



# QUORUM PARTNER PORTAL

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

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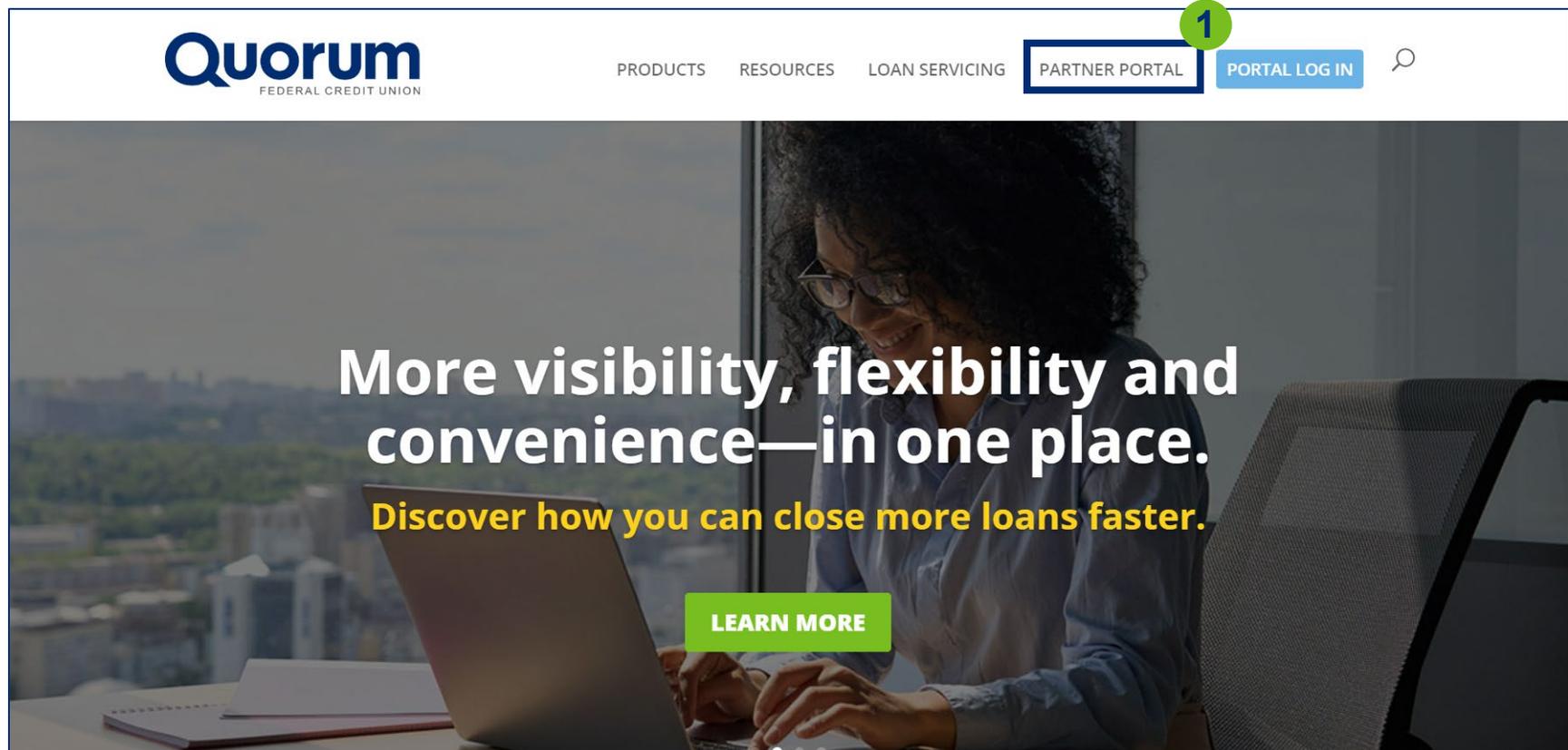
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# QUORUM PARTNER PORTAL

## NEW USER REGISTERING FOR ACCESS:

1. Visit [partners.quorumfcu.org](https://partners.quorumfcu.org) & select “Partner Portal.”





## 2. Click “Sign Up Now” in the “New User Sign Up” box.

**Quorum**  
FEDERAL CREDIT UNION

PRODUCTS RESOURCES LOAN SERVICING PARTNER PORTAL PORTAL LOG IN

### Success is right at your fingertips.

Introducing the Quorum Partner Portal, powered by TPO Connect. Simple, streamlined and efficient, it’s ready to help you close more loans—and maximize profitability—faster than ever.

Take control with all your loans on a single platform and get the simplicity, visibility and flexibility you need to access key information and data at a glance.

