

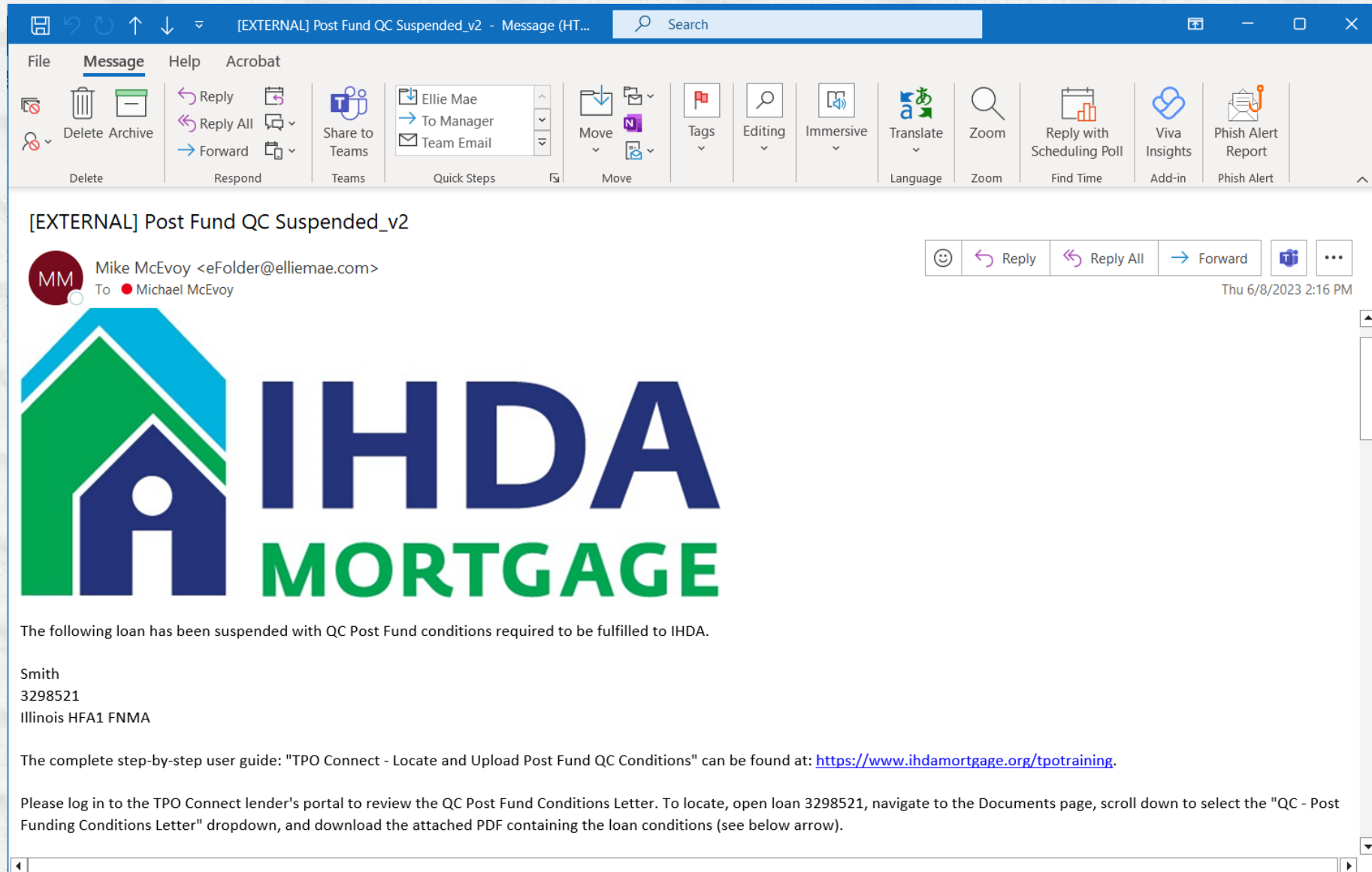


*TPO Connect - Locate and Upload  
Post Fund QC Conditions*

6/1/2023



# • Lender will receive Initial email Notification of Loan Selected with Post Fund Conditions



[EXTERNAL] Post Fund QC Suspended\_v2 - Message (HT...)


File Message Help Acrobat

Delete Archive Reply Reply All Forward Delete Respond Teams Quick Steps Move Tags Editing Immersive Translate Zoom Reply with Scheduling Poll Viva Insights Phish Alert Report

[EXTERNAL] Post Fund QC Suspended\_v2

MM Mike McEvoy <eFolder@elliemae.com>  
To: Michael McEvoy

Thu 6/8/2023 2:16 PM



The following loan has been suspended with QC Post Fund conditions required to be fulfilled to IHDA.

Smith  
3298521  
Illinois HFA1 FNMA

The complete step-by-step user guide: "TPO Connect - Locate and Upload Post Fund QC Conditions" can be found at: <https://www.ihdamortgage.org/tpotraining>.

