HOMEOWNERS MORTGAGE

BULLETIN CS-2018-12

DATE:	**APRIL 18, 2018**
TO:	**HOMEOWNERS MORTGAGE CUSTOMERS**
SUBJECT:	**** FINAL UPDATE ** ENCOMPASS TPO CONNECT SYSTEM MIGRATION**

HME B2B Mortgagebot Account Credentials	Your Mortgagebot account login credentials have been disabled. If you need assistance with previous submissions, please contact your Account Executive or Client Relations Representative.
TPO Connect Loan Access & Loan Numbers	You are now able to access any Mortgagebot active loan that was previously "in process" with underwriting or loans where Towne issued the clear to close prior to end of day Friday, April 13th, by logging on to Encompass TPO Connect. ***The Loan Number assigned in Mortgagebot will remain unchanged in TPO Connect.***
Condition Submittal	**Q:** How do I submit conditions on a migrated loan? **A:** Find the loan in your TPO Connect pipeline and follow the procedures for uploading documentation for underwriter review to the document placeholder labeled Wholesale: Conditions. Refer to this job aid for detailed instructions. TPO Wholesale - Submitting Conditions
Change of Circumstance Requests	**Q:** How do I request a changed circumstance LE on a migrated file? **A:** Find the loan in your TPO Connect pipeline and follow procedures for submitting a Change of Circumstance Request. Refer to this job aid. TPO Wholesale - Request COC LE Fee sheet: Wholesale Fee Sheet

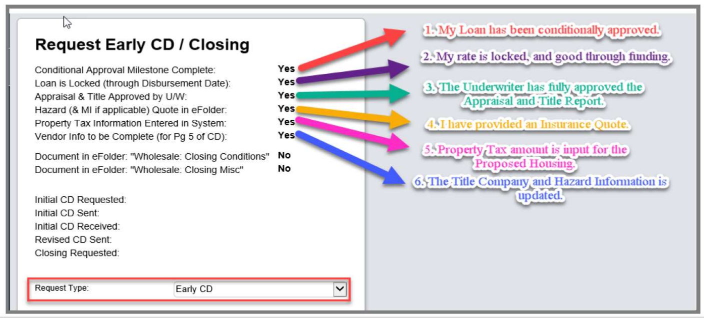
Early CD & Closing Requests

Q: How do I request an early closing disclosure and closing document request?
A: Find the loan in the TPO Connect pipeline. Access the Request Portal under Resources. Enter Loan Number, Borrower Last Name and Company NMLS Number.

Request Early CD

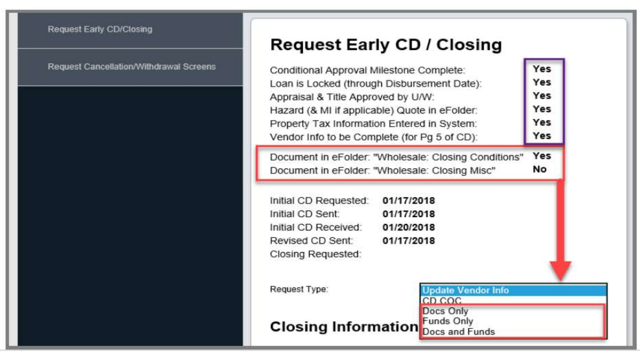
Click on Request Early CD/Closing tab. Check to make sure that the 6 conditions below state "Yes".

Step 1: Ensure you have all "YES"s for the Early CD Requirements.



Request Closing

Step 1: Ensure you have all your "YES"s for the Early CD Criteria AND at least one "YES" for "Wholesale: Closing Conditions", or "Wholesale: Closing Misc."



Examples of items to upload to "Wholesale: Closing Conditions", or "Wholesale: Closing Misc.":

- Homeowners Policy with updated Mortgagee
- Updated Payoff Statement
- Prelim CD
- Wiring Instructions, etc.

Step 2: Select your closing type:

- **Docs Only:** If you are only requesting the closing documents to be generated.
- **Funds Only:** If you are only requesting for the wire to be sent for closing.
- **Docs and Funds:** If you are only requesting the closing documents to be generated AND for the wire to be sent.

Step 3: Ensure ALL data entry fields with the red asterisk are completed (to include Wire Bank Information; or any COC needs in the Special Instructions box)

Step 4: Click Save/Request.
Refer to this job aid for detailed instructions: TPO Wholesale - Request Early CD/Closing

Requesting copies of documents	**Q:** How do I request copies of documents previously closed and funded on Mortgagebot? **A:** Email Lynn Key at lkey@americu.com with a description of the documents that you are requesting.

By working together, we WILL accomplish more! Thank you for your continued support and partnership.

We encourage comments, suggestions, and questions.

Contact your Account Executive or Client Relations Representative and he/she will share with management as appropriate & a timely response will be provided by your account executive or client relations representative.

The URL for TPO Connect is: https://connect.homeownersmtg.com