It’s time to increase your competitive advantage and close more loans for maximum profitability. Sign up today—it’s fast and easy and help is just a click away.

**We look forward to putting our mortgage services to work for you!**  
**We help our business partners close loans for their borrowers efficiently and on time.**

**Registered User Log In**  
Existing users please log in here.  
PORTAL LOG IN

**New User Sign Up**  
New users please request access below.  
SIGN UP NOW



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

**Quorum**  
FEDERAL CREDIT UNION

PRODUCTS RESOURCES LOAN SERVICING PARTNER PORTAL PORTAL LOG IN

### 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

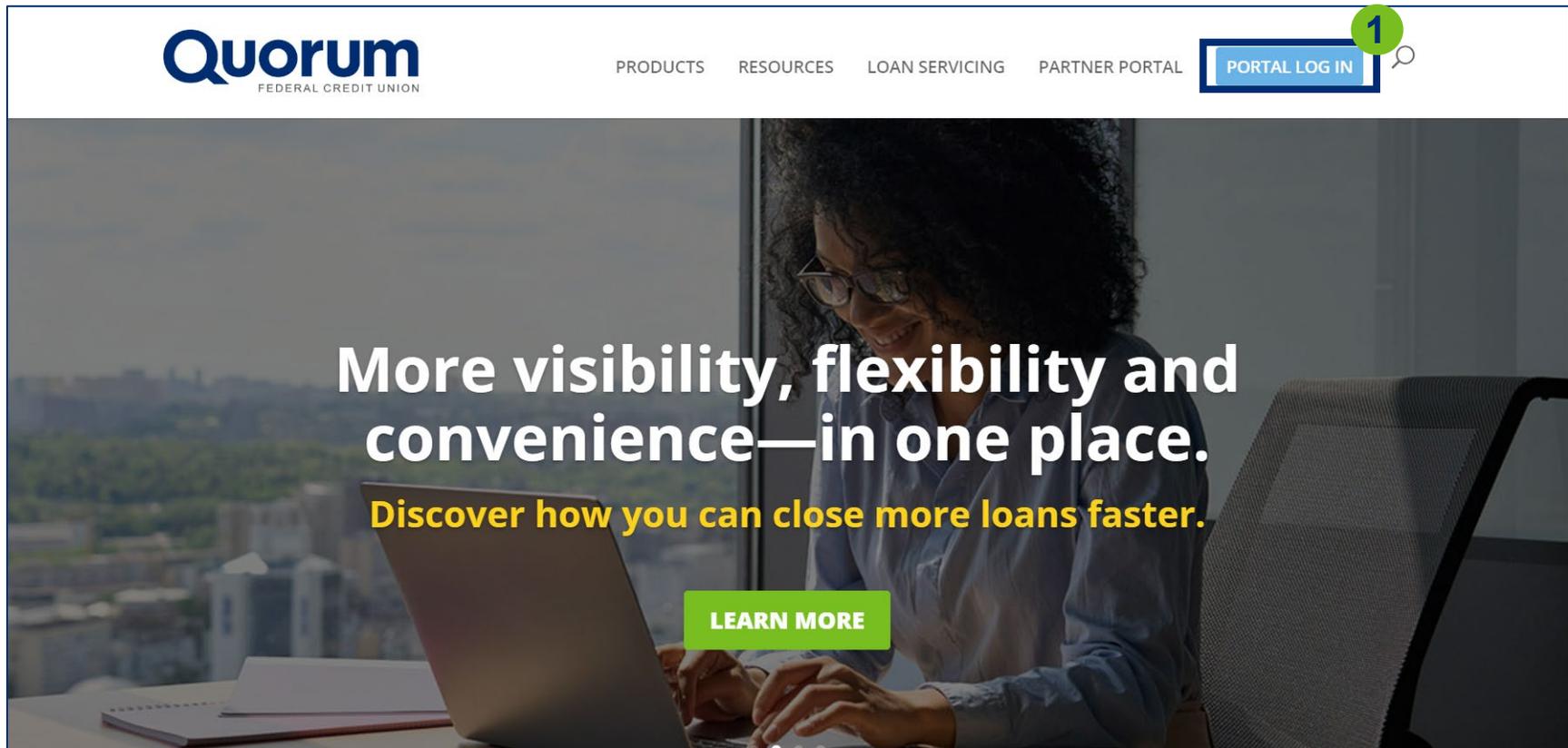
Loan Officer NMLS #



# QUORUM PARTNER PORTAL

## EXISTING USER LOGGING INTO THE PARTNER PORTAL:

1. Visit [partners.quorumfcu.org](https://partners.quorumfcu.org) & select “Portal Log In.”





## 2. Enter username and click “Continue.”

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." and navigation links for "HOME" and "RESOURCES". On the right, there are links for "CONTACT US" and "Login". A modal window titled "LOGIN" is centered on the screen, featuring a "User Name" input field, an "Internal User" checkbox, and a "Continue" button. A green circle with the number "2" is positioned over the "Continue" button, indicating the step described in the text above. The background of the portal includes a "Spring Special! Limited Time Offer!" section with a link to a Rate Matrix and Program Guidelines, a "Having Trouble Logging In?" section with a link to New User Sign Up, and a "Current Turn Times" section for HELOC with a list of submission, underwriting, and CTC timelines.



