QUORUM PARTNER PORTAL

QUICK TIP: CLICK ON THE SECTION TITLE BELOW TO JUMP DIRECTLY TO IT!

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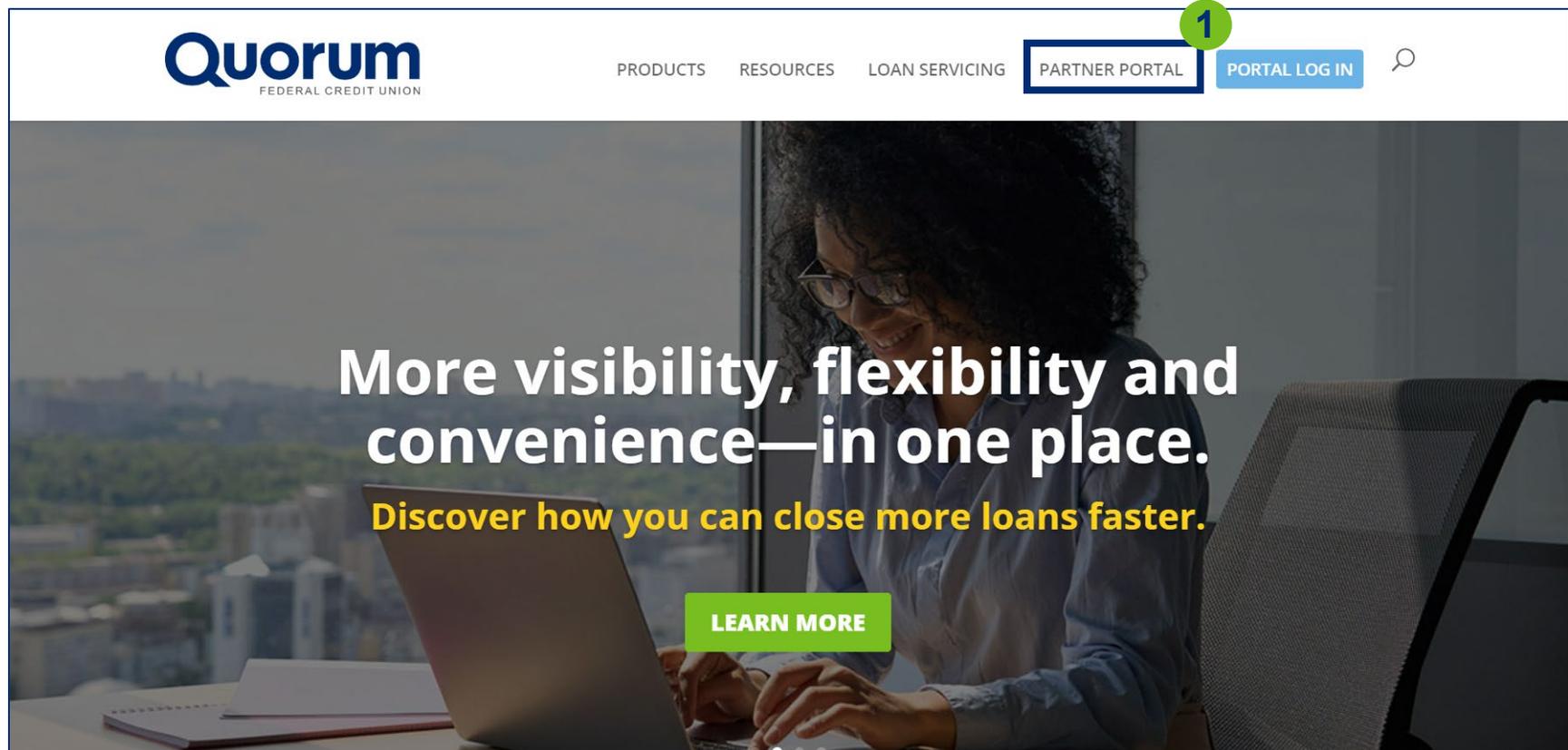## NEW USER REGISTERING FOR ACCESS:

1. Visit partners.quorumfcu.org & select "Partner Portal."

2. Click "Sign Up Now" in the "New User Sign Up" box.

2. Fill out the Partner Portal New User Sign Up form.

Quorum FEDERAL CREDIT UNION   PRODUCTS   RESOURCES   LOAN SERVICING   **PARTNER PORTAL**   PORTAL LOG IN

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Partner Portal New User Sign Up

Ready to submit a loan? Please register here.

