



Correspondent Lending Reference Guide

TSAHC Web Administration



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1. Important Information

The Texas State Affordable Housing Corporation (TSAHC) requires that all users complete training before they are granted access to lock pre-closed loans in the TSAHC-branded area within LoanDock (TSAHC Lender Portal).

Note: Users with current access to LoanDock for locking closed loans need to complete the training in order to gain access to locking pre-closed TSAHC loans.

- If you had access to TSAHC's previous system (Emphasys), you must complete the updated modules to gain access to the new system.

Please visit this link to sign-up, create login credentials, and complete the TSAHC training Modules: <https://tsahc.talentlms.com/>

The **required** training includes:

- **Module 1 – The Basics:** This course is for Loan Officers and Underwriters. It covers program requirements, how to qualify a home buyer, how to make a reservation in our Lender Portal, and how to upload underwriter certification forms to certify DPA files.
- **Module 2 – Compliance, Closing, and Delivery:** This course is for processors, closers, and shippers. This module provides more in-depth training on the TSAHC Lender Portal, including how to upload underwriter certifications, compliance packages, and how to close and prepare loans for delivery to Lakeview Loan Servicing.

All users must complete the applicable module and forward their training completion certificate to the TSAHC web admin before receiving credentials to the TSAHC Lender Portal.



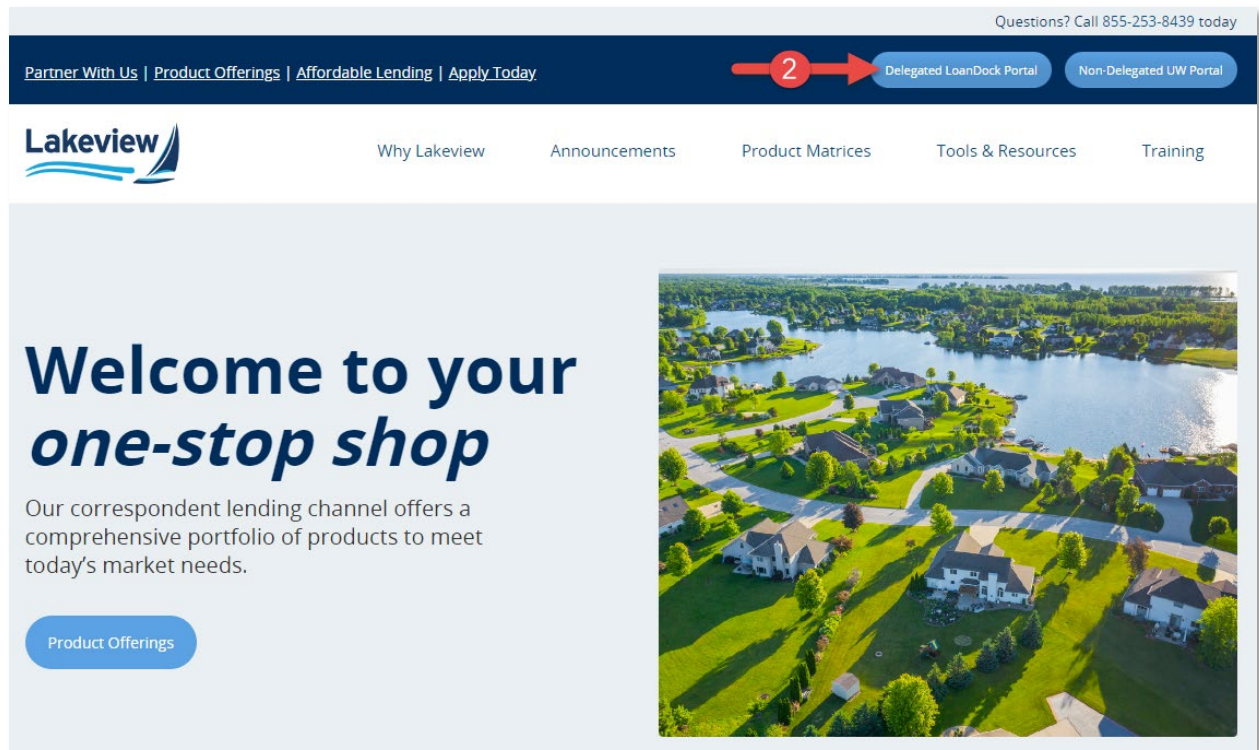
2. Client Site: Access and Login

Use the steps below to access the TSAHC Lender portal in LoanDock, the Lakeview Correspondent Delegated/Closed loan client portal.