Please log in to the TPO Connect lender's portal to review the QC Post Fund Conditions Letter. To locate, open loan 3298521, navigate to the Documents page, scroll down to select the "QC - Post Funding Conditions Letter" dropdown, and download the attached PDF containing the loan conditions (see below arrow).

# • Lender Logs Into TPO Connect Navigates to Pipeline

The screenshot shows the IHDA Mortgage TPO Connect web application interface. The top navigation bar includes the IHDA Mortgage logo, a 'CONTACT US' link, and a user profile 'mikE mcevoy'. Below the navigation bar are menu items: 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'SCENARIOS', and 'DOCUMENTS'. The 'PIPELINE' menu item is highlighted with a yellow arrow. The main content area is divided into two columns. The left column is titled 'Recently Accessed Loans' and contains a list of five loan entries, each with a loan ID, description, amount, and status. The right column is titled 'Company Announcements' and contains one announcement: 'TPO Connect Pilot Group' dated '01/02/2020 09:54 AM'. The footer contains contact information for IHDA Mortgage, including the address, phone number, and email, along with a 'Privacy Policy Statement' link and accessibility icons.

**IHDA MORTGAGE**

CONTACT US mikE mcevoy

WELCOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS

### Recently Accessed Loans

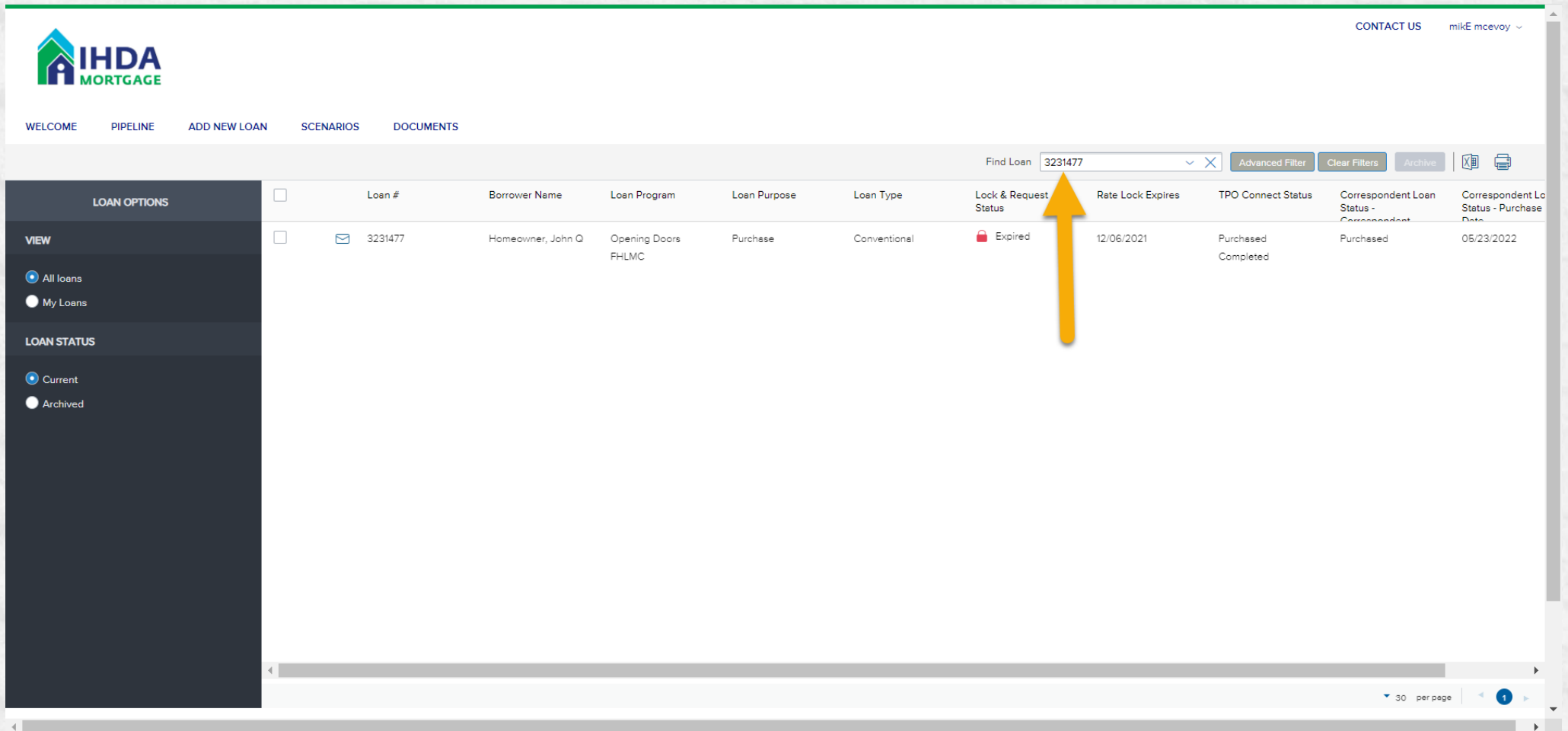
<b>3296237</b> DUPLICATE LOAN, DTI A & Spitzer, Barbara \$209,700.00, Conventional, Detached
<b>3296357</b> Duplicate 5.11, DTI \$209,000.00, Conventional, Detached
<b>3293527</b> QUAL TEST, DTI \$120,625.00, FHA, Detached
<b>3296167</b> Team JR, Lead test \$180,900.00, Conventional, Detached
<b>3283662</b> release 22.3, prod \$131,000.00, Conventional, Detached

