Contents (click to navigate to section)

NEW USER - REGISTERING FOR ACCESS:

Back to Main Menu

1) Visit partners.quorumfcu.org & select Partner Portal (upper right corner)
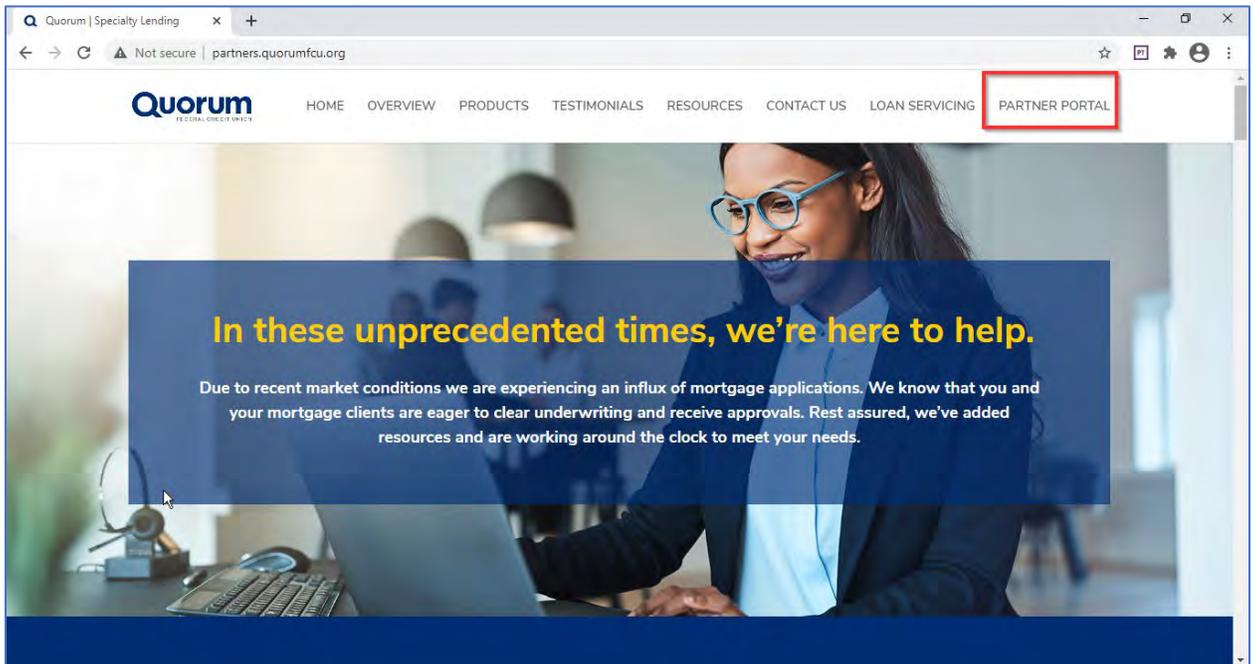
2) Scroll down to complete the Partner Portal New User Request section – fill out and select Submit

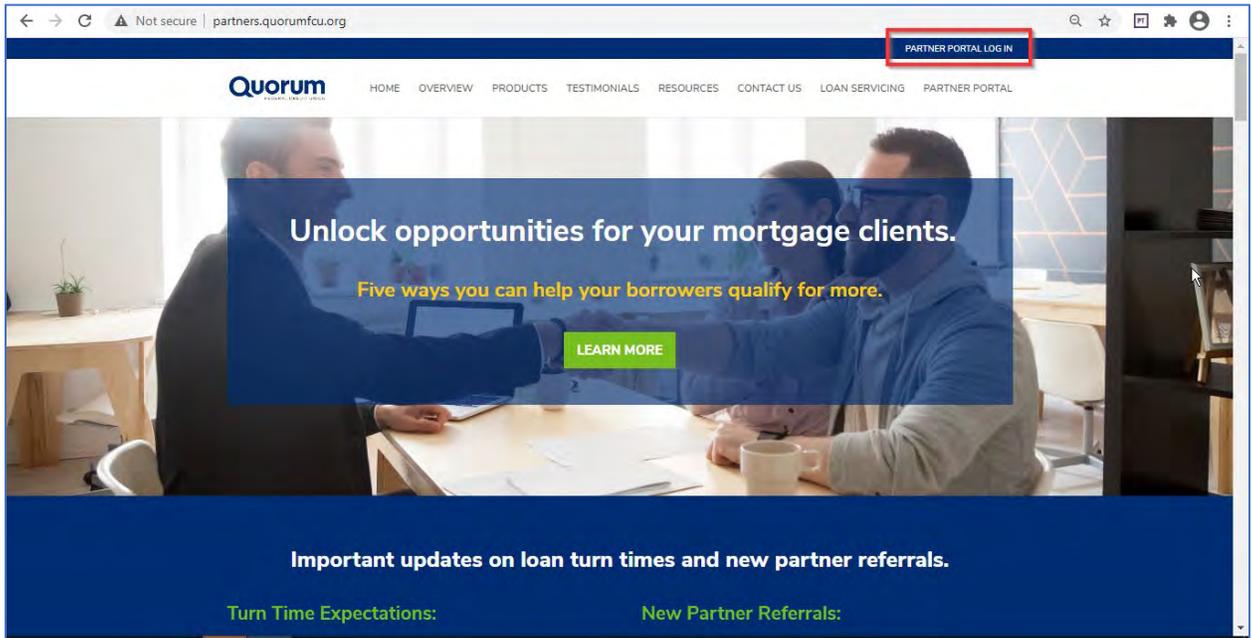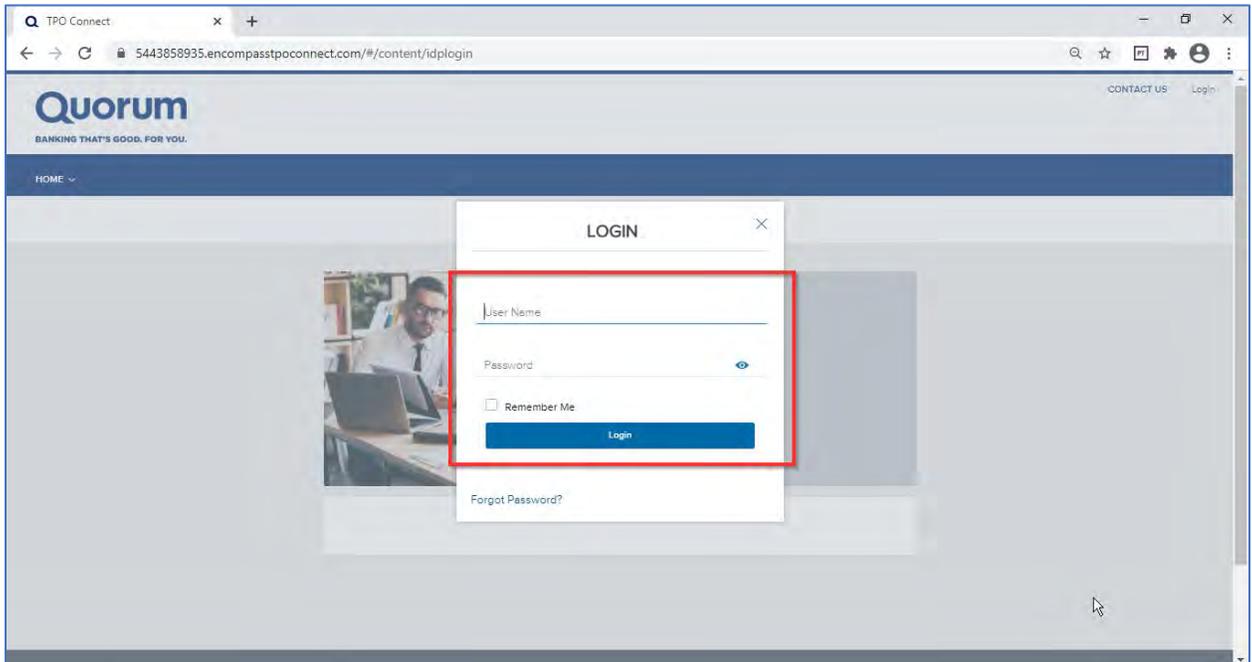3) Within 1 business day you will receive an email with user credentials – example below:
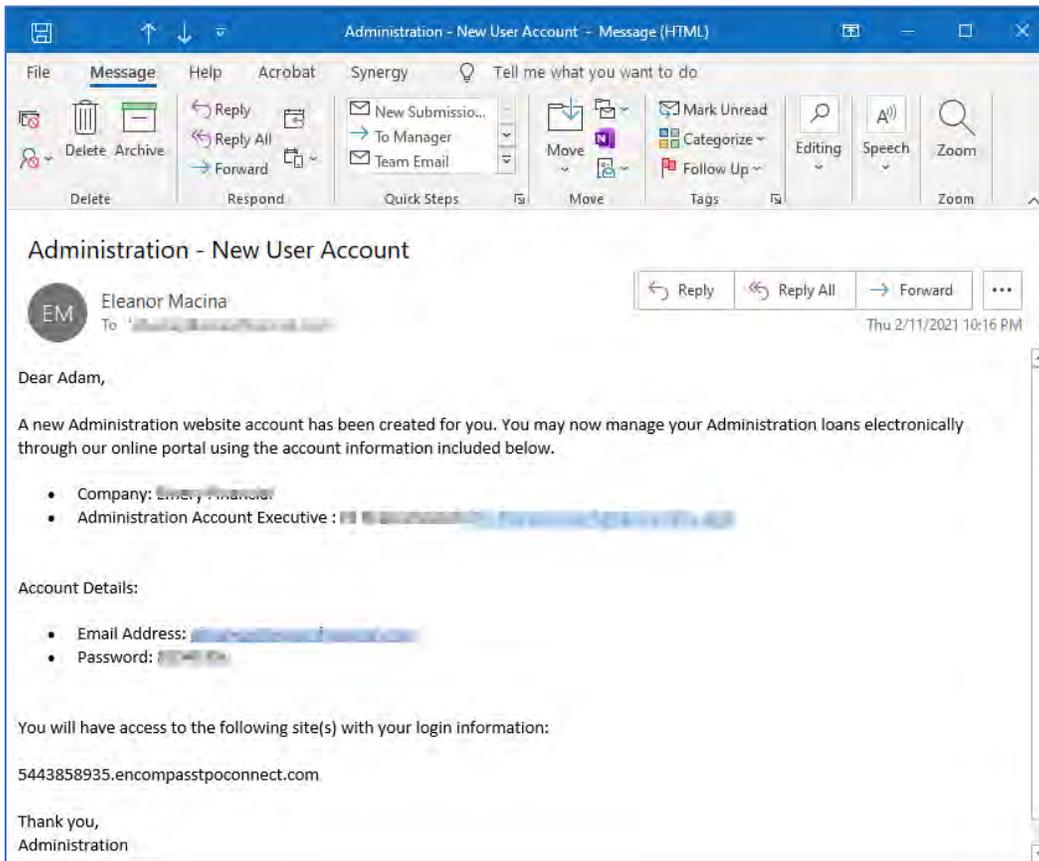
EXISTING USER – LOGGING INTO THE PARTNER PORTAL:

1) Visit partners.quorumfcu.org & select PARTNER PORTAL LOG IN (upper right corner)
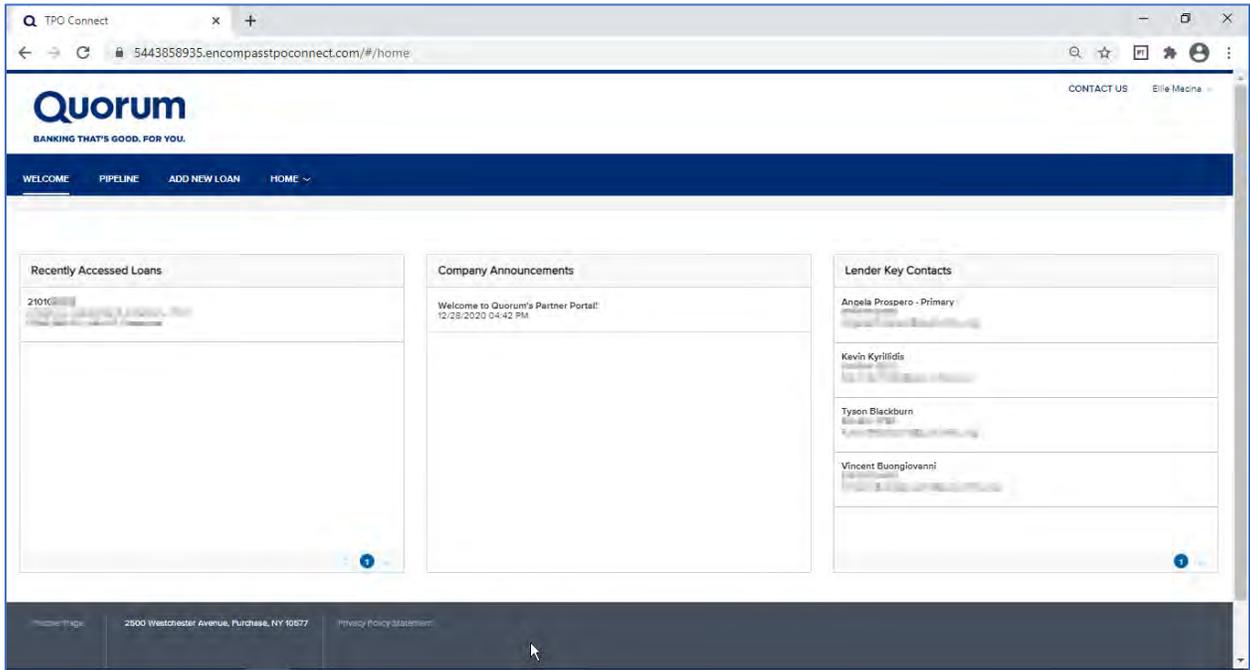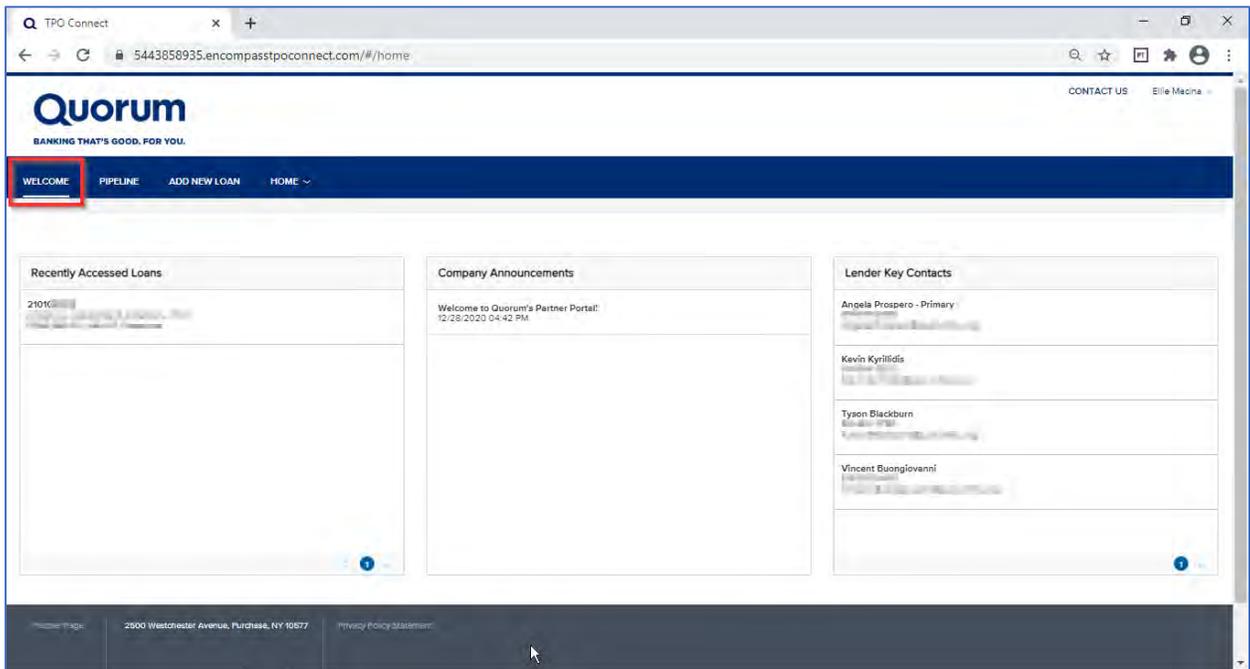

2) Enter User Name and Password, then select Login

PARTNER PORTAL – OVERVIEW

Back to Main Menu

1) Once logging in, you will be brought to the home page below.
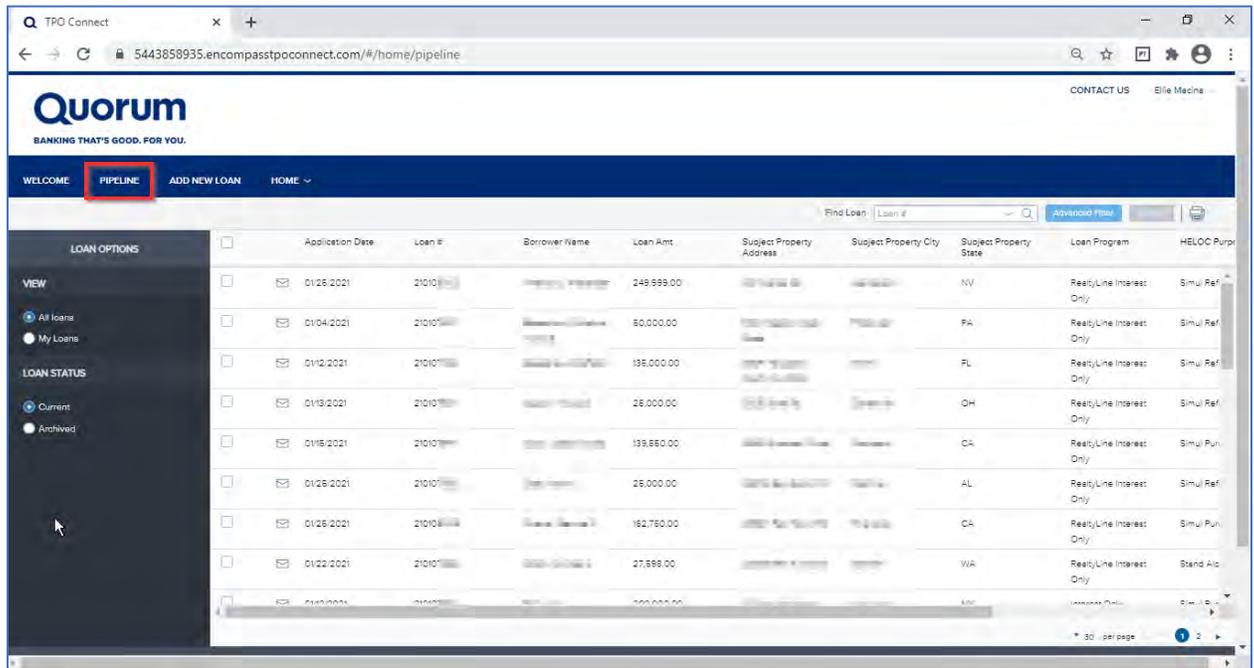