1. Open your browser to lakeviewcorrespondent.com.

Note: We recommend you save this website address as a Favorite.

2. Click **Delegated LoanDock Portal** at the upper right corner of the website.



Note: Alternately, you can skip this step and use the following hyperlink to go directly to the LoanDock log in screen.

- <https://www.bayviewtpo.com/Client/Default.asp>

2. Client Site: Access and Login, continued

3. On the **LoanDock Login** page, enter your **E-mail Address** and **Password**.
4. Click **Logon**.

LoanDock Login

E-Mail Address:

Password:

[Password Retrieval / Account Lockout Reset](#)

Note: If you have difficulty logging in, please contact **Client Services** at ClientServices@Lakeview.com or 85-Lakeview (855-253-8439) for assistance.

Outcome: The **Daily Turn Times** screen displays.

Turn Times
Registration/Lock/Pricing
Current Rate Sheet
Closed Loan ▾
Non-Agency SLV Submission
Resources ▾
tsahc ▾
Admin ▾
User Profile
Logout

Daily Turn Times

All Turn Times are Approximate and Updated Daily

	Initial Review:	Condition Clearing:	Collateral Review:
Conv/Gov't/HFA	3 Days	2 Days	4 Days
Jumbo	9 Days	3 Days	4 Days
Non-Agency	7 Days	4 Days	4 Days

(In Average Business Days)

TURN TIMES ARE BASED ON RECEIPT OF LOAN IMAGES AND ULDD (.XML) DATA FILE (WHEN APPLICABLE)

Initial review: Number of business days from file receipt date to completion of the credit and compliance review

Condition Review: Number of business days from trailing document receipt date to the completion of the condition review

Collateral Review: Number of business days from collateral receipt date to the completion of the custodian's collateral review

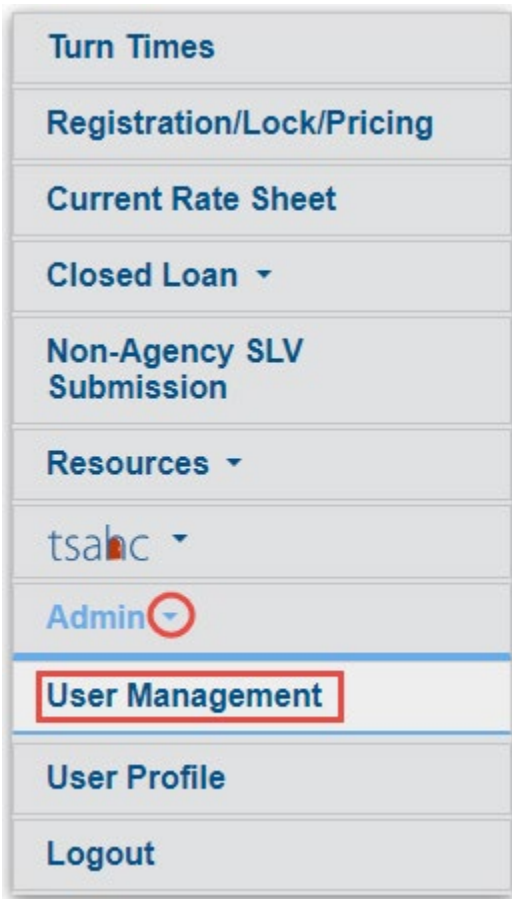
3. User Management

The individual(s) designated as your company's TSAHC Web Admin have website administrative access to our system. The TSAHC Web Admin performs these functions for your company:

- [Add new users](#)
- [View/edit the entire list of users](#)

Add New Users

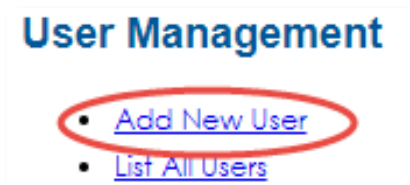
1. After logging into the system, click **Admin** and select **User Management** on the left navigation bar.