### Company Announcements



**TPO Connect Pilot Group**  
01/02/2020 09:54 AM

111 E Wacker St, Chicago, IL 60601    Privacy Policy Statement  
Toll Free: 877 - 456 - 2656  
mortgage@ihda.org

# • Enter Loan Number from email



The screenshot displays the IHDA Mortgage web application interface. At the top left is the IHDA Mortgage logo. The top right corner contains a "CONTACT US" link and a user profile "mikE mcevoy". Below the logo is a navigation menu with "WELCOME", "PIPELINE", "ADD NEW LOAN", "SCENARIOS", and "DOCUMENTS". A search bar labeled "Find Loan" contains the value "3231477". To the right of the search bar are buttons for "Advanced Filter", "Clear Filters", and "Archive", along with icons for a document and a printer. A sidebar on the left contains "LOAN OPTIONS" and "LOAN STATUS" sections. The main content area is a table with the following data:

<input type="checkbox"/>	Loan #	Borrower Name	Loan Program	Loan Purpose	Loan Type	Lock & Request Status	Rate Lock Expires	TPO Connect Status	Correspondent Loan Status - Correspondent	Correspondent Lo Status - Purchase Date
<input type="checkbox"/>	 3231477	Homeowner, John Q	Opening Doors FHLMC	Purchase	Conventional	 Expired	12/06/2021	Purchased Completed	Purchased	05/23/2022

At the bottom right of the table, there is a pagination control showing "30 per page" and a page indicator "1".



- Open Loan &
- Navigate to Documents Tab

**IHDA MORTGAGE** CONTACT US mikE mcevoy

WELCOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS

**John Homeowner** 114 N WILLE ST, MT PROSPECT, IL, 600562451 Test Organization

Collateral Trac... Lender Case #: **DI-C01\_v3.4** 3231477 Total Loan Am... **\$140,000.00** VA Loan Sum... **710** Loan Type: **Conventional** Loan Purpose: **Purchase** Interest Rate: **3.375%** Loan To Value... **84.85% / 88.49%** **Limited Loan Access** Purchased Completed **C** **1st**

**LOAN SUMMARY**

- URLA
- PRODUCT PRICING & LOCK
- DOCUMENTS** ←
- PURCHASE CONDITIONS
- PURCHASE ADVICE

**LOAN ACTIONS**

- Import Additional Data
- Submit for Review
- Withdraw Loan

**John Homeowner**  
\$140,000.00

Loan Type Conventional	Document Type FullDocumentation
Lien Position FirstLien	Loan Purpose Purchase
Amortization Type Fixed	Purpose of ReFi -
Amortization Term 360	

**Purchase Approved**

Purchase Conditions	
Open	1
Ready for Review	0

**114 N WILLE ST, MT PROSPECT, IL 600562451**  
Primary 1 Unit Detached

Purchase Price \$165,000	Appraised Value \$165,000
-----------------------------	------------------------------

**Expired 3.375%**  
Final Price 102

Commitment Type Best Efforts	Lock Date 10/07/2021
Commitment Number -	Lock Expiration 12/06/2021

**Decision FICO 710**

**Key Dates**

Registered	09/20/2021
Submitted for Review	10/07/2021
Purchase Suspended	10/07/2021
Purchase Rejected	-
Purchased Approval	11/02/2021
Clear to Purchase	-
Purchase Date	05/23/2022
Cancelled Date	-
Withdrawn Date	-



