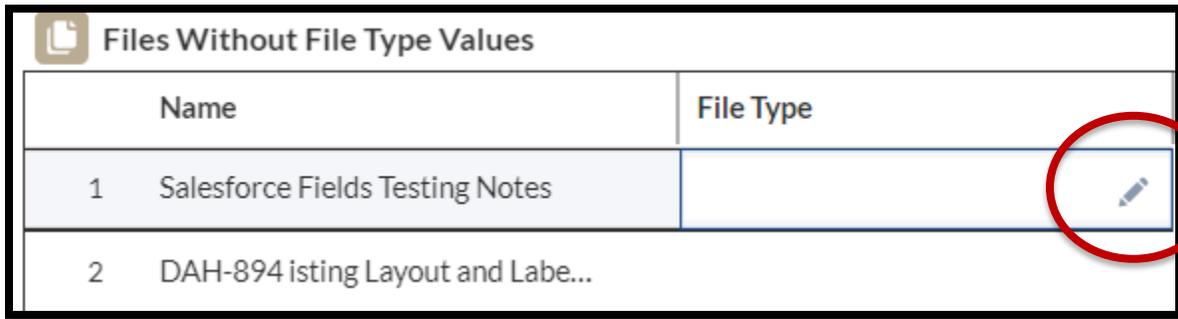
16. Select the file type for each file name. For example: Select "Lender Closing Checklist" for the lender checklist. *Make sure to select File Type for each document.*

17. Once the **File Type** has been selected for all of the documents, click on **Next** to continue.

18. Click on **Finish** on the next screen to continue.
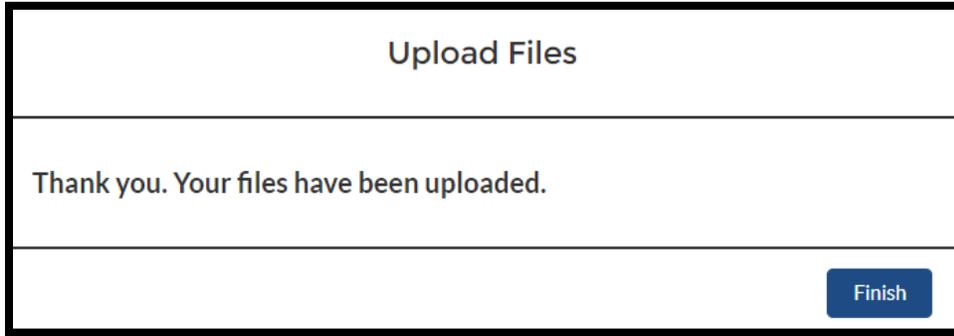
19. This will bring you back to the page for the lender package record. You will see a copy of the uploaded documents in the **Uploaded Files** box on the right side of the page. If you do not see your files in the **Uploaded Files** box, refresh the page.
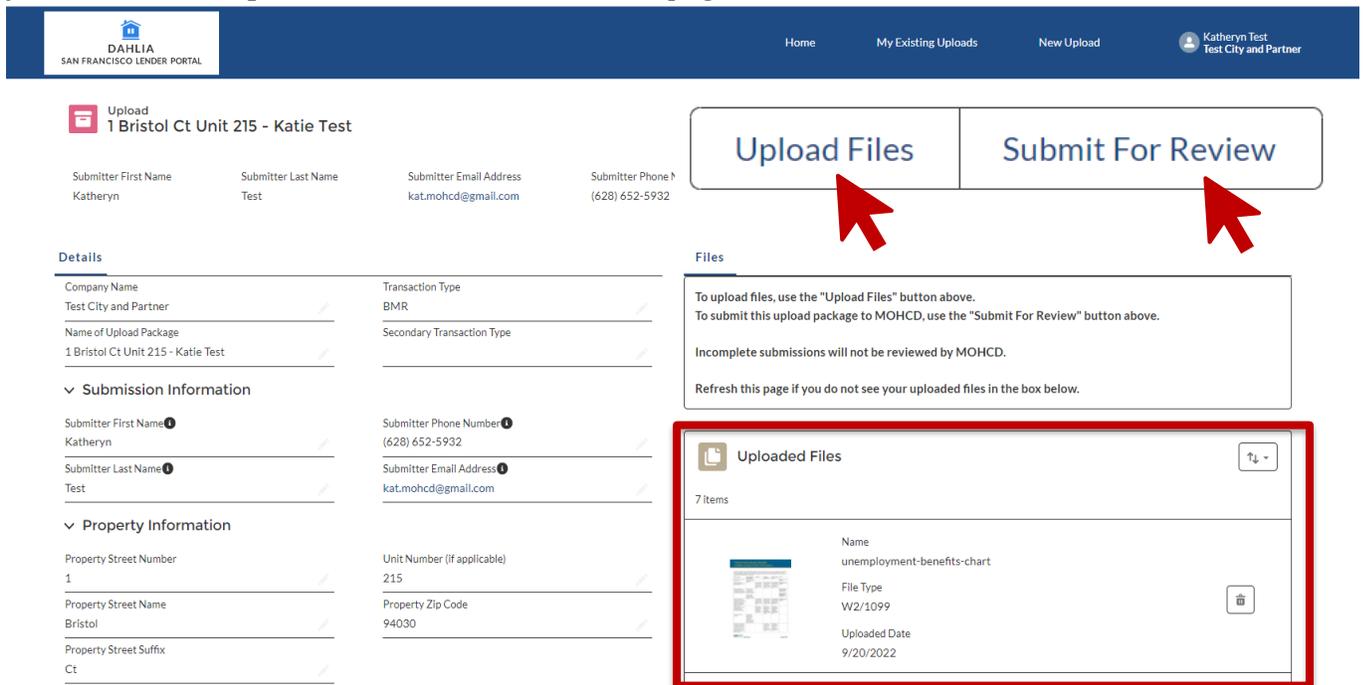
20. To upload additional files to the lender package, click on the **Upload Files** button.