2) Select Welcome from the top menu to return to the above page, at any time when in the Partner Portal
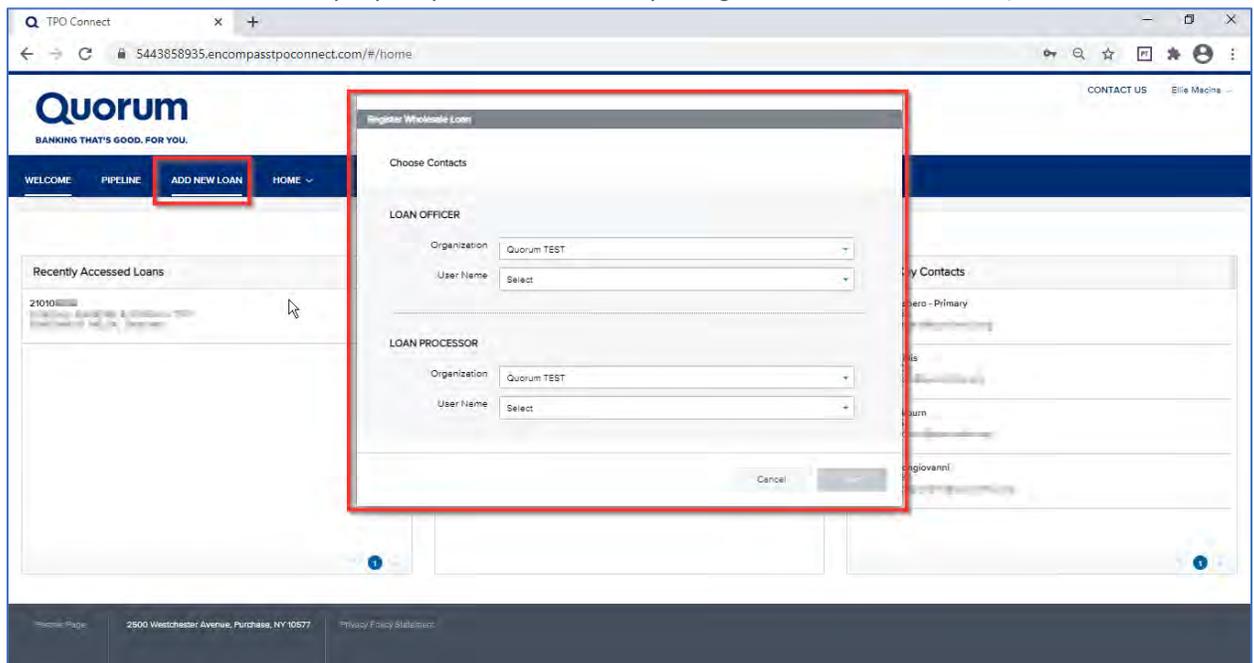
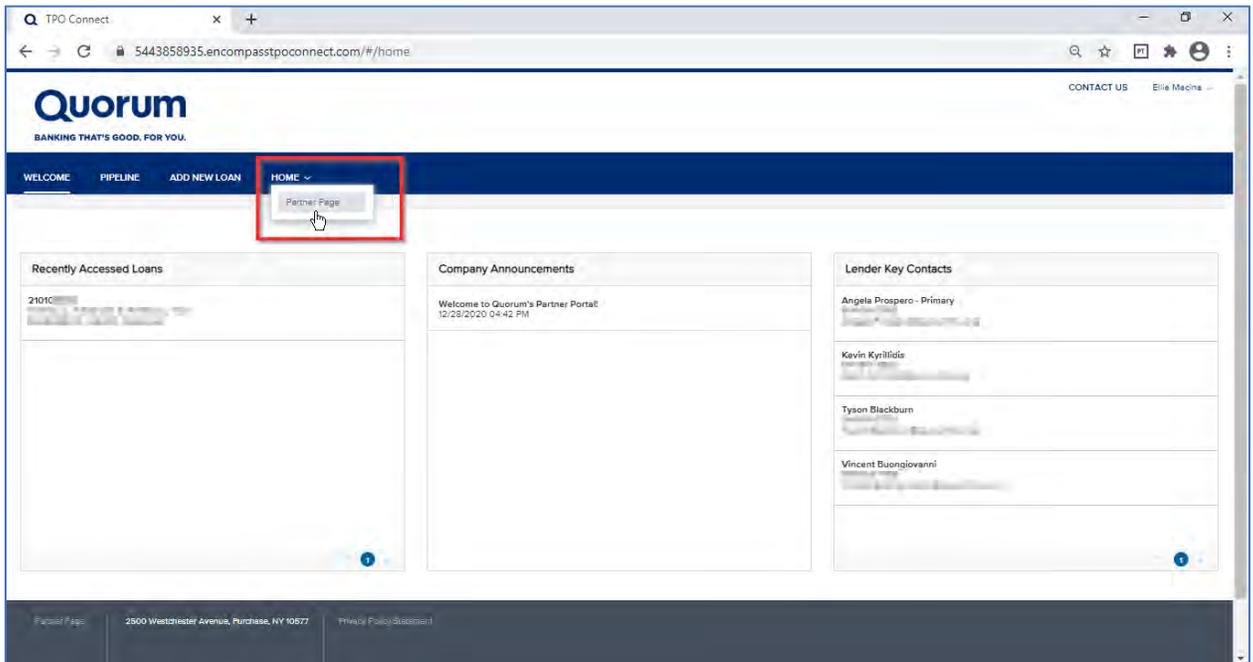3) Select Pipeline from the top menu to view the loans in your Pipeline

4) Select Add New Loan from the top menu to start a new submission (See *Starting a New Submission* section for a step-by-step overview of completing a new loan submission)
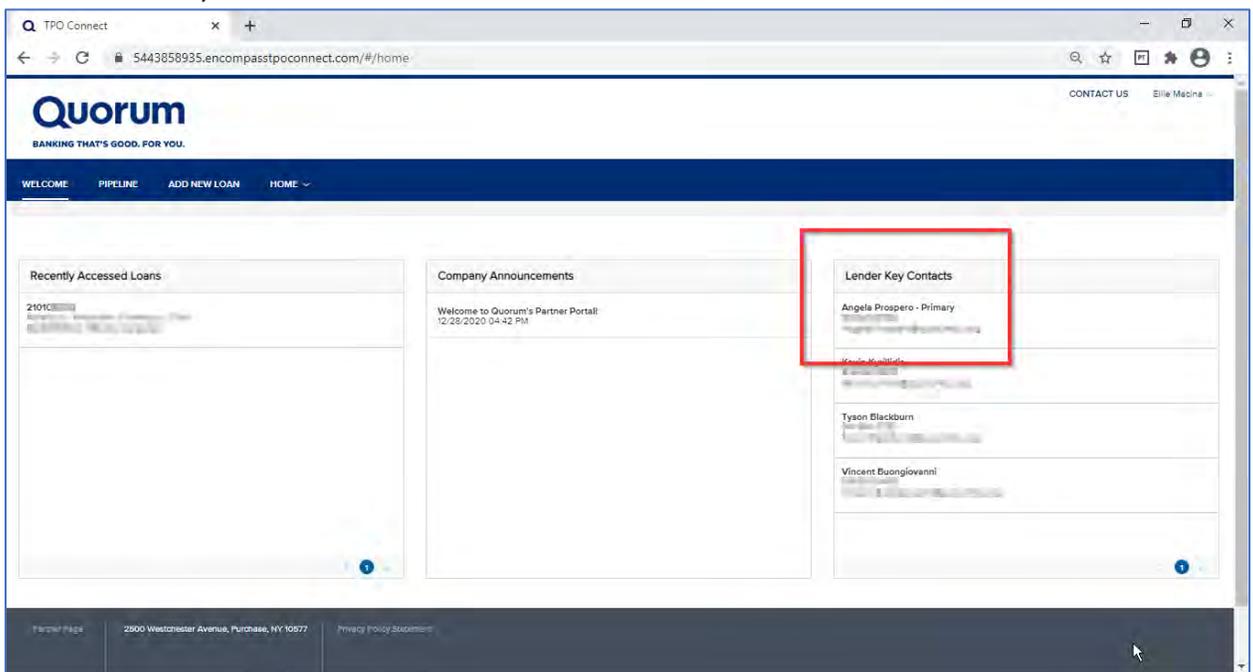
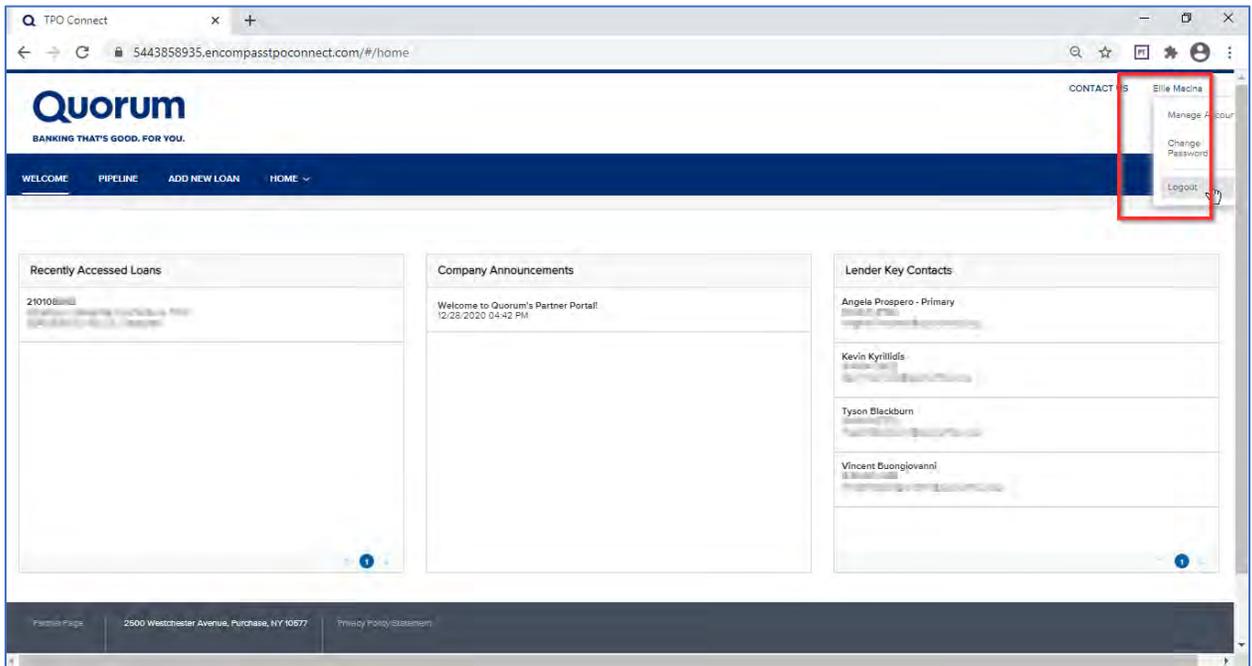5) Select Home from the top menu to visit our main website partners.quorumfcu.org