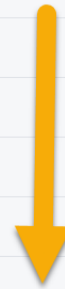
# • Scroll Down

The screenshot displays the IHDA Mortgage web application interface. At the top left is the IHDA MORTGAGE logo. The top right corner contains a 'CONTACT US' link and a user profile for 'mikE mcevoy'. Below the logo is a navigation menu with 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'SCENARIOS', and 'DOCUMENTS'. The main header area shows loan details for 'John Homeowner', including the address '114 N WILLE ST, MT PROSPECT, IL, 600562451', 'Collateral Trac...', 'Lender Case #: DI-C01\_v3.4', 'Loan #: 3231477', 'Alternate Loan...', 'Total Loan Am... \$140,000.00', 'VA Loan Sum... 710', 'Loan Type: Conventional', 'Loan Purpose: Purchase', 'Interest Rate: 3.375%', and 'Loan To Value... 84.85% / 88.49%'. A 'Limited Loan Access' warning is also present. A sidebar on the left contains menu items: 'LOAN SUMMARY', 'URLA', 'PRODUCT PRICING & LOCK', 'DOCUMENTS' (highlighted in blue), 'PURCHASE CONDITIONS', and 'PURCHASE ADVICE'. Below the sidebar is a 'LOAN ACTIONS' section with links for 'Import Additional Data', 'Submit for Review', and 'Withdraw Loan'. The main content area shows a table of documents with columns for document name, comments, and file upload options. A large yellow arrow points downwards from the middle of the document list towards the bottom of the page.

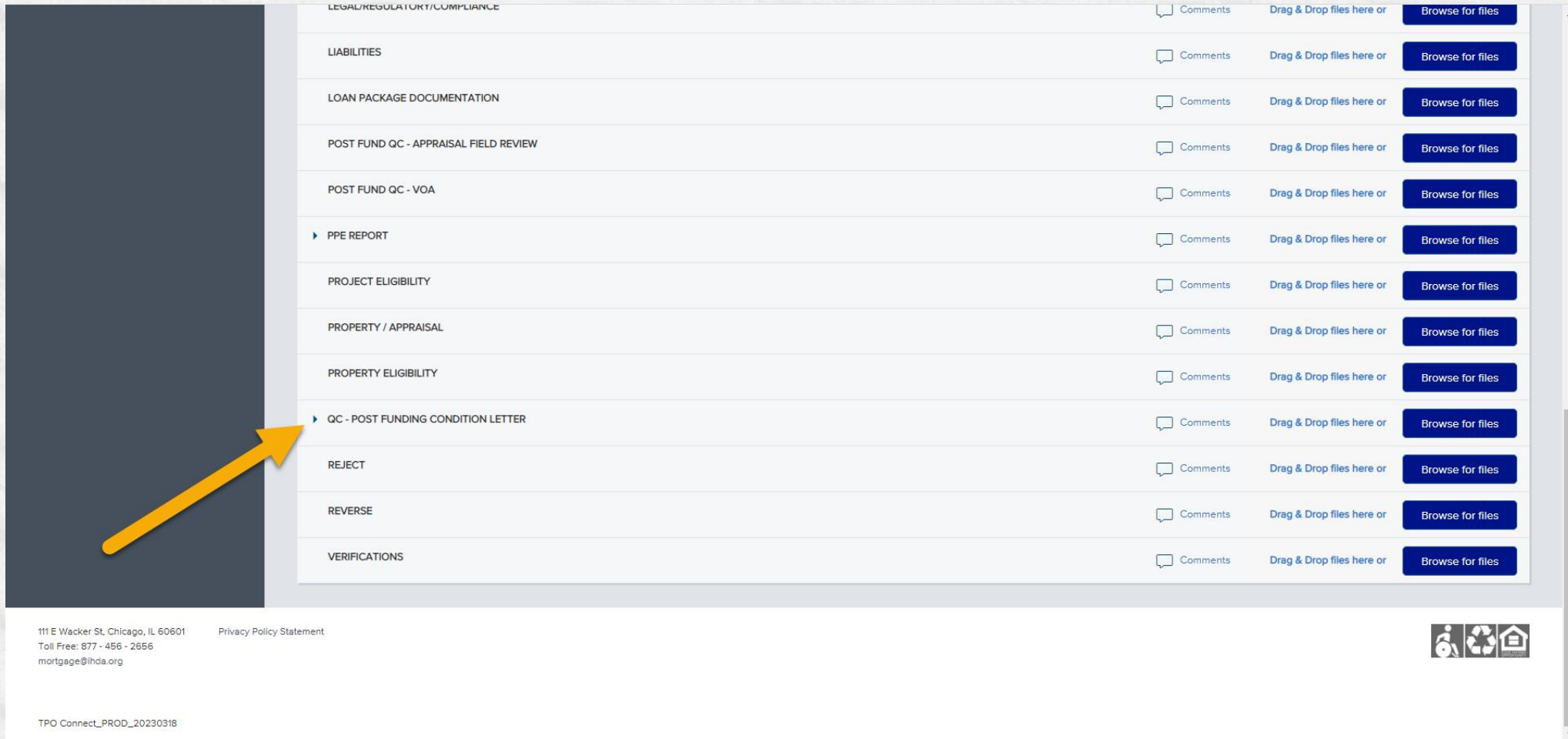
Max attachment size is 200 MB. [View Supported Files.](#)