21. If you would like to delete a file prior to submission, click on the delete icon 🗑 located next to each file.

22. Once all files have been uploaded and the lender package is ready for submission, click on the **Submit for Review** button. *Note: If you uploaded files but did not submit for review, MOHCD will not be notified of your upload.*

> ℹ **Submission Tips:**
> Please ensure that the lender package is complete before submitting the lender package to MOHCD for review. Incomplete lender packages will not be reviewed by MOHCD.

23. On the next window, you can type in your submission comments (if applicable) and click **Save** to submit the lender package to MOHCD for review.

24. Once the lender package has been submitted, a green banner (**Success: you have submitted this record to the internal MOHCD team for review**) will appear to confirm your submission, and the status for the lender package will change to show **Submitted**.
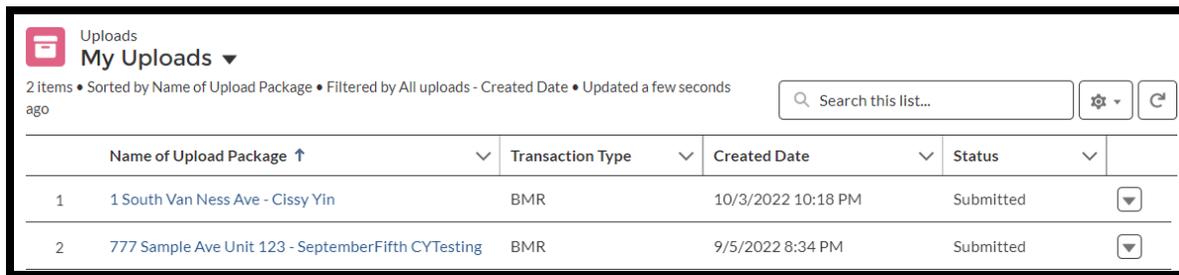

25. You should receive an email confirmation for the submitted lender package, and MOHCD will receive an email notification of the submitted lender package for review.

26. MOHCD will audit the lender package for completeness before the lender package will be placed in line for review. If the lender package is incomplete, a MOHCD staff member will notify the lender of the missing documents.

How to Add Documents to a Lender Package After Submission

i.   For Lender Packages Created in the New Lender Portal

1. Click on **My Existing Uploads**.

2. Under **My Uploads** section, you will be able to see the packages you submitted within the last 2 years.

3. Click the file name (hyperlink) under **Name of Upload Package** to select any individual lender package record.
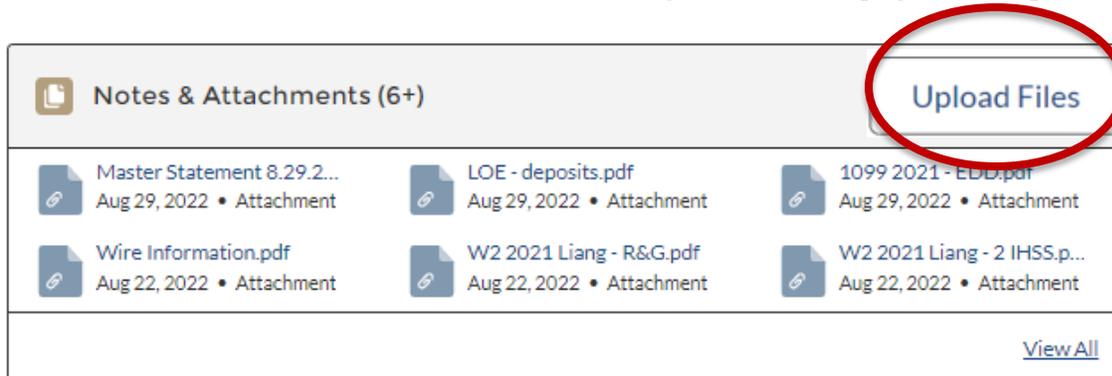

4. On the next page, click on the **Upload Files** button located on the upper right-hand corner of the page.

5. See Step 7 to Step 26 for the remaining steps as described above in How to Create a New Lender Package.

ii.   For Lender Packages Created in the Old Lender Portal

1. Click on **My Existing Uploads**.

2. Click on the file name under **Name of Upload Package** to select any individual lender package record.

3. In the **Notes & Attachments** box located on the right side of the page, click **Upload Files**.

4. Once the file(s) have been selected from your device, click **Open** to upload the selected documents. *Please note, you can only upload up to 10 files at a time.*

5. Once you have uploaded all the documents, email MOHCD to notify us of the upload. **Please note, this lender package was created in the old lender portal and will require you to notify MOHCD of any uploads.**

ⓘ Old Lender Portal Uploads Tips

- Lender packages created in the older Lender Portal do not send out notifications.
- To notify MOHCD of any uploads in the old Lender Portal, email mojdeh.majidi@sfgov.org.