3. User Management, continued

Add New Users, continued

1. Click **Add New User**.



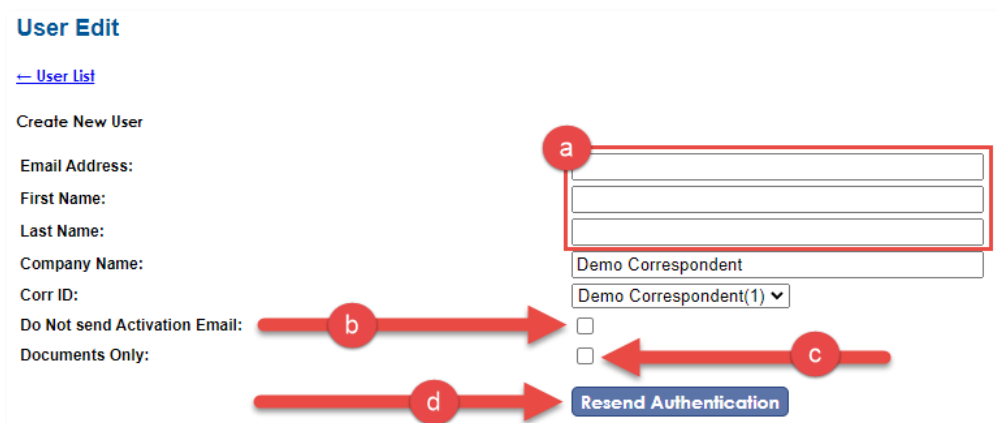
2. In the **User Edit** section of the screen, complete all applicable fields:

- a. Enter the new user's information:

- **Email Address**
- **First Name**
- **Last Name**

Note: The **Company Name** and **Corr ID** pre-populate with your company name.

- b. Check the **Do Not send Activation Email** checkbox to show the **Authentication URL** on the screen to copy and send to the new user rather than via an automated email.
- c. Check the **Documents Only** checkbox if you want the user only to have access to a scaled-down version of the left navigation bar without the **Loan Registration/Lock/Pricing, Deliver Loans/TDOCs, and Reporting** options.
- d. **Click Resend Authentication** to send a new automated email to a new user if their **Authentication URL** has expired.

A screenshot of the 'User Edit' form. The form has a title 'User Edit' and a back link '← User List'. Below the title, there is a section 'Create New User' with the following fields: 'Email Address:', 'First Name:', 'Last Name:', 'Company Name:', and 'Corr ID:'. The 'Company Name' and 'Corr ID' fields are pre-populated with 'Demo Correspondent' and 'Demo Correspondent(1)' respectively. There are two checkboxes: 'Do Not send Activation Email:' and 'Documents Only:'. A red box labeled 'a' highlights the 'Email Address' field. A red arrow labeled 'b' points to the 'Do Not send Activation Email' checkbox. A red arrow labeled 'c' points to the 'Documents Only' checkbox. A red arrow labeled 'd' points to the 'Resend Authentication' button.

3. User Management, continued

Add New Users, continued

Note: Here you will see two tables granting access to different areas within LoanDock, **User Access Information** and **HFA User Access**.

User Access Information

Job ID	Description	Client Access	Registration/Lock Access	Rate Sheet Access
6033	BayView/Lakeview Closed Loan	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
7303	Pricing Engine		Seller User	

HFA User Access

HFA	Client Access	Registration/Lock Access	Approved Loan Officer	Only HFA Access
TSAHC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. There are multiple levels of access within the system. Use the table below to determine the correct selections for your user.

Table	User Access Information		HFA User Access			
	Client Access	Registration / Lock Access	Client Access	Registration / Lock Access	Loan Officer	Only HFA Access
Loan Officer name selection at lock	X				X	X
Loan Officer with TSAHC Registration/Lock and Pre-Close Pipeline access	X	Seller User	X	X	X	X
Loan Officer with TSAHC and Lakeview Lock and Pipeline access	X	Seller User	X	X	X	
Other User access for TSAHC Registration/ Lock and Pre-Close Pipeline only	X	Seller User	X	X		X
Other User access for TSAHC and Lakeview Registration/Lock and Pipeline access	X	Seller User	X	X		
Other User access for Pre-Close TSAHC Pipeline access only	X		X			X
Other User access for Pre-Close TSAHC Pipeline and Lakeview Closed Loan Pipeline access	X		X			

Note: Every user must be granted **Client Access** in the **User Access Information** table.