6) You will find your Account Executive's contact information (phone number & email address) under Lender Key Contacts
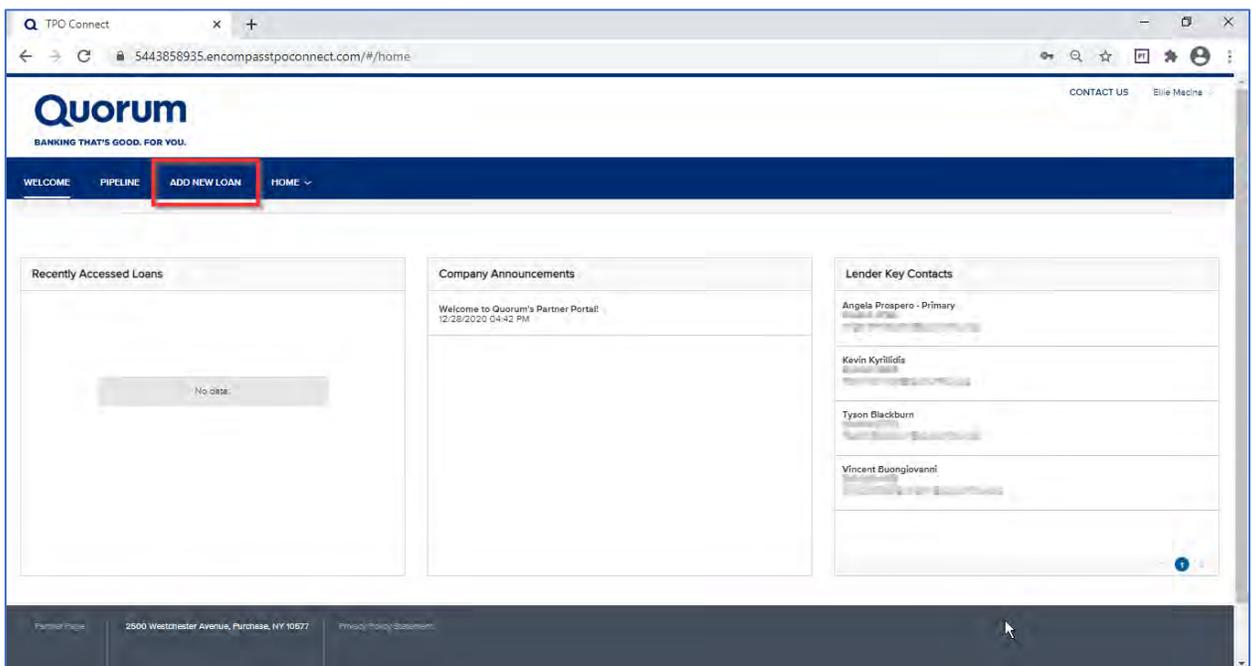
7) To Log Out, select your name in the upper right corner, then select Logout

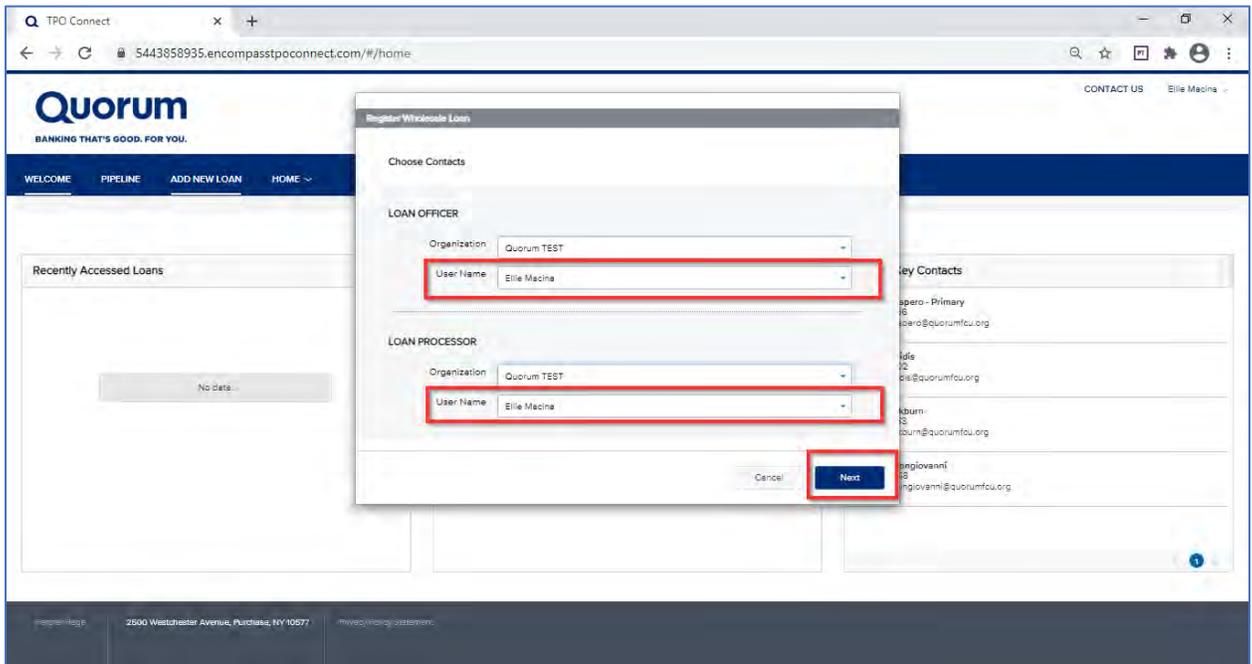## STARTING A NEW LOAN SUBMISSION

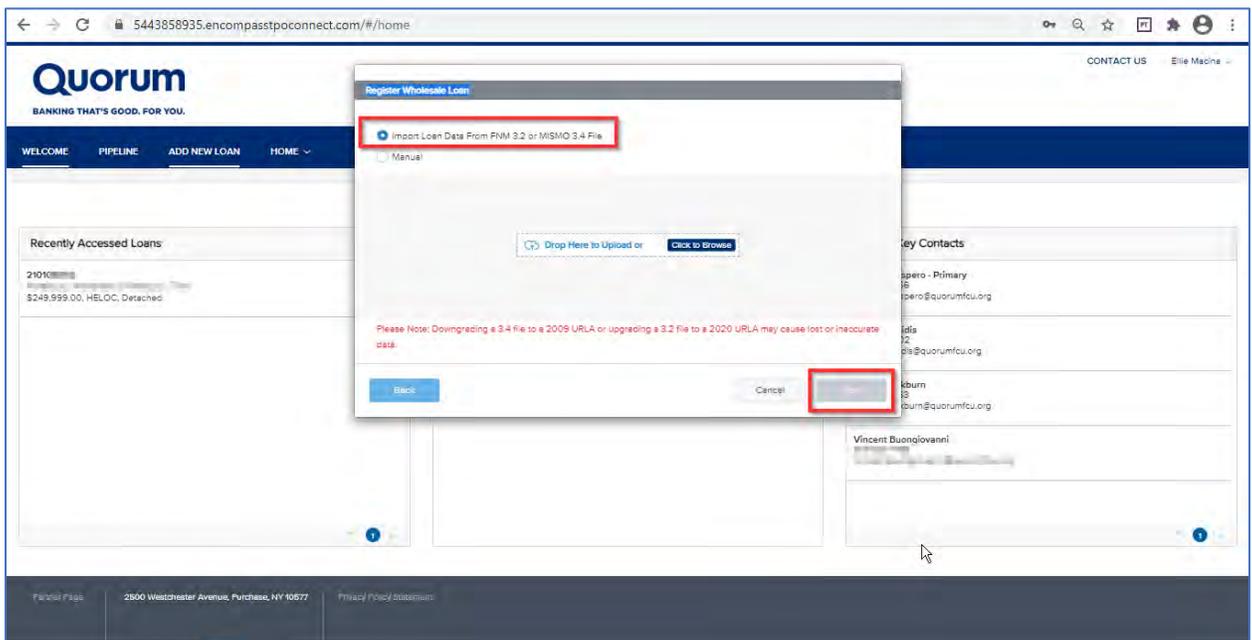1) To start a new submission, select Add New Loan

2) Select User Name under Loan Officer and Loan Processor, and select Next

3) Select Click to Browse to upload the FNM 3.2 file or MISMO 3.4 file from your local drive, then select Next

4) You will be brought to the below page

5) Follow the instructions at the top of the page in red. This includes updating the Loan Amount to the amount of the HELOC (since this defaulted to the value of the first mortgage from the 3.2 FMN file). Please also change Concurrent First to Yes if the submission is for a Simultaneous Purchase or Refinance.

Select "Step 1 – Start Submission"
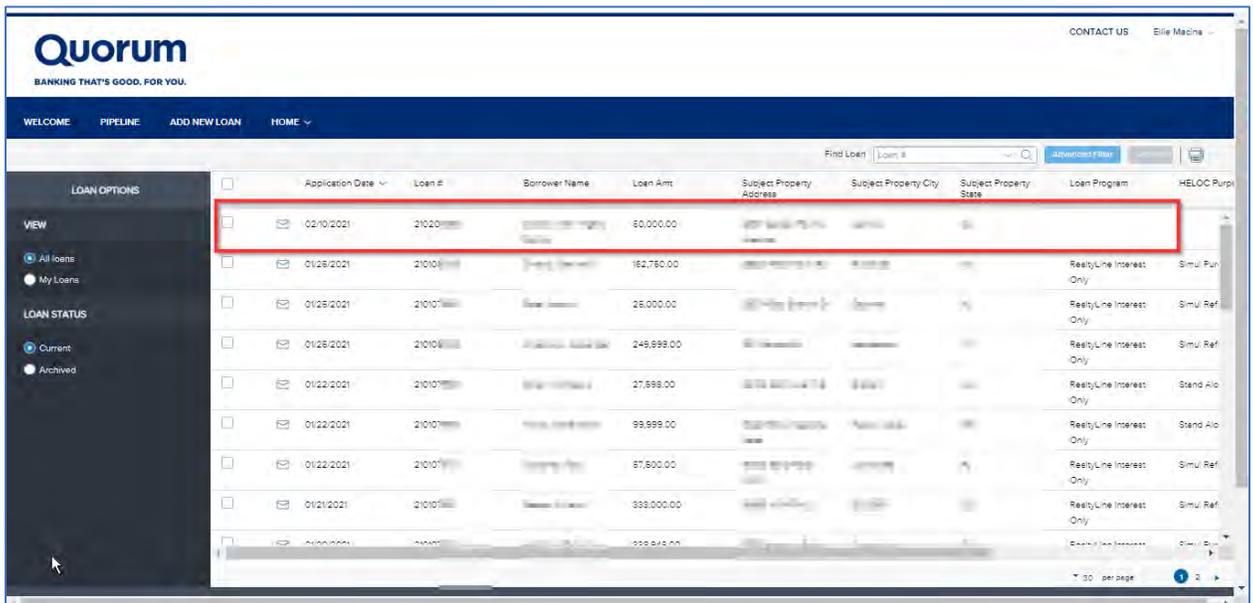
6) If other required fields are blank, you will see the below alert. Fill in the fields accordingly, then select Update
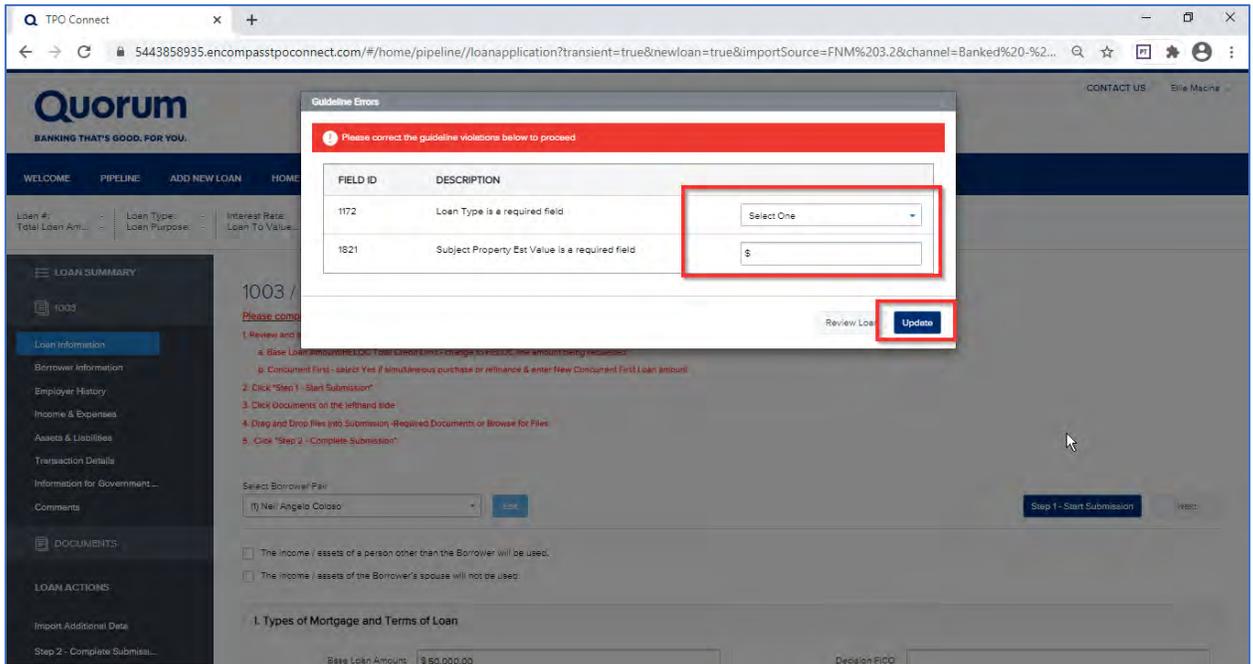