## 3. Enter password and click “Login.”

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CONTACT US Login

HOME ▾ RESOURCES ▾

**Spring Special! Limited Time Offer!**

- Visit <https://partners.quorumfcu.org/> to view *Rate Matrix and Program Guidelines*

**Having Trouble Logging In?**

Having troubles logging in? If it's been more than 30 days since your last log in, please click here and select New User Sign Up.

**Current Turn Times**

HELOC

- Submission: 1 business day
- Initial Underwriting (once submitted to Underwriting): 1 business day
- CTC: 1 business day

**LOGIN** ✕

lisa.jacobs@quorumfcu.org

Password

Remember Me

Login

[Forgot Password?](#)



## PARTNER PORTAL OVERVIEW:

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

**Quorum**  
BANKING THAT'S GOOD. FOR YOU.

CONTACT US Lisa Silipino

WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Partner Page

**Recently Accessed Loans**

No data.

**Company Announcements**

EXCITING ENHANCEMENTS - live Monday, 10/18/2021!  
10/18/2021 7:00 AM

**Lender Key Contacts**

Mortgage Sales Team - Primary  
855-436-3588  
MortgageSales@quorumfcu.org



# QUORUM PARTNER PORTAL

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

**Quorum**  
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CONTACT US Lisa Siliipino

WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Partner Page

**Recently Accessed Loans**

No data.

**Company Announcements**

EXCITING ENHANCEMENTS - live Monday, 10/18/2021!  
10/18/2021 7:00 AM

**Lender Key Contacts**

Mortgage Sales Team - Primary  
855-436-3588  
MortgageSales@quorumfcu.org



# QUORUM PARTNER PORTAL

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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." At the top right, there are links for "CONTACT US" and a user profile for "Lisa Sillipino". Below the logo is a dark blue navigation bar with menu items: "WELCOME", "PIPELINE", "ADD NEW LOAN", "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS". A dropdown menu for "HOME" is open, showing "Partner Page". The main content area is divided into three columns. The first column, "Recently Accessed Loans", shows "No data." The second column, "Company Announcements", features a message: "EXCITING ENHANCEMENTS - live Monday, 10/18/2021! 10/18/2021 7:00 AM". The third column, "Lender Key Contacts", is highlighted with a blue border and a green circle with the number "3". It contains the following information: "Mortgage Sales Team - Primary", "855-436-3588", and "MortgageSales@quorumfcu.org".



# QUORUM PARTNER PORTAL

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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU.". The top right corner shows "CONTACT US" and a user profile "Lisa Silipino". The main navigation bar includes "WELCOME", "PIPELINE" (highlighted with a green circle and the number 4), "ADD NEW LOAN", "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS". Below the navigation bar is a search area with "Find Loan" and a search box containing "Loan #", along with "Advanced Filter", "Archive", and a print icon. The main content area features a table with the following headers: , Current Loan Status, Application Date, Loan #, Borrower Name, Next Expected Milestone, Underwriting Approval Date, Loan Amt, and HELOC Initial Advance. On the left side, there is a sidebar with "LOAN OPTIONS" and "VIEW" (All loans, My Loans) and "LOAN STATUS" (Current, Archived) sections.



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.

5

Welcome Pipeline **Add New Loan** Documents

Contact Us Broker Test User

1 Select Channel 2 **Select Contacts** 3 Loan Data Source

Select Contacts

ROLE	CONTACT NAME	COMPANY NAME	EMAIL	CELL #	OFFICE #	FAX #	
Originator Contacts							
Loan Officer				-	-	-	
Loan Processor				-	-	-	

Back Next

Start



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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." On the top right, there are links for "CONTACT US" and a user profile for "Lisa Sillipino". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING (highlighted with a green circle and the number 6), HOME, RESOURCES, and DOCUMENTS. A dropdown menu for "REPORTING" is open, showing "Partner Page". Below the navigation bar, the main content area is divided into three columns: "Recently Accessed Loans" (containing a "No data." message), "Company Announcements" (featuring a live announcement titled "EXCITING ENHANCEMENTS - live Monday, 10/18/2021!" dated 10/18/2021 7:00 AM), and "Lender Key Contacts" (listing the "Mortgage Sales Team - Primary" with phone number 855-436-3588 and email MortgageSales@quorumfcu.org). Each column has a pagination indicator at the bottom right, showing "1" of 1 items.