Expand All Collapse All Print Fax Cover Sheet

All Borrowers			
1003 - URLA INITIAL	Comments	Drag & Drop files here or	Browse for files
John Homeowner, sefs ascsc			
ASSETS	Comments	Drag & Drop files here or	Browse for files
BORR AND MORT ELIGIBILITY	Comments	Drag & Drop files here or	Browse for files
CREDIT	Comments	Drag & Drop files here or	Browse for files
GOVERNMENT	Comments	Drag & Drop files here or	Browse for files
IHDA - DODD FRANK PTC	Comments	Drag & Drop files here or	Browse for files
IHDA DOCUMENTS	Comments	Drag & Drop files here or	Browse for files




- **Locate “QC - Post Funding Condition letter”**
- **expand by clicking on arrow**



LEGAL/REGULATORY/COMPLIANCE	Comments	Drag & Drop files here or	Browse for files
LIABILITIES	Comments	Drag & Drop files here or	Browse for files
LOAN PACKAGE DOCUMENTATION	Comments	Drag & Drop files here or	Browse for files
POST FUND QC - APPRAISAL FIELD REVIEW	Comments	Drag & Drop files here or	Browse for files
POST FUND QC - VOA	Comments	Drag & Drop files here or	Browse for files
▶ PPE REPORT	Comments	Drag & Drop files here or	Browse for files
PROJECT ELIGIBILITY	Comments	Drag & Drop files here or	Browse for files
PROPERTY / APPRAISAL	Comments	Drag & Drop files here or	Browse for files
PROPERTY ELIGIBILITY	Comments	Drag & Drop files here or	Browse for files
▶ QC - POST FUNDING CONDITION LETTER	Comments	Drag & Drop files here or	Browse for files
REJECT	Comments	Drag & Drop files here or	Browse for files
REVERSE	Comments	Drag & Drop files here or	Browse for files
VERIFICATIONS	Comments	Drag & Drop files here or	Browse for files

111 E Wacker St. Chicago, IL 60601  
Toll Free: 877 - 456 - 2656  
mortgage@lhda.org




Privacy Policy Statement



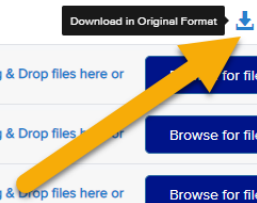

TPO Connect\_PROD\_20230318



- Document will appear
- Download the Document

LEGAL/REGULATORY/COMPLIANCE	Comments	Drag & Drop files here or	Browse for files
LIABILITIES	Comments	Drag & Drop files here or	Browse for files
LOAN PACKAGE DOCUMENTATION	Comments	Drag & Drop files here or	Browse for files
POST FUND QC - APPRAISAL FIELD REVIEW	Comments	Drag & Drop files here or	Browse for files
POST FUND QC - VOA	Comments	Drag & Drop files here or	Browse for files
▶ PPE REPORT	Comments	Drag & Drop files here or	Browse for files
PROJECT ELIGIBILITY	Comments	Drag & Drop files here or	Browse for files
PROPERTY / APPRAISAL	Comments	Drag & Drop files here or	Browse for files
PROPERTY ELIGIBILITY	Comments	Drag & Drop files here or	Browse for files
▼ QC - POST FUNDING CONDITION LETTER	Comments	Drag & Drop files here or	Browse for files
 Post Fund QC Condition Letter	90 KB	05/18/2023 2:28 PM	Mike McEvoy
		<a href="#">Download in Original Format</a>	 
REJECT	Comments	Drag & Drop files here or	Browse for files
REVERSE	Comments	Drag & Drop files here or	Browse for files
VERIFICATIONS	Comments	Drag & Drop files here or	Browse for files

111 E Wacker St, Chicago, IL 60601    Privacy Policy Statement  
Toll Free: 877 - 456 - 2656  
mortgage@ihda.org





- Letter Provides instructions on Page 1
- Scroll Down

Attachment-907bf583-f075-4a7a-8bd2-89c296399850.pdf 1 / 2 | 100% + | [Icons]

111 E. Wacker Drive  
Suite 1000  
Chicago, IL 60601  
312.836.5200

**ILLINOIS HOUSING  
DEVELOPMENT AUTHORITY**  
WWW.IHDA.ORG

---

Post fund QC selected: 05/18/2023

IHDA Loan #            3231477

Lender Name:            Test Organization


File Last Name:        tpo append on register

**Attention:**

The Post fund Quality Control review of the above referenced loan has been completed. The following page will list any outstanding conditions.


Please upload conditions through the TPO portal under the applicable category. (I.e. Asset conditions under Assets, Income conditions under Income, etc.)

If you have any questions, please contact [QualityControl@ihda.org](mailto:QualityControl@ihda.org) and reference this letter and/or loan number.



