



FAQ's for TPO!

- 1. Help! I can't find the button to hit request or save!**
 - a. Try scrolling all the way down or up on the screen.
 - b. Zoom out on the screen...
 - i. By hitting control and the minus sign.
 - ii. In Chrome (Preferred Browser), control & zero will reset the zoom to 100%.
 - iii. On most webpages, control & the mouse 'Scroll Wheel' can control zooming
 1. We are noticing that some partners are working on their laptop or have the screen zoomed in and can't see the button without scrolling down.
- 2. Why do I have to put in my closing date on each CD request?**
 - a. Our Closing Team uses that to insure we are working towards your expectations.
 - b. You will not be able to select a closing date within 3 days of your closing request, until the Borrowers have received or presumed received (mailbox rule) the initial CD.
 - i. Example: The closers work 3 days out to ensure compliance dates are met. If the closing date is not updated and is too far in the future, their CD may not be prioritized for that day and the closing may be delayed.
- 3. Where do you put the vendor information in for closing now?**
 - a. In TPO Connect, under 'Manage 3rd Party Contacts'
 - i. Make sure all required fields are completed.
 1. Items usually missed: Wire info, License ID for Title Co and using the drop-down if there aren't agents/for sale by owner.
- 4. On the closing screen there is a new Interest Credit drop-down – what is that for?**
 - a. If the loan disburses within the first 5 days of the month – this option will be available.
 - i. By choosing the interest credit – borrowers first payment date will be the first month following disbursement. (In place of the traditional 'skip a month')
- 5. I have to do a COC and a CD already went out – what do I do?**
 - a. Use the drop-down on the Request Early CD/Closing and select COC CD. At the bottom of the screen – put any needed information in the Special Instructions box.
- 6. How can I tell if a CD/Closing request has been completed correctly?**
 - a. On the Early CD / Closing request screen in TPO Connect– there is a key-date tracking section.
 - i. Look for a date under Initial CD Requested (for early CD) or Closing Requested (for their closing). If a date is populated it has been received.

Early CD/Closing Tracking				
Initial CD Requested: 01/30/2019	Initial CD Sent: 01/31/2019	Initial CD Received: 01/31/2019	Revised CD Sent: 02/06/2019	Closing Requested: 02/05/2019