7. Click the dropdown arrow next to “Select a Report.”

The screenshot displays the Quorum Partner Portal interface. At the top right, there are links for 'CONTACT US' and a user profile for 'Nicholas'. A dark blue navigation bar contains the following menu items: 'TPO CONTACTS', 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'REPORTING', 'HOME', 'RESOURCES', and 'DOCUMENTS'. Below the navigation bar, the text 'Select a report' is followed by a dropdown arrow icon. A green circle with the number '7' is overlaid on the dropdown arrow. The dropdown menu is open, showing two options: 'Withdrawn and Denied Loans' and 'Closed Loans'. Below the dropdown menu, there is a calendar icon and the text: 'Select an option from the dropdown menu above'.



# QUORUM PARTNER PORTAL

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.

CONTACT US Nicholas

TPO CONTACTS WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Select a report

- Withdrawn and Denied Loans
- Closed Loans

Select an option from the dropdown menu above



# QUORUM PARTNER PORTAL

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

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CONTACT US Lisa Silipino

WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Partner Page

**Recently Accessed Loans**

No data.

**Company Announcements**

EXCITING ENHANCEMENTS - live Monday, 10/18/2021!  
10/18/2021 7:00 AM

**Lender Key Contacts**

Mortgage Sales Team - Primary  
855-436-3588  
MortgageSales@quorumfcu.org



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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." The top right corner shows the user name "Lisa Silipino" with a dropdown arrow. Below the user name is a menu with options: "Change Password" and "Logout". A green circle with the number "7" highlights the "Logout" button. A dark blue navigation bar contains the following menu items: "WELCOME", "PIPELINE", "ADD NEW LOAN", "REPORTING", "HOME" (with a dropdown arrow), "RESOURCES" (with a dropdown arrow), and "DOCUMENTS". The main content area is divided into three columns: "Recently Accessed Loans" (containing a "No data." message), "Company Announcements" (with a notice: "EXCITING ENHANCEMENTS - live Monday, 10/18/2021! 10/18/2021 7:00 AM"), and "Lender Key Contacts" (listing "Mortgage Sales Team - Primary" with phone number "855-436-3588" and email "MortgageSales@quorumfcu.org"). Each column has a pagination indicator at the bottom right, showing "1" between left and right arrows.



## STARTING A NEW SUBMISSION

1. Click “Add New Loan” from the top menu.

The screenshot displays the Quorum Partner Portal dashboard. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU.". On the top right, there are links for "CONTACT US" and a user profile for "Lisa Silipino". A dark blue navigation bar contains the following menu items: "WELCOME", "PIPELINE", "ADD NEW LOAN" (highlighted with a green circle and the number 1), "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS". A dropdown menu for "ADD NEW LOAN" is open, showing "Partner Page". Below the navigation bar, the dashboard is divided into three columns: "Recently Accessed Loans" (containing a "No data." message), "Company Announcements" (featuring an announcement titled "EXCITING ENHANCEMENTS - live Monday, 10/18/2021!" dated 10/18/2021 7:00 AM), and "Lender Key Contacts" (listing the "Mortgage Sales Team - Primary" with phone number 855-436-3588 and email MortgageSales@quorumfcu.org). Each of the three content panels has a pagination control at the bottom right, showing a page number "1" and navigation arrows.



# QUORUM PARTNER PORTAL

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

Start

1 2 3  
Select Channel Select Contacts Loan Data Source

Originator Contacts

ROLE	CONTACT NAME	COMPANY NAME	EMAIL	CELL #	OFFICE #	FAX #
Loan Officer				-	-	-
Loan Processor				-	-	-

Back Next



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

3

Loan Data Source

**Data Format**

Import Loan Data From ULAD / ILAD (MISMO 3.4) File

Manual

**Upload**

Browse: [LOCAL DRIVE](#)

Drop Files here to upload

Supported: 1003, txt, xml

Please Note: Downgrading a 3.4 file to a 2009 URLA may cause lost or inaccurate data.

[Back](#) [Go to Register Loan Form](#)



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

Contact Us Broker Test User

Welcome Pipeline Add New Loan Documents

Select Channel Select Contacts **3** Loan Data Source

### Loan Data Source

**Data Format**

Import Loan Data From ULAD / ILAD (MISMO 3.4) File

Manual

**Upload**

Browse: LOCAL DRIVE

Drop Files here to upload

Supported: 1003, txt, xml

Please Note: Downgrading a 3.4 file to a 2009 URLA may cause lost or inaccurate data.

