

# *Creating Users in TPO Connect*



# Login To TPO Connect



The screenshot shows the IHDA Mortgage TPO Connect web application. At the top left is the IHDA Mortgage logo. To the right, there are links for 'CONTACT US' 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 content area is divided into two columns. The left column is titled 'Recently Accessed Loans' and contains a 'No data.' message. The right column is titled 'Company Announcements' and shows a single announcement: 'TPO Connect Pilot Group' dated '01/02/2020 09:54 AM'. At the bottom of the right column, there is a pagination control showing '5 per page' and a page number '1'. The footer contains the address '111 E Wacker St, Chicago, IL 60601', a 'Privacy Policy Statement' link, contact information 'Toll Free: 877 - 456 - 2656' and 'mortgage@ihda.org', and three icons: a person, a recycling symbol, and a house.

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



# Select Manage Account



- *Can also update your current password from this menu*



# Select Company Accounts



**IHDA MORTGAGE** CONTACT US Mike McEvoy

WELCOME PIPELINE ADD NEW LOAN SCENARIOS DOCUMENTS

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>

30 per page | 1

### Company Licenses

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



Manager

Assigned AE's: IHDA Mortgage Systems

AE Email Addresses: IHDA Mortgage Systems@ihda.org

**Company Contacts**

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, ...	

**Company Licenses**

State	License Type	License
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**Create New Contact**

\* Email Address:

\* First Name:

Middle Name:

\* Last Name:

Login Status: Enabled

NMLS ID:

Social Security #: #####

\* Organization:

Use Company Address

Address:

City:

\* State:

Zip:  -

Business Phone:  Ext.

Business Fax:  Ext.

Cell Phone:

\* Personas:

View access to team's loans

Edit team's loans

Assigned AE: IHDA Mortgage Systems

Record Last Updated: 2/24/20 5:37:22

**\* = Required Fields**

**Blue Arrow:** Choose to allow TPO user to View or Edit other team's loan files (Uploading of documents requires Edit access)

**Green Arrow:** Choose the User's Organization



# Select Organization



Create New Contact

Contact Organization

Mike McEvoy

Organization

- Illinois Housing Development Authority - Test

Your Selection: Illinois Housing Development Authority - Test/

Cancel Save

- *Within Contact Organization you will have only Corporate as an option*
- *Just click 'Save' and this will put the User in the Company Contacts (Blue Arrow: Current User Organization)*



# Add User Persona



The screenshot displays the IHDA Mortgage system interface. A modal window titled "Contact Persona" is open for user "Mike McEvoy". Inside the modal, under the heading "Personas", there are three checkboxes: "TPO Manager" (checked), "TPO Processor" (unchecked), and "TPO Loan Officer" (unchecked). The background shows the user's profile details, including "Email Address: mmcevoy@ihda.org", "First Name: Mike", "Last Name: McEvoy", and "Login Status: Enabled".

- *TPO Manager has ability to create other users*
- *As of right now the TPO Loan Officer and TPO Processor are functionally the same*





# Click Save to Create User



The screenshot shows a web application interface with a 'Create New Contact' modal form. The form contains the following fields and options:

- \* Email Address:
- \* First Name:
- Middle Name:
- \* Last Name:
- Login Status: Enabled
- NMLS ID:
- Social Security #:  (masked with ###-##-####)
- \* Organization:
- Use Company Address
- Address:
- City:
- \* State:
- Zip:  -
- Business Phone:  Ext.
- Business Fax:  Ext.
- Cell Phone:
- \* Personas:
- View access to team's loans
- Edit team's loans
- Assigned AE: IHDA Mortgage Systems
- Record Last Updated: 2/24/20 5:37:22

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. 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)>



# Disable Active User



The screenshot displays a user management interface. On the left, a sidebar shows 'Contact Details' for a user with email 'solivas@guild.test', first name 'sarah', and last name 'olivas'. The 'Login Status' is currently 'Enabled'. The main area shows the 'Edit Contact Information' form. The 'Login Status' dropdown menu is open, and 'Disabled' is selected. A red arrow points to this dropdown. Other fields include 'Email Address', 'First Name', 'Middle Name', 'Last Name', 'Login Email Address', 'NMLS ID', 'Social Security #', 'Organization', 'Use Company Address', 'Address', 'City', 'State', 'Zip', 'Business Phone', 'Business Fax', and 'Cell Phone'. The 'Personas' section shows 'TPO Manager' with checkboxes for 'View access to team's loans' and 'Edit team's loans'.

- Similarly, you can Disable current users by editing their contact information and changing the Login Status to “Disabled” then Saving





***Thanks for attending!***

***We appreciate your partnership!***

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