7) Once selecting "Step 1 – Start Submission", if you exit the application or close the website, you can go back into this application submission by selecting "Pipeline" from the top menu then double clicking the application

8) But you are not done yet! Your application will not be fully submitted for review until you upload the required documents and select "Step 2 – Complete Submission". You will receive the below email as a reminder:
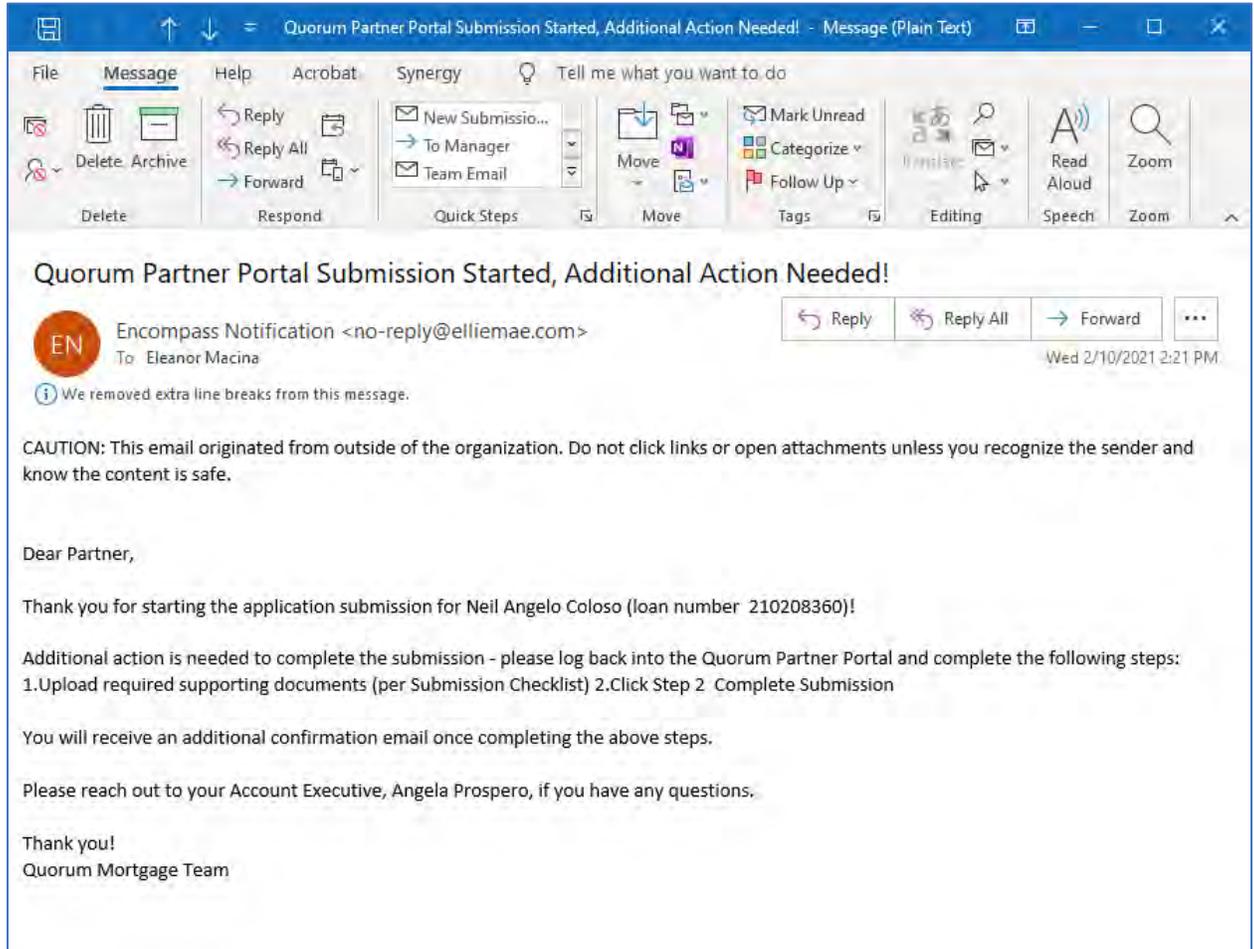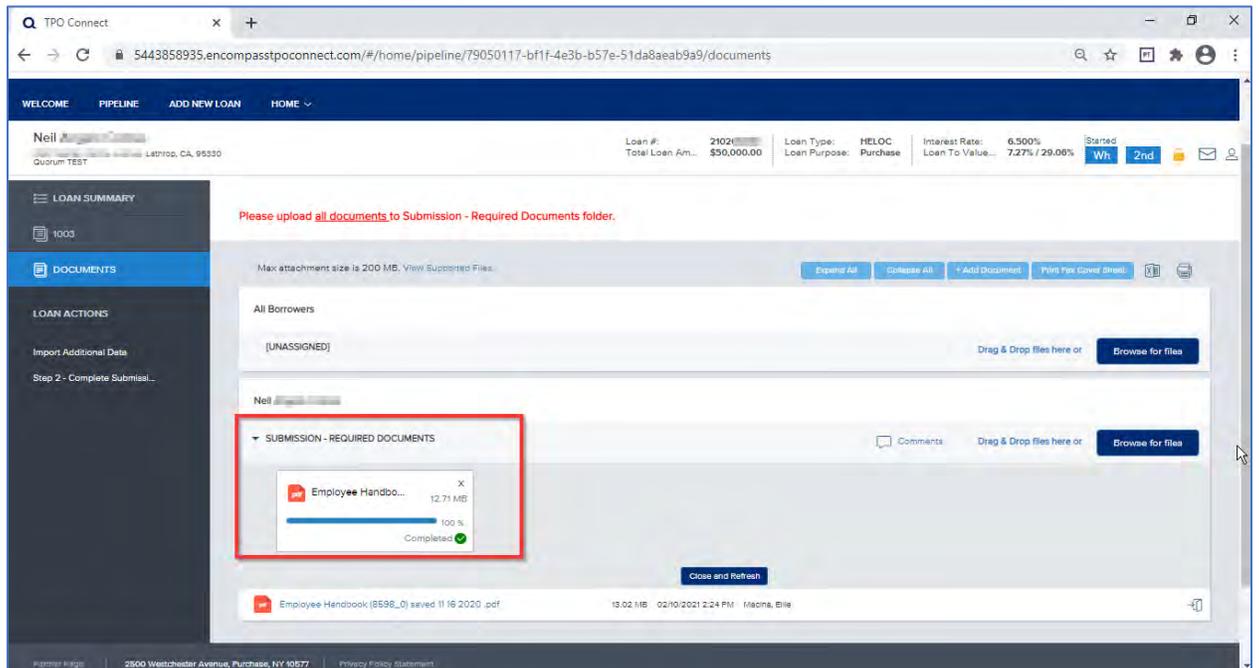
9) In the application, select Documents from the left-hand menu, then next to **Submission – Required Documents**, select "Browse for files", then select your files from your local drive
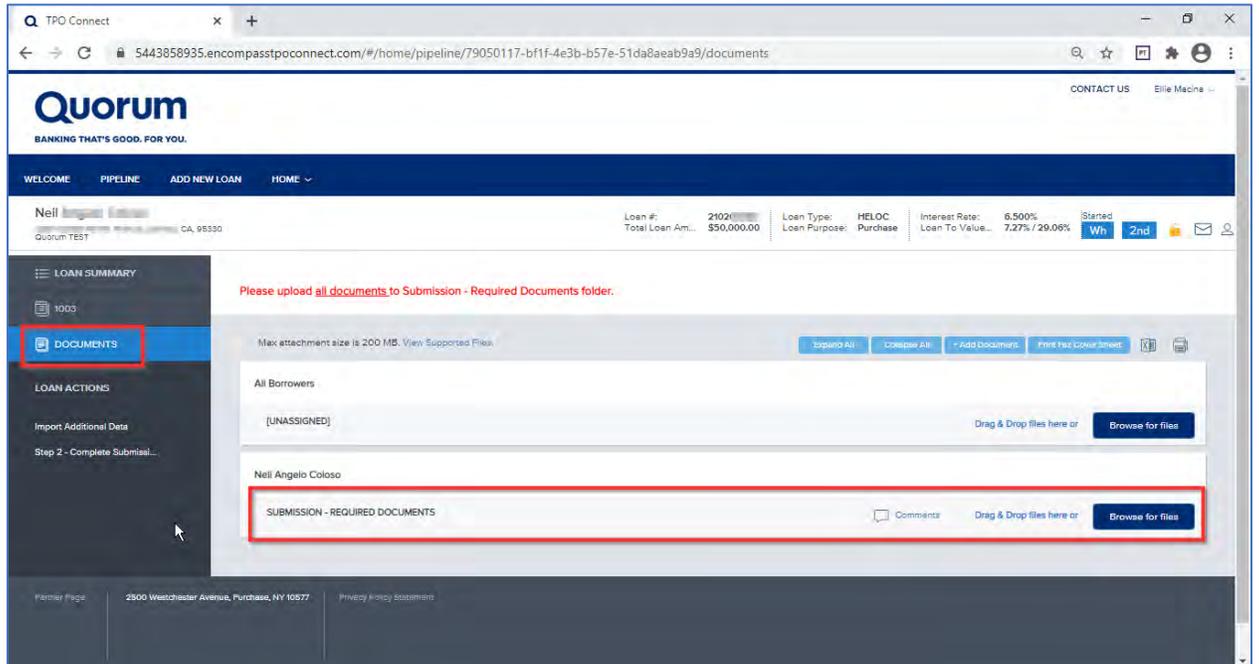
10) Once the upload is complete you will see the below