Back Go to Register Loan Form



- 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.

CONTACT US Ellie Macina

WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Loan #: - Loan Type: - Interest Rate: -  
Total Loan Am... - Loan Purpose: - Loan To Value... -

Activities Workflow

LOAN SUMMARY

URLA

Submission Verification

DOCUMENTS

CONDITIONS

LOAN ACTIONS

Step 2 - Submit Loan

### Submission Verification

Select Borrower Pair  
HELOC Tester1 & HELOC Tester2

Step 1 - Start Submission

IMPORTANT! Please review/update the below and upload initial documents at time of submission.

Loan Type <sup>\*</sup>  
Select an Option Required Field

Subject Property Occupancy Status <sup>\*</sup>  
Primary

Loan Amount <sup>\*</sup>  
250000

HELOC Initial Advance <sup>\*</sup>  
Required Field

Loan Purpose <sup>\*</sup>  
Cash-Out Refi

HELOC Purpose <sup>\*</sup>  
Select an Option



# QUORUM PARTNER PORTAL

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

CONTACT US Ellie Macina

WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Loan #: - Loan Type: - Interest Rate: -  
Total Loan Am... - Loan Purpose: - Loan To Value... -

Activities Workflow

LOAN SUMMARY

URLA

Submission Verification

DOCUMENTS

CONDITIONS

LOAN ACTIONS

Step 2 - Submit Loan

Submit Error Details

FIELD ID	REQUIRED FIELD NAME	FORM	FIELD
CX.BROKER...	Borrower Paid Broker Comp	Not available on Form	Select an Option
CX.BROKER...	Broker & Representative	Not available on Form	Select an Option

Cancel Save

Loan Type: HELOC

Loan Amount: 250000

Loan Purpose: Cash-Out Refi

Subject Property Appraised Value: 2500000

Subject Property Occupancy Status: Primary

HELOC Initial Advance: 50000

HELOC Purpose: Stand Alone

Subject Property Estimated Value: 2500000



# QUORUM PARTNER PORTAL

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.

The screenshot displays the Quorum Partner Portal interface. At the top right, there are links for "CONTACT US" and the user name "Ellie Macina". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME, RESOURCES, and DOCUMENTS. Below this bar, there are several data points: Loan #, Total Loan Am..., Loan Type, Loan Purpose, Interest Rate, and Loan To Value... A left-hand sidebar contains sections for "Activities" and "Workflow", with "LOAN SUMMARY" and "URLA" listed under "Activities", and "Submission Verification", "DOCUMENTS", "CONDITIONS", and "LOAN ACTIONS" under "Workflow". The "Submission Verification" section is currently active. A "Success" pop-up message is visible in the top right corner, stating "Success" and "Loan saved successfully...", with a "Step 1 - Start Submission" button below it. The main content area is titled "Submission Verification" and features a "Select Borrower Pair" dropdown menu with "HELOC Tester1 & HELOC Tester2" selected. Below this, there is a form with the following fields: Loan Type (HELOC), Subject Property Occupancy Status (Primary), Loan Amount (250000), HELOC Initial Advance (50000), Loan Purpose (Cash-Out Refi), HELOC Purpose (Stand Alone), Subject Property Appraised Value (2500000), and Subject Property Estimated Value (2500000). A red dot is present next to each field label. A warning message at the top of the form reads: "IMPORTANT! Please review/update the below and upload initial documents at time of submission."



# QUORUM PARTNER PORTAL

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

8



# QUORUM PARTNER PORTAL

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.

The screenshot displays the Quorum Partner Portal interface. At the top right, there are links for "CONTACT US" and the user name "Ellie Macine". The main navigation bar includes "WELCOME", "PIPELINE", "ADD NEW LOAN", "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS". The "DOCUMENTS" section is active, showing a list of documents for loan "HELOC Tester1". The loan details include Loan #: 231033866, Total Loan Am... \$250,000.00, Loan Type: HELOC, Loan Purpose: Cash-Out Refinance, Interest Rate: 100.000%, and Loan To Value... 10.00% / 55.92%. The "Started" date is "Wh 2nd". The left-hand menu is visible, with "DOCUMENTS" highlighted. The main content area lists documents such as "HOMEOWNER'S INSURANCE POLICY", "IDENTIFICATION FORMS", "MORTGAGE SUPPORTING", "QUORUM - HELOC ACKNOWLEDGMENT", "QUORUM LOAN SUBMISSION SHEET", "STATEMENT OF DENIAL - QUORUM", and "TITLE REPORT". Each document has a "Comments" icon and a "Drag & Drop files here or Browse for files" button. A red circle with the number "9" highlights the "Browse for files" button for the "QUORUM - HELOC ACKNOWLEDGMENT" document.



