

# *Creating Users in TPO Connect*



# Login To TPO Connect



**IHDA MORTGAGE**

CONTACT US Mike McEvoy

WELCOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS

**Recently Accessed Loans**

No data.

**Company Announcements**

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

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

- *Only users designated as TPO Managers can create new TPO Connect Users*



# Select Manage Account



**IHDA MORTGAGE**

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CONTACT US Mike McEvoy

- Manage Account
- Change Password
- Logout

Recently Accessed Loans

No data.

Company Announcements

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Privacy Policy Statement

- Can also update you current password from this menu



# Select Company Accounts



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Manage Account

Personal Account **Company Account**

**My Information** [Edit Information](#)

Email Address	mmcevoy@ihda.org	Branch DBA Name	
First Name	Mike	Company DBA Name	
Middle Name		Address	111 E Wacker Dr, Ste 1000
Last Name	McEvoy	City	Chicago
Login Status	Enabled	State	IL
NMLS		Zip	60601
SSN		Personas	TPO Manager
Business Phone		Assigned AE	IHDA Mortgage Systems
Business Fax		Record Last Updated	2/24/20 2:34:56
Cell Phone			

My Licenses

<https://8273154693.encompasspoconnect.com/0.0.3-9aa3c378-jw1cw35nhz/>



# Scroll down to Select Add Contact



Manager: USDA Originator: Yes

Assigned AE's: IHDA Mortgage Systems

AE Email Addresses: IHDA Mortgage Systems@ihda.org

### Company Contacts

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas		
Kyle	Nestlehut	111 E Wacker Dr, ...		knestlehut@ihda.org	Enabled	2	<a href="#">View</a>	<a href="#">Delete</a>
SheriAnn	Hannion	111 E Wacker Dr, ...		shannon@ihda.org	Enabled	2	<a href="#">View</a>	<a href="#">Delete</a>
Tracy	Grimm	111 E Wacker Dr, ...		tgrimm@ihda.org	Enabled	1	<a href="#">View</a>	<a href="#">Delete</a>
Mike	McEvoy	111 E Wacker Dr, ...		mmcevoy@ihda.org	Enabled	1	<a href="#">View</a>	<a href="#">Delete</a>

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### Company Licenses

State	License Type	License #	Start Date	End Date	Status	Last Updated
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# Add New User Information



First Name	Last Name	Address	Business Phone
Kyle	Nestlehut	111 E Wacker Dr, ...	
SheriAnn	Hannion	111 E Wacker Dr, ...	
Tracy	Grimm	111 E Wacker Dr, ...	
Mike	McEvoy	111 E Wacker Dr, ...	

State	License Type	License
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**\* = Required Fields**

**Blue Arrow:** Choose to allow TPO user to View or Edit other team's loan files

**Green Arrow:** Choose the User's Organization (corporate vs. individual branch)



# Select Organization



Contact Organization

Mike McEvoy

Organization

- Illinois Housing Development Authority - Test
  - Chicago Test Branch
  - Naperville Test Branch

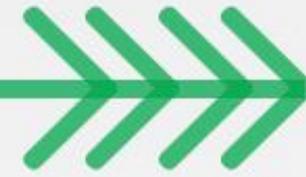
Your Selection: Illinois Housing Development Authority - Test/

Cancel Save

- Within Contact Organization you will have multiple options:
- 1) Just click 'Save' without selecting a branch, this will put the User in the Company Contacts (Blue Arrow: Current User Organization)
- 2) Select a branch (ex: Chicago or Naperville)
- This choice will impact User Access Rights (see next Slide)



# TPO Connect Access Rights



- **TPO Connect Hierarchical Access rights**
  - Company contacts (where TPO managers currently are) at the top level and then each branch (ex: Chicago or Naperville) is one level lower
  - Assuming The user is given View/Edit Access, they will be able to see every loan created by a user in their current location and below in their Pipelines
  - A Loan created in Chicago By LO#1 can be View/Edited by TPO Manager#1 because he is located in Company Contacts, one step above Chicago
  - However, LO#2 who was assigned to Naperville cannot see the Loans of LO#1 in Chicago, as they are on the same level, but different branches.
  - Ultimately, any user that will need to View/Edit all Company loans must be located in Company Contacts level



- **Access Rights can be edited after initial account creation by emailing:**  
**[Mortgage@IHDA.org](mailto:Mortgage@IHDA.org)**

# Add User Persona



- *TPO Manager has ability to create other users*
- *As of right now the TPO Loan Officer and TPO Processor are functionally the same, But as part of the pilot we are looking for feedback from our lenders if they would want a split/division in abilities or duties within the new portal*



# Click Save to Create User



The screenshot shows a web application interface. On the left, there is a sidebar with sections for 'Company Contacts' and 'Company Licenses'. The 'Company Contacts' section contains a table with columns for First Name, Last Name, Address, and Business Phone. The 'Company Licenses' section contains a table with columns for State, License Type, and License. The main content area is a 'Create New Contact' form. The form has several fields: \*Email Address, \*First Name, Middle Name, \*Last Name, Login Status (Enabled), NMLS ID, Social Security # (masked with ###-##-####), \*Organization (Choose), Use Company Address (checkbox), Address, City, \*State (Select), Zip, Business Phone, Ext., Business Fax, Ext., Cell Phone, \*Personas (Add Persona, View access to team's loans, Edit team's loans), Assigned AE (IHDA Mortgage Systems), and Record Last Updated (2/24/20 5:37:22). At the bottom right of the form, there are 'Cancel' and 'Save' buttons. A blue arrow points to the 'Save' button.

- Email with User login credentials will be sent out from: "Ellie Mae, Inc. Password Assistance" <[noreply@elliemae.com](mailto:noreply@elliemae.com)>





***Thanks for attending!***

***We appreciate your partnership!***

- ***Send any TPO Connect questions to:  
[Mortgage@ihda.org](mailto:Mortgage@ihda.org)***