11) Select "Step 2 – Complete Submission" from the left-hand menu. Pop-up box will open at the top center, select Continue

12) You will see the below message once successfully submitted

13) You will receive the below email as confirmation as well:
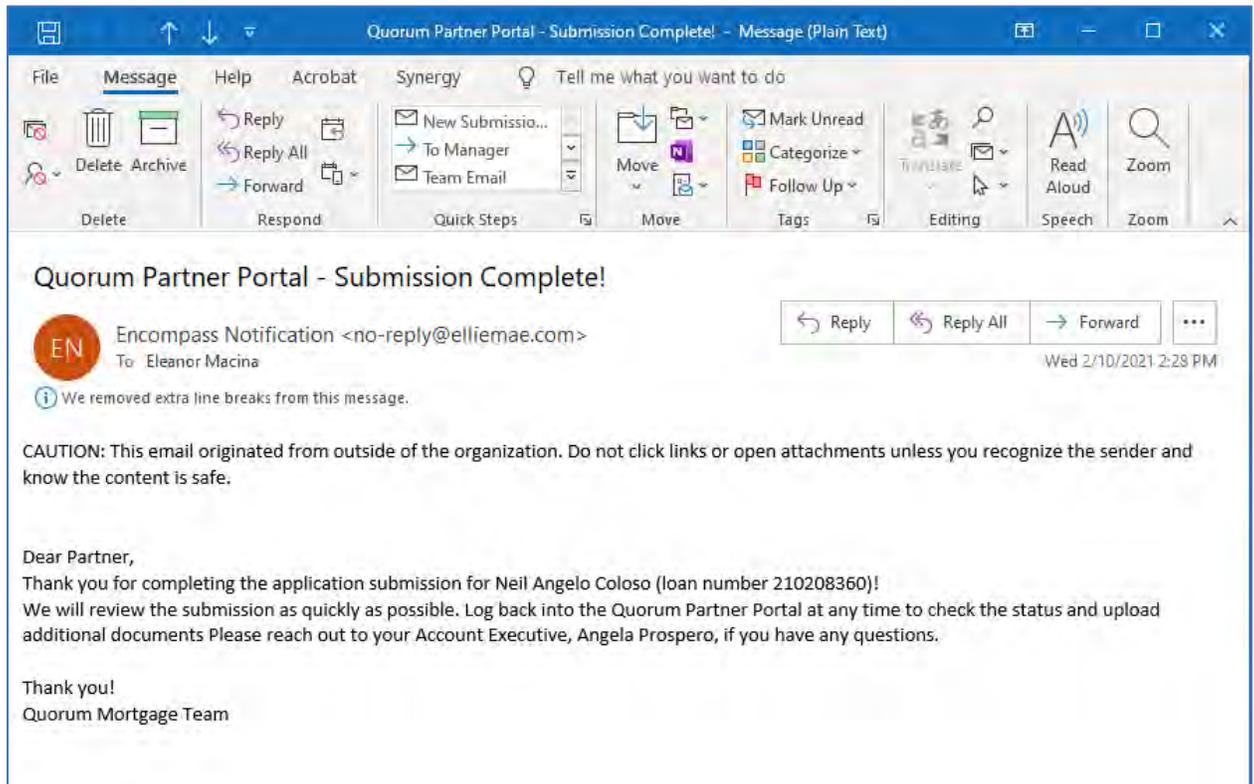
14) Select Welcome from the upper menu to go back to your homepage
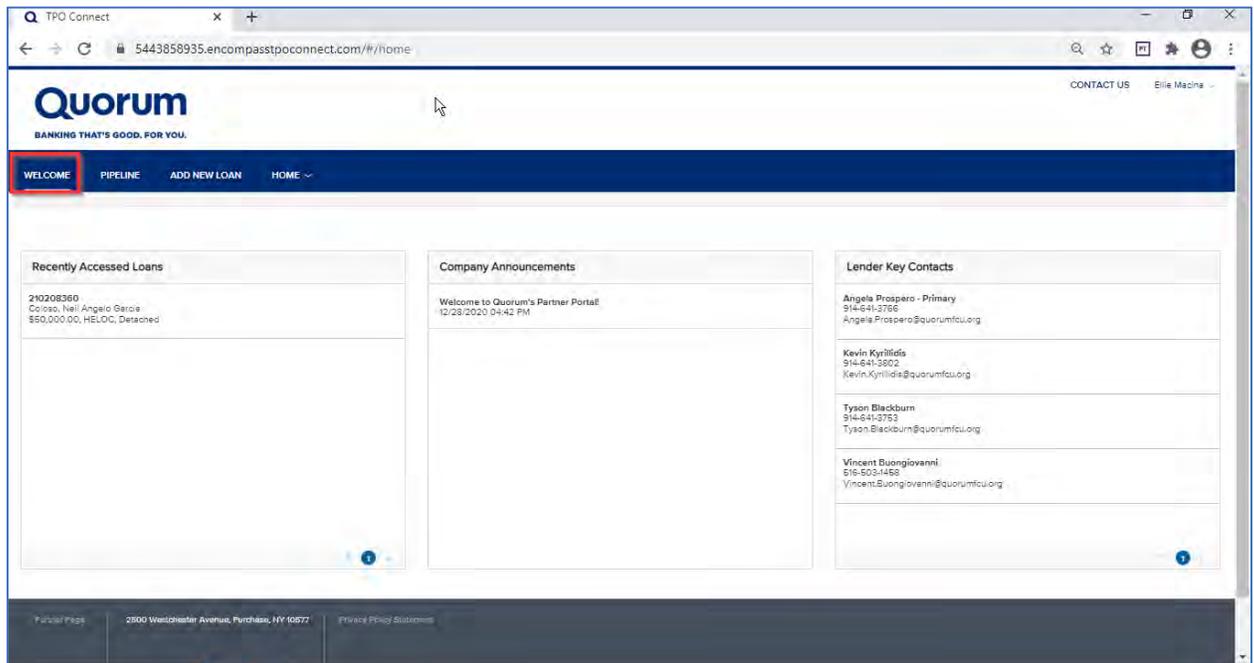
CHECK THE STATUS OF AN EXISTING SUBMISSION

Back to Main Menu

1) Once logging into the Partner Portal, select Pipeline from the top menu

2) Search your Pipeline by selecting the column title to sort by that column or entering the loan number in the Find Loan search box