# QUORUM PARTNER PORTAL

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

The screenshot displays the Quorum Partner Portal interface. At the top, there is a navigation bar with links: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME, and RESOURCES. A user profile for 'Ellie Macina' is visible in the top right. A central pop-up dialog box asks 'Are you sure you want to proceed?' with 'Cancel' and 'Continue' buttons. The 'Continue' button is highlighted with a green circle containing the number '10'. Below the pop-up, the main content area shows the loan details for 'HELOC Tester1' (402 test street, New York, NY, 10035, Quorum TEST). The loan amount is \$250,000.00, and the loan purpose is 'Cash-Out Refinance'. The interest rate is 100.000% (Loan To Value: 10.00% / 55.92%). The loan is in the 'Started' phase, with 'Wh' and '2nd' tabs. The left-hand menu is open, showing 'LOAN ACTIONS' with 'Step 2 - Submit Loan' selected. The main content area is titled 'Step 2 - Submit Loan' and includes a 'Quick Tips!' section: 'You will receive an [initial confirmation email](#) once your submission is successfully started and will receive a [second confirmation email](#) once it is successfully completed.' Below this is an 'Overview' table:

Application Date	Status	Initial Step 2 - Submit Loan Date	Last Step 2 - Submit Loan Date
10/24/2023	Not Submitted	-	-

The 'Borrower Information' section shows a dropdown menu for 'Select Borrower Pair' with the selected option '(1) HELOC Tester1 & HELOC Tester2'. Below this, the 'Borrower' and 'Co-Borrower' sections are visible, both with 'HELOC' entered in the 'First Name' field.



# QUORUM PARTNER PORTAL

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

The screenshot displays the Quorum Partner Portal interface. At the top right, there are links for "CONTACT US" and the user name "Elle Macina". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME, RESOURCES, and DOCUMENTS. Below this, the loan details for "HELOC Tester1" are shown, including the address "402 test street, New York, NY, 10035 Quorum TEST", Loan #: 231033866, Total Loan Am...: \$250,000.00, Loan Type: HELOC, Loan Purpose: Cash-Out Refinance, Interest Rate: 100.000%, and Loan To Value...: 10.00% / 55.92%. A green confirmation banner at the top of the main content area reads "Your loan was submitted Successfully." with a checkmark icon. The main content area is titled "Step 2 - Submit Loan" and includes "Quick Tips!" stating that users will receive an initial confirmation email upon successful start and a second confirmation email upon completion. Below this is an "Overview" table:

Overview			
Application Date	Status	Initial Step 2 - Submit Loan Date	Last Step 2 - Submit Loan Date
10/24/2023	Submitted	10/24/2023	10/24/2023

Under "Borrower Information", there is a "Select Borrower Pair" dropdown menu with the selected option "(1) HELOC Tester1 & HELOC Tester2". Below this is a table with columns for "Borrower" and "Co-Borrower".



# QUORUM PARTNER PORTAL

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

**12**

The screenshot shows an Outlook email interface. At the top is a ribbon with various action buttons: Delete, Respond, Share to Teams, All Apps, Quick Steps, Move, Tags, Editing, Immersive, Translate, Zoom, Reply with Scheduling Poll, Viva Insights, and Report Phishing. Below the ribbon is the email header: "Quorum Partner Portal - Submission Complete! (HELOC Tester1, loan number 231033866)". The sender is "Encompass Notification <no-reply@ice.com>" with a profile picture showing "EN". The recipient is "To: Brandi Ryce; Eleanor Macina". The email body contains a caution message, a greeting "Dear Partner,", a thank you message, a review timeline, and instructions on how to log back into the portal and upload documents.

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

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

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.

**Quorum**  
BANKING THAT'S GOOD. FOR YOU.

CONTACT US Lisa Sillipino

WELCOME **PIPELINE** ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Find Loan

LOAN OPTIONS	<input type="checkbox"/>	Current Loan Status	Application Date	Loan #	Borrower Name	Next Expected Milestone	Underwriting Approval Date	Loan Amt	HELOC Initial Advance
<b>VIEW</b>	<input type="checkbox"/>	Active Loan	05/25/2023	230531168	Customer JR, Ken N	Initial LO Review		75,000.00	75,000.00

All loans  
 My Loans

**LOAN STATUS**

Current  
 Archived

30 per page 1



# QUORUM PARTNER PORTAL

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.”

