

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

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**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.

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**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.***

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**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](#)

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**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](#)

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## 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.

The screenshot shows the 'Request Early CD / Closing' form. On the right side, there are six callouts with arrows pointing to specific fields:

- 1: My Loan has been conditionally approved.
- 2: My rate is locked, and good through funding.
- 3: The Underwriter has fully approved the Appraisal and Title Report.
- 4: I have provided an Insurance Quote.
- 5: Property Tax amount is input for the Proposed Housing.
- 6: The Title Company and Hazard Information is updated.

The form fields and their values are:

- Conditional Approval Milestone Complete: Yes
- Loan is Locked (through Disbursement Date): Yes
- Appraisal & Title Approved by U/W: Yes
- Hazard (& MI if applicable) Quote in eFolder: Yes
- Property Tax Information Entered in System: Yes
- Vendor Info to be Complete (for Pg 5 of CD): Yes
- Document in eFolder: "Wholesale: Closing Conditions": No
- Document in eFolder: "Wholesale: Closing Misc": No
- Initial CD Requested: [blank]
- Initial CD Sent: [blank]
- Initial CD Received: [blank]
- Revised CD Sent: [blank]
- Closing Requested: [blank]
- Request Type: Early CD

### 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.”

The screenshot shows the 'Request Early CD / Closing' form. A red box highlights the 'Document in eFolder: "Wholesale: Closing Conditions"' field, which is currently set to 'No'. A red arrow points from this field to the 'Update Vendor Info' button in the 'Closing Information' section.

The form fields and their values are:

- Conditional Approval Milestone Complete: Yes
- Loan is Locked (through Disbursement Date): Yes
- Appraisal & Title Approved by U/W: Yes
- Hazard (& MI if applicable) Quote in eFolder: Yes
- Property Tax Information Entered in System: Yes
- Vendor Info to be Complete (for Pg 5 of CD): Yes
- Document in eFolder: "Wholesale: Closing Conditions": No
- Document in eFolder: "Wholesale: Closing Misc": No
- Initial CD Requested: 01/17/2018
- Initial CD Sent: 01/17/2018
- Initial CD Received: 01/20/2018
- Revised CD Sent: 01/17/2018
- Closing Requested: [blank]
- Request Type: [blank]
- Closing Information: [blank]

**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](#)

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**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](mailto:lkey@americu.com) with a description of the documents that you are requesting.

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**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>**