3) Double-click on the desired loan submission

4) View updates within the submission

5) Select Pipeline from the top menu to return to your Pipeline

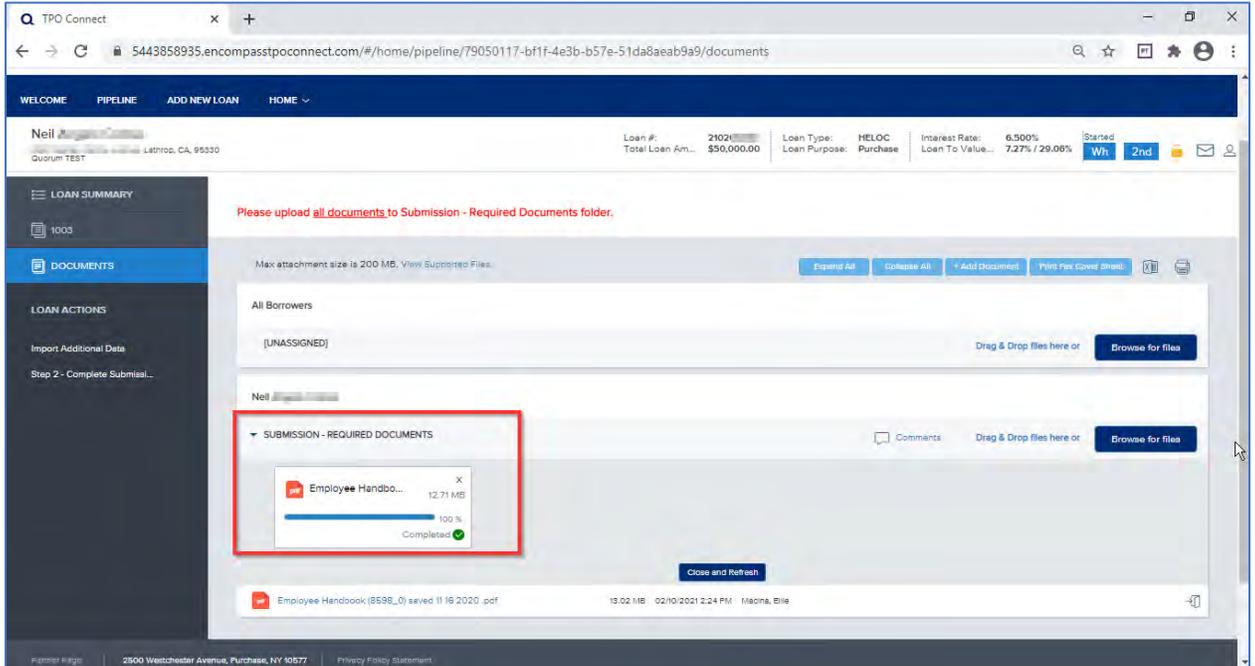## UPLOAD ADDITIONAL DOCUMENTS TO AN EXISTING SUBMISSION

Back to Main Menu

1) Once logging into the Partner Portal, selecting Pipeline, and double-clicking on the desired loan - select Documents from the left-hand menu, then next to **Submission – Required Documents**, select "Browse for files", then select your files from your local drive
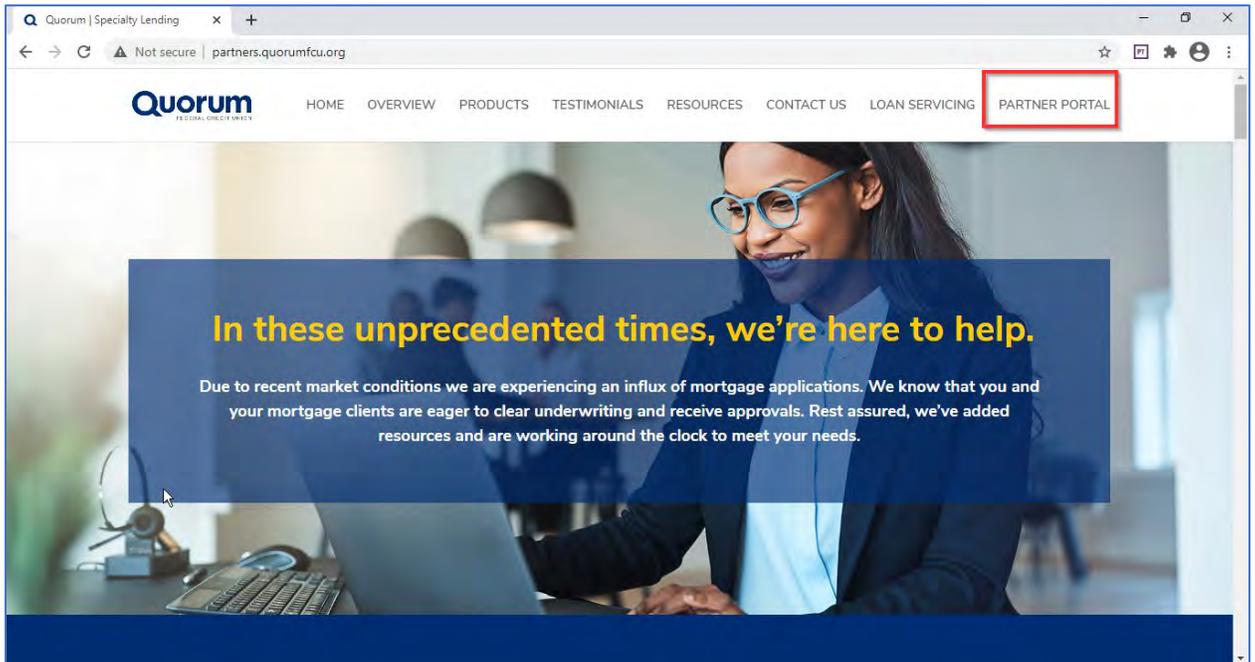
2) Once the upload is complete you will see the below

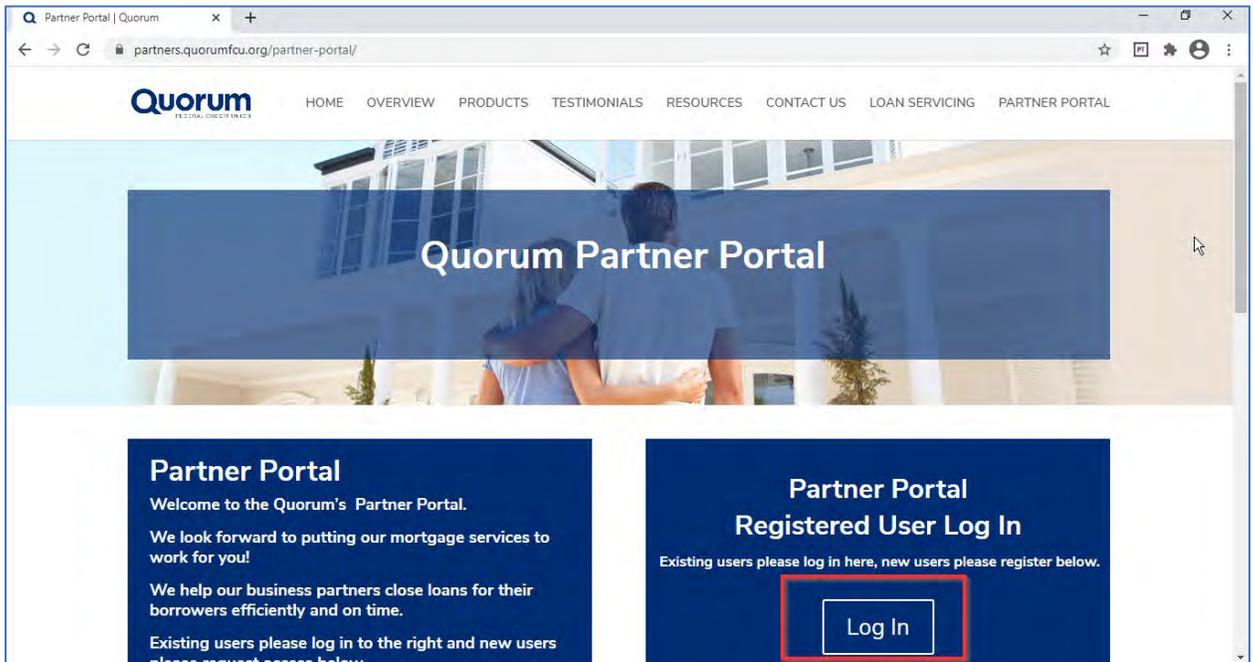## UNABLE TO LOGIN TO PARTNER PORTAL – FORGOT PASSWORD

Back to Main Menu

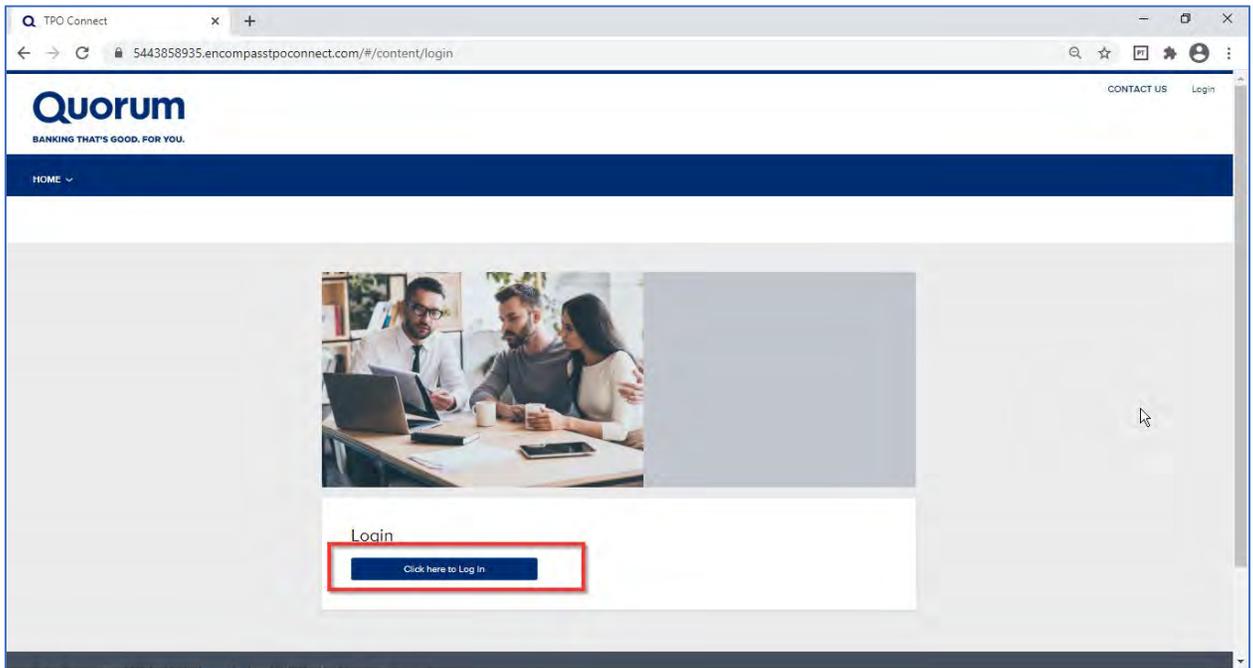1) Visit partners.quorumfcu.org & select Partner Portal (upper right corner)
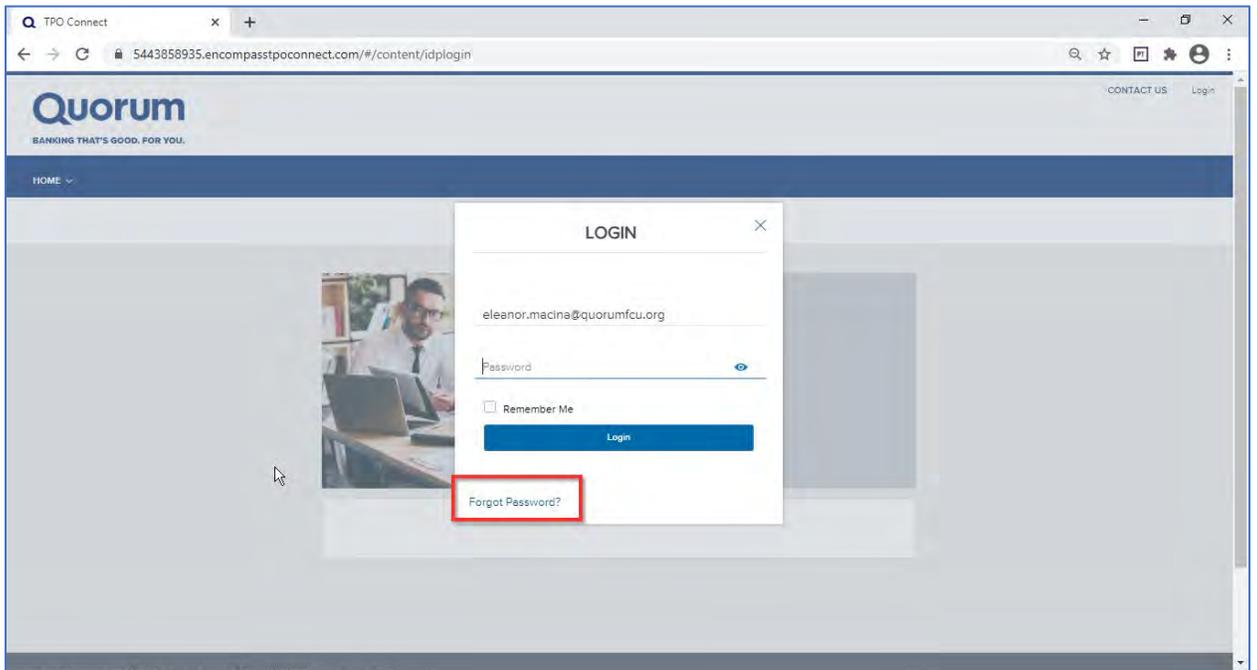
2) Select Log In
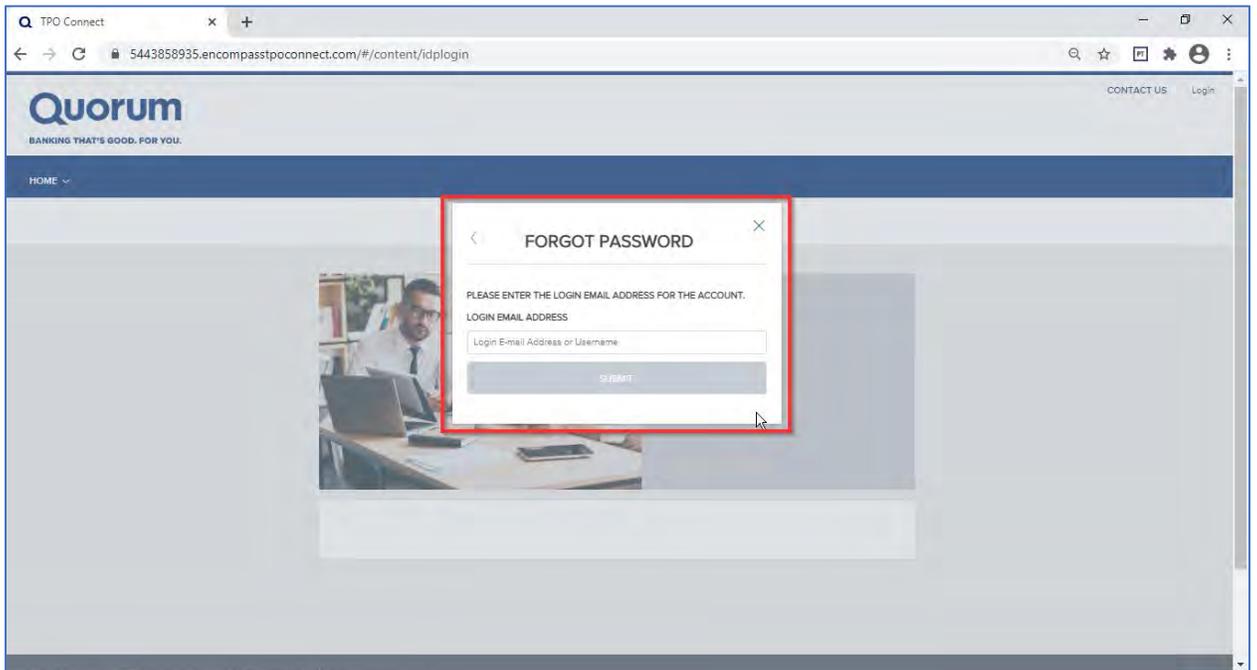