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU.". On the top right, there are links for "CONTACT US" and a user profile for "Lisa Sillipino". A dark blue navigation bar contains menu items: "WELCOME", "PIPELINE", "ADD NEW LOAN", "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS". Below this is a search bar with the placeholder text "Find Loan | Loan #" and a magnifying glass icon. A green circle with the number "2" is overlaid on the search bar. To the right of the search bar are buttons for "Advanced Filter", "Archive", and a printer icon. On the left side, there is a sidebar with "LOAN OPTIONS" and "VIEW" sections. The "VIEW" section has radio buttons for "All loans" (selected), "My Loans", and "LOAN STATUS" section has radio buttons for "Current" (selected) and "Archived". The main content area is a table with the following columns: "Current Loan Status", "Application Date", "Loan #", "Borrower Name", "Next Expected Milestone", "Underwriting Approval Date", "Loan Amt", and "HELOC Initial Advance". A single row of data is visible: "Active Loan", "05/25/2023", "230531168", "Customer JR, Ken N", "Initial LO Review", "75,000.00", and "75,000.00". At the bottom right, there is a pagination control showing "30 per page" and a page number "1".

Current Loan Status	Application Date	Loan #	Borrower Name	Next Expected Milestone	Underwriting Approval Date	Loan Amt	HELOC Initial Advance
Active Loan	05/25/2023	230531168	Customer JR, Ken N	Initial LO Review		75,000.00	75,000.00



# QUORUM PARTNER PORTAL

3. Double click on the desired loan submission.

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU.". The top right corner shows "CONTACT US" and a user profile for "Lisa Sillipino". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME (with a dropdown arrow), RESOURCES (with a dropdown arrow), and DOCUMENTS. Below the navigation bar is a search area with the text "Find Loan" and a search box containing "Loan #". To the right of the search box are buttons for "Advanced Filter", "Archive", and a print icon. A left-hand sidebar contains "LOAN OPTIONS" with a "VIEW" section (radio buttons for "All loans" and "My Loans") and a "LOAN STATUS" section (radio buttons for "Current" and "Archived"). The main content area features a table with the following columns: Current Loan Status, Application Date, Loan #, Borrower Name, Next Expected Milestone, Underwriting Approval Date, Loan Amt, and HELOC Initial Advance. The first row of the table is highlighted with a blue border and a green circle containing the number 3. The data in this row is: Active Loan, 05/25/2023, 230531168, Customer JR, Ken N, Initial LO Review, 75,000.00, and 75,000.00. At the bottom right of the table, there is a pagination control showing "30 per page" and a page number "1".

Current Loan Status	Application Date	Loan #	Borrower Name	Next Expected Milestone	Underwriting Approval Date	Loan Amt	HELOC Initial Advance
Active Loan	05/25/2023	230531168	Customer JR, Ken N	Initial LO Review		75,000.00	75,000.00



## 4. View updates within the submission.

**Quorum**  
BANKING THAT'S GOOD. FOR YOU.

CONTACT US Lisa Sillipino

WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

**Ken Customer**  
10655 Birch St, Burbank, CA, 91502-1234  
Quorum TEST

Loan #: 230531168  
Total Loan Am... **\$75,000.00**

Loan Type: **HELOC**  
Loan Purpose: **Purchase**

Interest Rate: **91.750%**  
Loan To Value... **22.06% / 22.06%**

Started  
Wh 2nd

Activities Workflow

- LOAN SUMMARY
- URLA
- Submission Verification
- DOCUMENTS
- CONDITIONS
- LOAN ACTIONS
- Step 2 - Submit Loan

**\$75,000.00**  
22.06% / 22.06% / 22.06%

Base Loan Amount	MI, FF, MIP Financed
\$75,000.00	\$0.00
Primary Mortgage Total	
\$0.00	

**Not Locked 91.750%**

Amortization Type	Amortization Term
ARM	240

**Started**  
05/25/2023

Conditions

Open 0  
[Show Details](#)

Down Payment	P & I
\$265,000	\$0
Reserves	DTI
\$257,400.00	45.015%/48.664%

**Credit Information**



5. Click "Pipeline" from the top menu to return to your pipeline.

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." The top right corner contains "CONTACT US" and a user profile for "Lisa Sillipino". A dark blue navigation bar includes "WELCOME", "PIPELINE" (highlighted with a green circle and the number 5), "ADD NEW LOAN", "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS".

Below the navigation bar, the user's name "Ken Customer" and address "10655 Birch St, Burbank, CA, 91502-1234, Quorum TEST" are shown. To the right, loan details are provided: Loan #: 230531168, Total Loan Am...: \$75,000.00, Loan Type: HELOC, Loan Purpose: Purchase, Interest Rate: 91.750%, and Loan To Value...: 22.06% / 22.06%. A "Started" section shows "Wh" and "2nd" with icons for a lock, envelope, and user.