- **Only HFA Access** hides all non-TSAHC options from the user.



3. User Management, continued

* Creating the Loan Officer name selection at the time of lock is an important step because to qualify as a participating lender or achieve Top Lender status with TSAHC, it is necessary for the loan officer to be linked to their loans. This process also enables TSAHC to generate production reports for Lender Rewards/Recognition.

4. Once you have made all the appropriate selections for the user, click **Save**.

Outcome: The new user automatically receives a **Credential Information for Bayview/Lakeview Client Site** email, which includes an authentication link to set their password.

You have been given access to the Bayview/Lakeview Client website.
Your login is your email address, [REDACTED]

Click on the link below to create a password. This link will expire in 14 days.

<https://www.BayviewTPO.com/UserAuthentication.asp?ID={4C2B07AF-7C1F-414F-AA57-205BE6AC8C0A}>

Your Activation Code

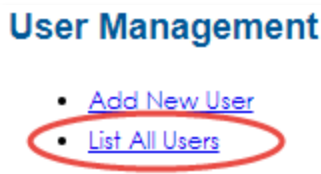
4C2B07AF-7C1F-414F-AA57-205BE6AC8C0A

You can access the Client site at:

<https://www.BayviewTPO.com/Client/bayview.asp>

List All Users

1. To view a list of all users at your company, click the **List All Users** link on the **User Management** screen:



Outcome: The user list displays and allows you to view all users at your company, as well as the access and roles granted to each user.

Email Address	First Name	Last Name	Company	Seller ID	Seller Name	Client Access	PE Access	CorrWeb Manager	HFA Access	Documents Only	Active
doconly@demo.com	Doc	Only	Demo Correspondent							6033	<input type="checkbox"/>
testingdoconly@1.com	Test	DocsOnly	Demo Correspondent							6033	<input checked="" type="checkbox"/>
training@1.com	USER	DEMO	Demo Correspondent	1	Demo Correspondent	6033		6033			<input checked="" type="checkbox"/>

3. User Management, continued

Editing a User

1. Click the user's email address.

Email Address	First Name
doonly@demo.com	Doc
testingdoconly@1.com	Test

2. Make any desired changes and click **Save**.

User Edit

[← User List](#)

Email Address:

First Name:

Last Name:

Company Name:

Corr ID:

Do Not send Activation Email:

Documents Only:

User Access Information

Job ID	Description	Client Access	Registration/Lock Access	Rate Sheet Access
6033	BayView/Lakeview Closed Loan	<input type="checkbox"/>		<input type="checkbox"/>
7303	Pricing Engine		None	



3. User Management, continued

Disabling a current user

1. To disable an existing user, click their email in the **User List**.

Email Address	First Name
doonly@demo.com	Doc
testingdoconly@1.com	Test

2. In the **User Edit** screen, click **Disable User**.

User Access Information

Job ID	Description	Client Access	Registration/Lock Access	Rate Sheet Access
6033	BayView/Lakeview Closed Loan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7303	Pricing Engine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Seller User ▼

Save Disable User

Outcome: A **User Successfully Disabled** message appears at the top of the screen once complete.

User Successfully Disabled

Note: To reactivate a user, add them as a new user.

Resetting a Password

Users can now reset their own password using the instructions below.

1. On the **LoanDock Login** screen, click **Password Retrieval/Account Lockout Reset**.

LoanDock Login

E-Mail Address:

Password:

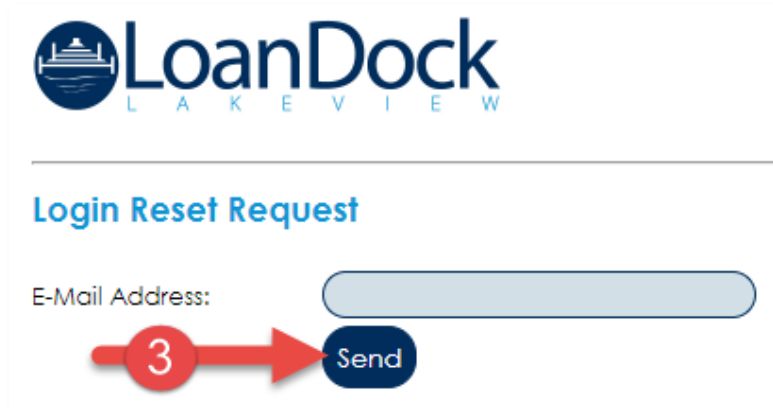
Logon

Password Retrieval / Account Lockout Reset

3. User Management, continued

Resetting a Password, continued

2. On the **Login Reset Request** screen, enter your **E-mail Address**.
3. Click **Send**.



LoanDock
L A K E V I E W

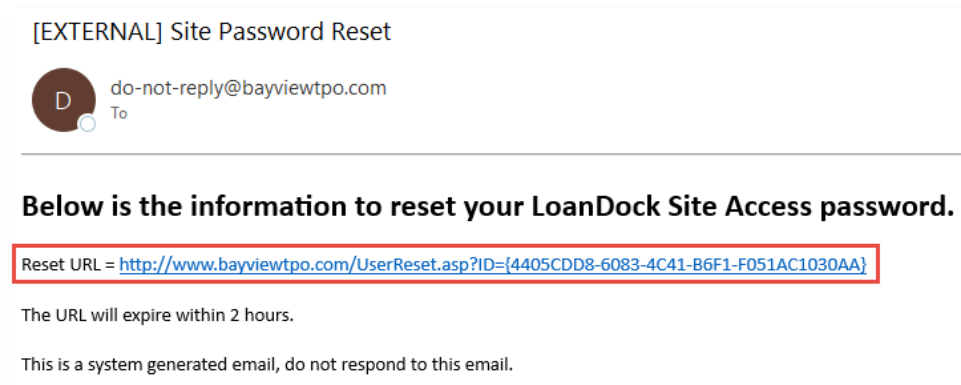
Login Reset Request

E-Mail Address:


3 → **Send**

Outcome: You will receive an email containing a password reset URL.

- The URL expires 2 hours after it was sent.
4. Open the email and click the **Reset URL** link.



[EXTERNAL] Site Password Reset

 do-not-reply@bayviewtpo.com
To

Below is the information to reset your LoanDock Site Access password.

Reset URL = <http://www.bayviewtpo.com/UserReset.asp?ID={4405CDD8-6083-4C41-B6F1-F051AC1030AA}>

The URL will expire within 2 hours.

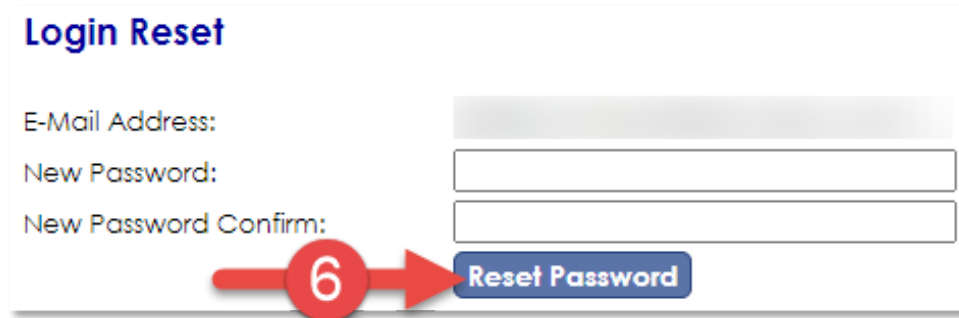
This is a system generated email, do not respond to this email.

5. Type the new password in the **New Password** field and again in the **New Password Confirm** field.

3. User Management, continued

Resetting a Password, continued

6. Click **Reset Password**.



The screenshot shows a web form titled "Login Reset". It contains three input fields: "E-Mail Address:", "New Password:", and "New Password Confirm:". Below the fields is a blue button labeled "Reset Password". A red arrow with the number "6" inside a circle points to the "Reset Password" button.

Outcome: You are routed to the **LoanDock Login** screen to enter your new credentials.

- Please note your new password, as the system does not save or have a record of them.