Company Name

Company NMLS #

Branch NMLS

Branch Street Address

Branch City
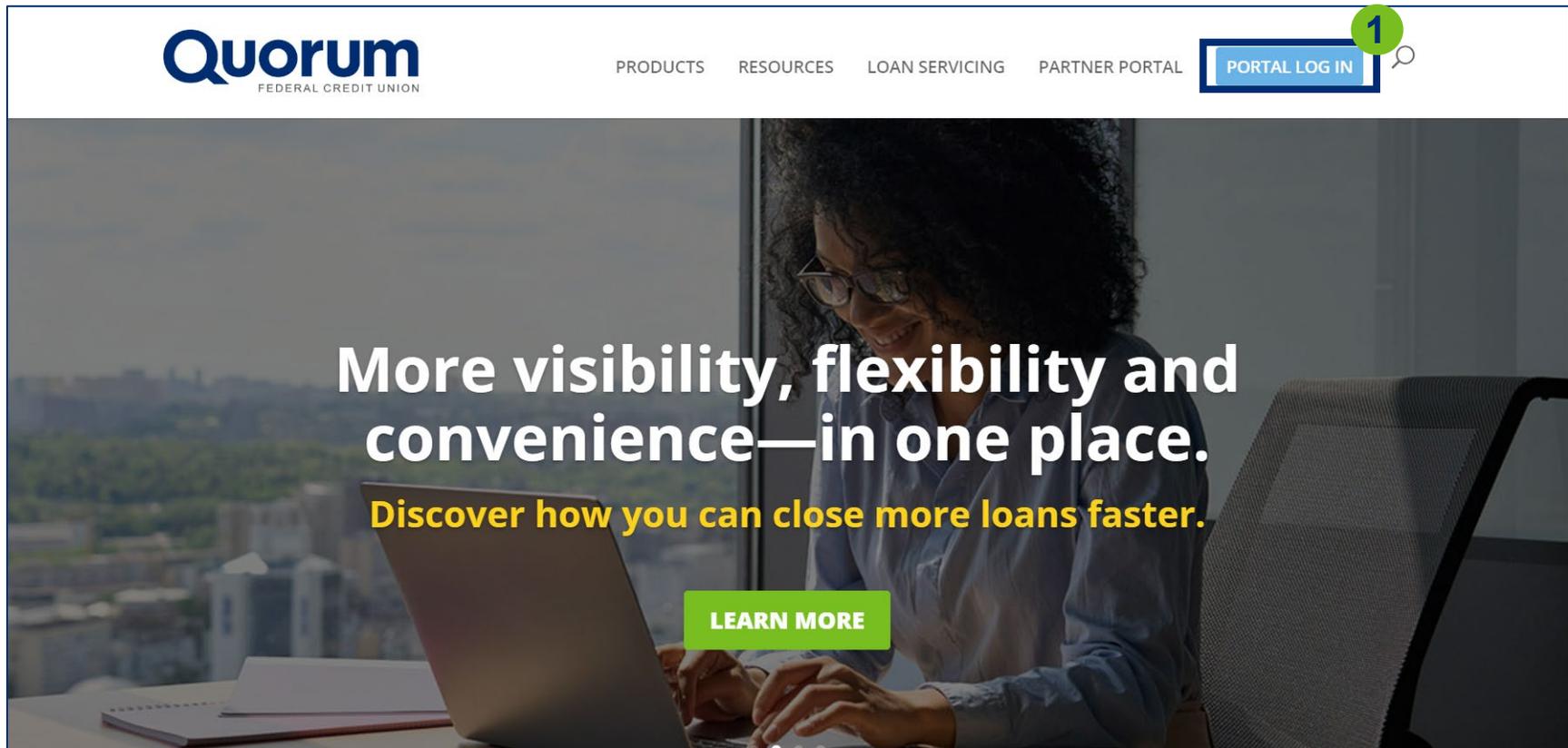
Branch State/Region

Loan Officer Name

Loan Officer NMLS #

EXISTING USER LOGGING INTO THE PARTNER PORTAL:

1. Visit partners.quorumfcu.org & select "Portal Log In."

2. Enter username and click "Continue."

3. Enter password and click "Login."

PARTNER PORTAL OVERVIEW:

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

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2. Click "Welcome" from the top menu to return to the below page, at any time when in the partner portal.

3. You will find your account executive's contact information (phone number & email address) under "Lender Key Contacts."

4. Click "Pipeline" from the top menu to view the loans in your pipeline.

5. Click "Add New Loan" from the top menu and complete the steps for a new submission. See further instructions in *Starting a New Submission* section.

6. To access reports, click "Reporting" from the top menu.

7. Click the dropdown arrow next to "Select a Report."

8. Click on the type of report you would like to view. You will have the option to view the report on screen or export it to PDF/CSV using the export buttons on the upper-right corner of the screen.

9. Click "Home" AND "Partner Page" from the top menu to visit our main website partners.quorumfcu.org.

10. To log out, click your name in the upper right corner, then click "logout."

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STARTING A NEW SUBMISSION

1. Click "Add New Loan" from the top menu.

2. Select the Loan Officer and Loan Processor by clicking the icon to the right next to each. Once both are selected, click "Next".