3) Select Click here to Log In
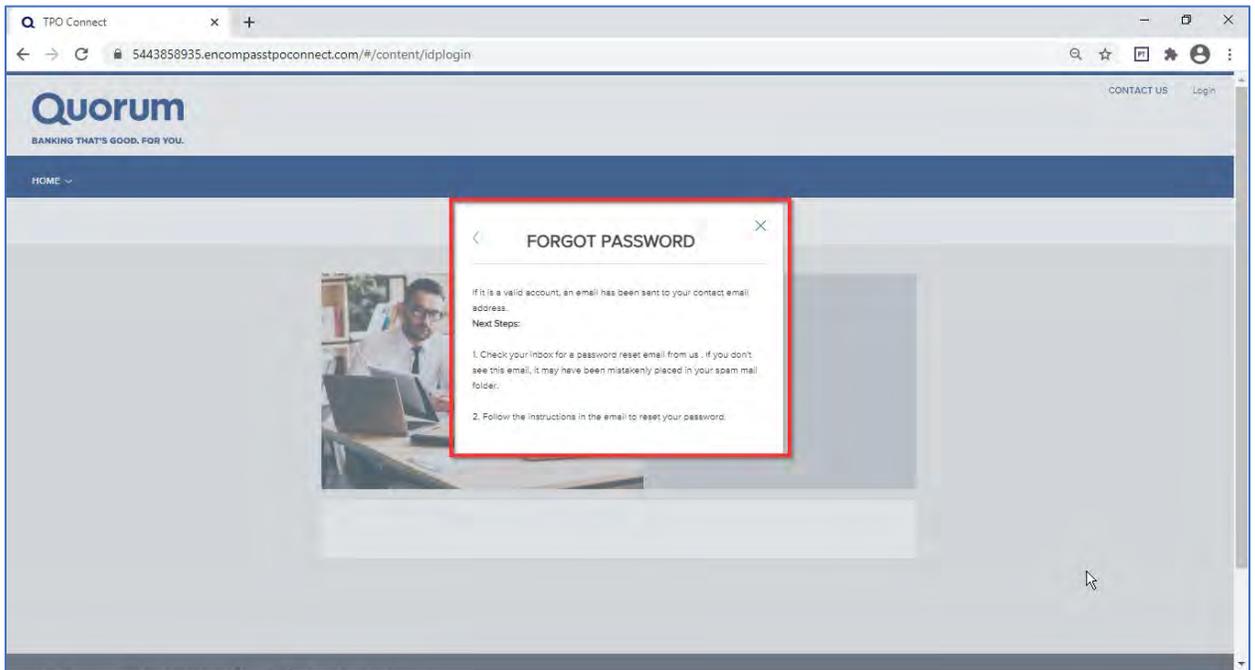
4) Select Forgot Password

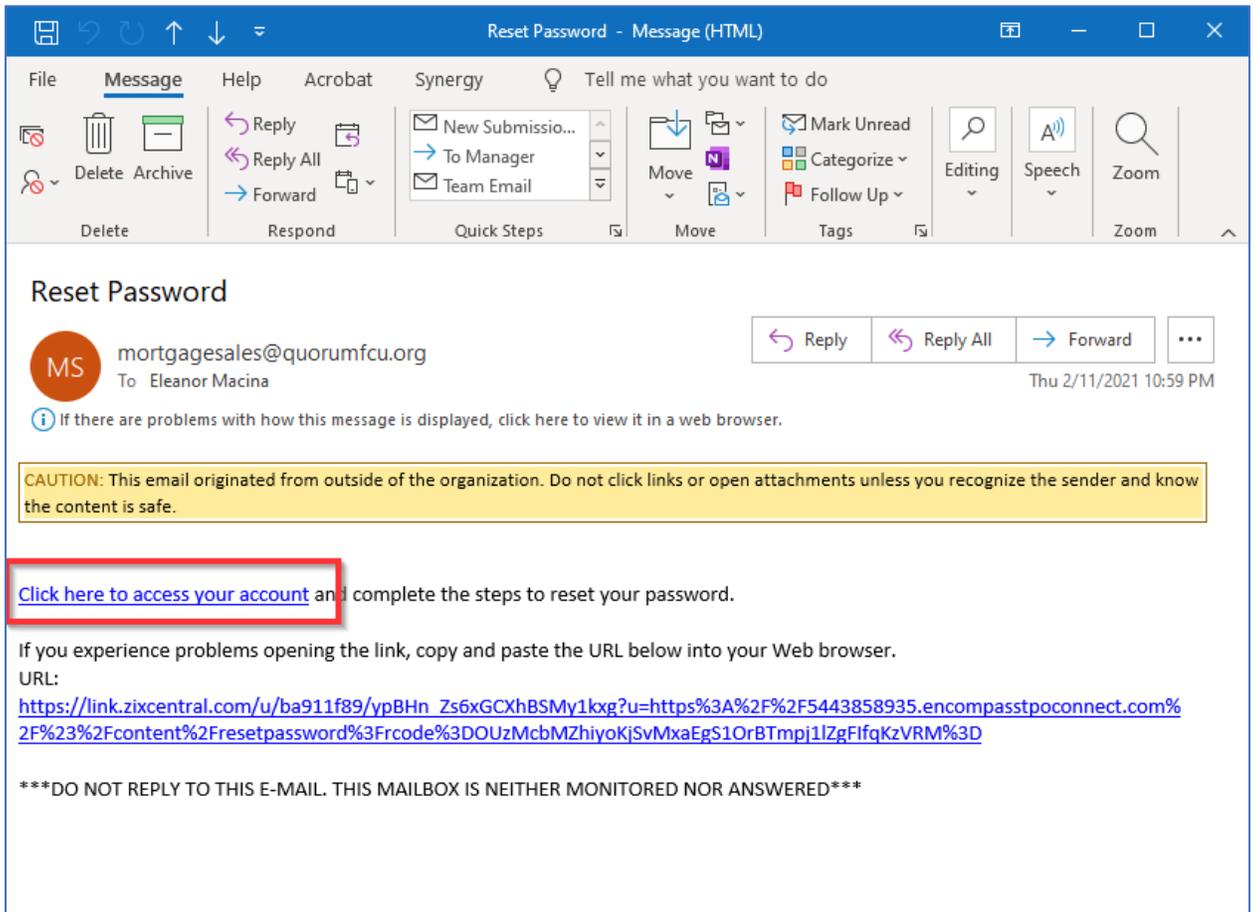5) Enter user name (email address) and select Submit

6) You will see the following message on-screen

7) You will receive the below email – select the link in the email

8) Enter user name and new password, then select Reset Password