# • Page 2 shows all the current open Post Fund QC Conditions with Descriptions


Attachment-907bf583-f075-4a7a-8bd2-89c296399850.pdf | 2 / 2 | 100%



1



2



**ILLINOIS HOUSING  
DEVELOPMENT AUTHORITY**  
WWW.IHDA.ORG

111 E. Wacker Drive  
Suite 1000  
Chicago, IL 60601  
312.636.5200

---

**Condition 1**

Category: BORR AND MORT ELIGIBILITY      Subcategory: ELIGIBILITY

Defect: Loan amount is less than the minimum required

Comments: Borr and Mort Condition #1

**Condition 2**

Category: CREDIT      Subcategory: CREDIT CALC/ANALYSIS

Defect: Incorrect representative credit score delivered

Comments: Credit Condition #2

**Condition 3**

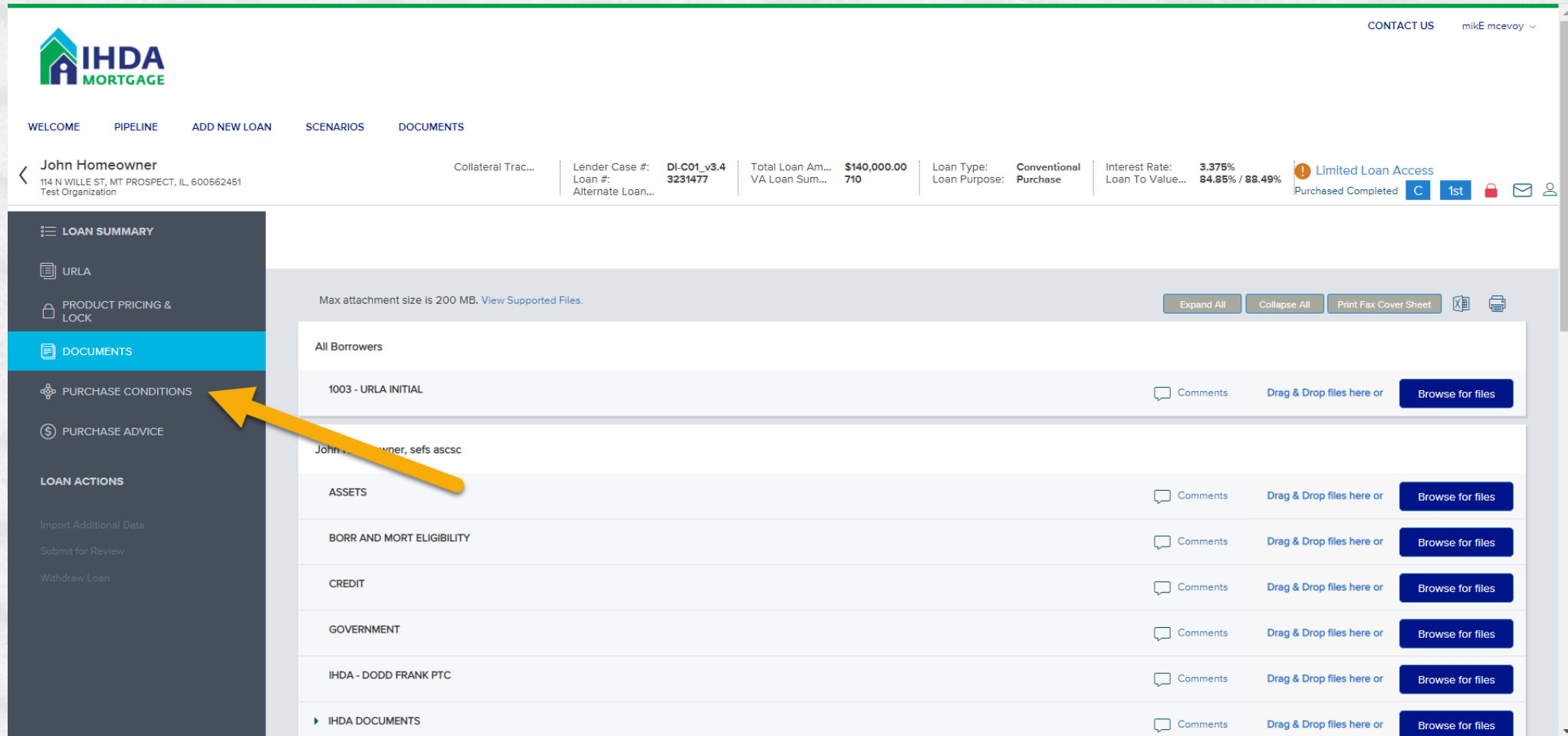
Category: ASSETS      Subcategory: ASSET ELIGIBILITY