3. Drag & drop Mismo 3.4 data file into box or click "LOCAL DRIVE" to browse and locate file on your computer.

4. The file name will appear once import is complete. After, click "Go to Register Loan Form".

5. Carefully review and update/fill-in *all* fields in the Submission Verification section (under URLA in left-hand menu) and click "Step 1 – Start Submission". Once you complete the submission, you will no longer be able to edit these fields.

6. Any additional fields required for your Company will appear in a pop-up box. Fill in each field, then click Save.

7. Click "Step 1 – Start Submission". Once submitted, you will see a pop-up message appear that says "Success - Loan Successfully Saved", then will see the top ribbon populate with the Loan Number and other details.

8. The Loan Officer and Loan Processor selected when starting the submission will receive the confirmation below.

Quorum Partner Portal Submission Started, Additional Action Needed!

Encompass Notification <no-reply@ice.com>
To Brandi Ryce; Eleanor Macina

Tue 10/24/2023 11:14 AM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Partner,

Thank you for starting the application submission for HELOC Tester1 (loan number 231033866)!

Additional action is needed to complete the submission - please log back into the Quorum Partner Portal and complete the following steps:

1. Upload required supporting documents (per Submission Checklist)
- Login to the Portal
- Open loan file (from the Welcome tab under Recently Accessed Loans or Pipeline tab)
- Select 'Documents' from the menu on the left

9. Upload the Quorum HELOC Acknowledgement Form (must be signed by all borrowers). Click "Documents" from left-hand menu, use the Drag & Drop feature or click "Browse for Files" next to the respective folder to import the document from your computer.

10. Click "Step 2 – Complete Submission" under left-hand menu and then click "Continue" when prompted via pop-up box.

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11. A message in green across the top of the screen will appear as confirmation.

12. The Loan Officer and Loan Processor selected when starting the submission will also receive the below confirmation email.

Quorum Partner Portal - Submission Complete! (HELOC Tester1, loan number 231033866)

Encompass Notification <no-reply@ice.com>
To   Brandi Ryce; Eleanor Macina

Tue 10/24/2023 11:16 AM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Partner,

Thank you for completing the application submission for HELOC Tester1 (loan number 231033866)!

Current submission review/file setup turn time is approximately 1 business day. You will receive an email once your file is in line for underwriting, or if additional information is needed in order to submit to underwriting.

Log back into the Quorum Partner Portal at any time to check the status and upload additional documents.

To upload additional documents:
- Login to the Portal
- Open loan file (from the Welcome tab under Recently Accessed Loans or Pipeline tab)
- Select 'Documents' from the menu on the left

CHECK THE STATUS OF AN EXISTING SUBMISSION:

1. After logging in to TPO Connect, click "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. Click "Pipeline" from the top menu to return to your pipeline.

6. Click "Conditions" from the left sidebar to view outstanding conditions on the loan.

7. Click "Workflow" from the left sidebar to view important dates for each loan file.

8. Once a file is approved, you can access the Conditional Approval Letter from the Document area, or Workflow area by clicking the Workflow tab then clicking the paper icon next to the UW Approval Date.

UPLOAD ADDITIONAL DOCUMENTS TO AN EXISTING SUBMISSION:

1. Once logging into TPO Connect, click "Pipeline."

2. Double click on the desired loan submission.

3. Click "Documents."

4. Next to the "[Unassigned]" folder, click "Browse for files" or drag and drop.

5. Upload the desired document(s) such as Income, Assets, 1003, and more.

6. Once the upload is complete, the document will be displayed below. Click "Close and Refresh" to move forward.

7. On the Documents page, click "Comments" to add or view comments to the document folders available.

8. Type your comment and click "Add Comment." Please be advised that this will not automatically send an alert to Quorum.

9. Once making a comment, to send an alert to Quorum, click "Notify Lender" on the Conditions page.

ARCHIVING LOANS FROM PIPELINE

1. To archive (or hide) past loans from the Pipeline, click "Pipeline" from the top menu.

2. Click the checkbox next to the loan you would like to archive and click "Archive."

3. To sort loans by status, click the "Loan Status" dropdown arrow and change the default selection from "Current" to "Archived", or vice versa.

UNABLE TO LOGIN TO PARTNER PORTAL FORGOT PASSWORD:

1. Visit partners.quorumfcu.org & select "Portal Log In."

2. Enter username, check "Internal User" box and click "Continue."

3. Click "Forgot Password."

4. Type in your email address and click "Submit."

5. You will see the following message on-screen.

6. You will receive the following email. Click "Click here to access your account" to update your password.

7. Type in your email, create a new password and click "Reset Password."

8. Click "Continue."

9. Click "Click here to Log in" to access your account.