Defect: Minimum borrower investment

Comments: Asset Condition #3



# • When Ready to Upload Condition Documents, Navigate to Purchase Conditions Tab



The screenshot displays the IHDA Mortgage web application interface. At the top left is the IHDA Mortgage logo. The navigation menu includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'SCENARIOS', and 'DOCUMENTS'. The main header area shows loan details for 'John Homeowner' (114 N WILLE ST, MT PROSPECT, IL, 600562451) and includes fields for Lender Case # (DI-C01\_v3.4 3231477), Total Loan Amount (\$140,000.00), Loan Type (Conventional Purchase), and Interest Rate (3.375%). A 'Limited Loan Access' warning is present. The left sidebar contains a menu with 'LOAN SUMMARY', 'URLA', 'PRODUCT PRICING & LOCK', 'DOCUMENTS' (highlighted in blue), 'PURCHASE CONDITIONS' (indicated by a yellow arrow), and 'PURCHASE ADVICE'. Below the sidebar, the 'All Borrowers' section lists document categories: '1003 - URLA INITIAL', 'ASSETS', 'BORR AND MORT ELIGIBILITY', 'CREDIT', 'GOVERNMENT', 'IHDA - DODD FRANK PTC', and 'IHDA DOCUMENTS'. Each category has a 'Comments' icon, a 'Drag & Drop files here or' prompt, and a 'Browse for files' button. A note at the top of the document area states 'Max attachment size is 200 MB. View Supported Files.' and there are buttons for 'Expand All', 'Collapse All', and 'Print Fax Cover Sheet'.

# • Change “Filter By” to choose “Post Closing”

The screenshot displays the IHDA Mortgage web application interface. At the top left is the IHDA Mortgage logo. The navigation menu includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'SCENARIOS', and 'DOCUMENTS'. The main header shows the user 'John Homeowner' and various loan details: Lender Case # DI-C01\_v3.4, Loan # 3231477, Total Loan Amount \$140,000.00, Loan Type Conventional Purchase, and Interest Rate 3.375% / 88.49%. A 'Limited Loan Access' warning is also present.

The left sidebar contains a menu with 'PURCHASE CONDITIONS' highlighted. The main content area features a 'FILTER BY' dropdown set to 'Type'. A dropdown menu is open, showing options: All, Prior to Approval, Prior to Docs, Prior to Funding, Prior to Closing, Prior to Purchase (checked), and Post Closing (highlighted in red). A yellow arrow points to the 'Post Closing' option.

Below the filter, a table lists loan conditions. The first row is 'IHDA - Dodd Frank PTC' with a status of 'New' and a date of '10/07/21'. An action button 'Ready for Review' is visible. Below the table, there are options for 'Comments', 'Drag & Drop files here or Browse for files', and 'Link Document to Condition'.

The footer contains contact information: 111 E Wacker St, Chicago, IL 60601; Toll Free: 877 - 456 - 2656; mortgage@ihda.org. It also includes a Privacy Policy Statement link and accessibility icons.



- *Once Uploads are Completed, Exit the Loan by selecting 'Welcome' from top banner*

The screenshot displays a web application interface for loan management. On the left is a dark sidebar with navigation options: DOCUMENTS, PURCHASE CONDITIONS (highlighted in blue), PURCHASE ADVICE, and LOAN ACTIONS (with sub-options: Import Additional Data, Submit for Review, Withdraw Loan). The main content area shows a table of loan conditions. Two conditions are expanded to show document upload progress:

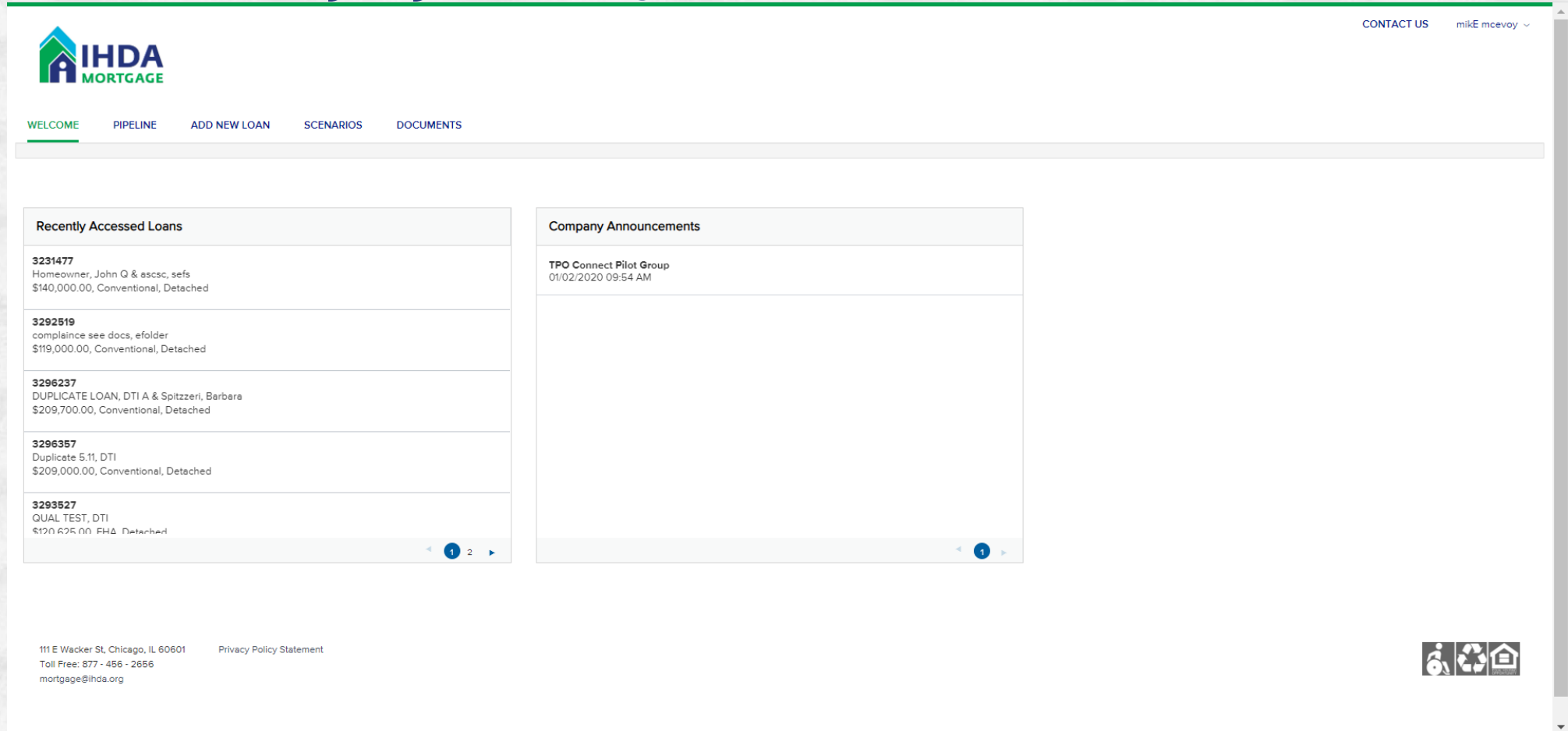
Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Action
	<b>Assets</b>		05/18/23		0	John Homeowner, sefs ascsc	New	05/18/23	0
	#3 condition description here								
	<b>Borr and Mort Eligibility</b>		05/18/23		0	John Homeowner, sefs ascsc	New	05/18/23	0
	#2 condition description here								

For the **Assets** condition, the 'ASSETS' section shows a document upload progress window for 'Asset Condition - T...' (109.26 KB) at 100% completion. A yellow arrow points to the 'Completed' status. Below it is a file entry for 'Asset Condition - Test.pdf' (112 KB, 05/18/2023 2:41 PM, mikE mcevoy). A 'Link Document to Condition' dropdown is also visible.

For the **Borr and Mort Eligibility** condition, the 'BORR AND MORT ELIGIBILITY' section shows a document upload progress window for 'Borr and Mort Con...' (109.26 KB) at 100% completion. A yellow arrow points to the 'Completed' status. Below it is a file entry for 'Borr and Mort Condition - Test.pdf' (112 KB, 05/18/2023 2:42 PM, mikE mcevoy).



- **Once at Welcome Screen, log out of TPO Connect,**
- **Any further condition requests will be emailed individually by IHDA QC team**



The screenshot shows the IHDA Mortgage TPO Connect interface. At the top left is the IHDA Mortgage logo. To the right are links for 'CONTACT US' and a user profile 'mikE mcevoy'. Below the logo is a navigation menu with 'WELCOME' (highlighted), 'PIPELINE', 'ADD NEW LOAN', 'SCENARIOS', and 'DOCUMENTS'. The main content area is divided into two columns. The left column, titled 'Recently Accessed Loans', lists five loan entries with their IDs, borrower names, and loan details. The right column, titled 'Company Announcements', shows a single announcement for the 'TPO Connect Pilot Group' dated 01/02/2020. The footer contains the address '111 E Wacker St, Chicago, IL 60601', a 'Privacy Policy Statement' link, contact information, and accessibility icons.

**IHDA MORTGAGE**

CONTACT US   mikE mcevoy

WELCOME   PIPELINE   ADD NEW LOAN   SCENARIOS   DOCUMENTS

### Recently Accessed Loans

<b>3231477</b> Homeowner, John Q & ascsc, sefs \$140,000.00, Conventional, Detached
<b>3292519</b> complince see docs, efolder \$119,000.00, Conventional, Detached
<b>3296237</b> DUPLICATE LOAN, DTI A & Spitzzeri, Barbara \$209,700.00, Conventional, Detached
<b>3296357</b> Duplicate 5.11, DTI \$209,000.00, Conventional, Detached
<b>3293527</b> QUAL TEST, DTI \$120,625.00, FHA, Detached

### Company Announcements

**TPO Connect Pilot Group**  
01/02/2020 09:54 AM

111 E Wacker St, Chicago, IL 60601   Privacy Policy Statement  
Toll Free: 877 - 456 - 2656  
mortgage@ihda.org