The main content area is divided into several sections:

- Activities / Workflow:** A sidebar menu with options like LOAN SUMMARY, URLA, DOCUMENTS, CONDITIONS, and LOAN ACTIONS.
- Loan Summary:** A card showing a total of \$75,000.00 with interest rates of 22.06% / 22.06% / 22.06%. It includes a table for Base Loan Amount (\$75,000.00), MI, FF, MIP Financed (\$0.00), and Primary Mortgage Total (\$0.00).
- Not Locked:** A card with a lock icon and the text "Not Locked 91.750%".
- Amortization:** A card showing Amortization Type as ARM and Amortization Term as 240.
- Started:** A card showing the start date as 05/25/2023 and a table for Conditions with "Open" at 0. It also includes a "Show Details" link.
- Down Payment / P & I:** A table showing Down Payment of \$265,000 and P & I of \$0.
- Reserves / DTI:** A table showing Reserves of \$257,400.00 and DTI of 45.015%/48.664%.
- Credit Information:** A partially visible card at the bottom.



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

Conditions (37)

NAME	EXTERNAL DESCRIPTION	PRIOR TO	DISPOSITION	CATEGORY	PUBLISHED	STATUS	TYPE
Income - Rental Departing Residence (Leas...	Income - Rental Departing Residence (Lease Agree...	Approval	✓	Income	01/24/2025	Waived	Broker Responsibility
Income - Rental Schedule E (Borrower)	Income - Rental Schedule E (Borrower); Provide cop...	Approval	✓	Income	01/24/2025	Waived	Broker Responsibility
Income - Tax Returns Two Years (Personal a...	Income - Tax Returns Two Years (Personal and Busi...	Approval	✓	Income	01/24/2025	Waived	Broker Responsibility
(PTF) Income - Tax Returns (Signed)	(PTF) Income - Tax Returns (Signed); Provide signed...	Funding	✓	Income	01/24/2025	Waived	Broker Responsibility
Business Ownership	CPA to provide a signed and dated letter to confirm ...	Approval	⌚	Income	01/24/2025	Rejected	Broker Responsibility
Property - HOA Statement	Property - HOA Statement: Provide copy of Homeo...	Approval	⌚	Property	01/24/2025	Fulfilled	Broker Responsibility
Initial Disbursement Confirmation	Initial Disbursement Confirmation: Provide final con...	Approval	⌚	Miscellaneous	01/24/2025	Fulfilled	Broker Responsibility
(PTD) Title - Vesting Confirmation	(PTD) Title - Vesting Confirmation: Provide confirmat...	Docs	⌚	Property	01/24/2025	Fulfilled	Broker Responsibility
Misc Condition	Provide supporting documentation evidencing 5 Co...	Approval	⌚	Miscellaneous	01/24/2025	Fulfilled	Quorum Responsibility
Membership - Identification	Membership - Identification: Provide valid, non-expir...	Approval	✓	Miscellaneous	01/24/2025	Cleared	Broker Responsibility
Valuation - AVM	**Low Value** Valuation - AVM: Quorum obtain satisf...	Approval	✓	Property	01/24/2025	Cleared	Quorum Responsibility
Property - Flood Certification	Property - Flood Certification: Quorum obtain Flood ...	Approval	✓	Property	01/24/2025	Cleared	Quorum Responsibility
Income - Bank Statement (12 months)	Income - Bank Statement (12 months); Provide copie...	Approval	✓	Income	01/24/2025	Cleared	Broker Responsibility
Valuation - Full Appraisal	Valuation - Full Appraisal: Quorum obtain satisfactor...	Approval	✓	Property	01/24/2025	Cleared	Quorum Responsibility



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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." The top right corner includes "CONTACT US" and a user profile for "Lisa Sillipino". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME (with a dropdown arrow), RESOURCES (with a dropdown arrow), and DOCUMENTS. Below this bar, the user's name "Ken Customer" and address "10655 Birch St, Burbank, CA, 91502-1234, Quorum TEST" are shown on the left. On the right, loan details are provided: Loan #: 230531168, Total Loan Am...: \$75,000.00, Loan Type: HELOC, Loan Purpose: Purchase, Interest Rate: 91.750%, and Loan To Value...: 22.06% / 22.06%. A "Started" section shows "Wh" and "2nd" tabs, along with icons for a lock, envelope, and user. The left sidebar has "Activities" and "Workflow" tabs, with "Workflow" highlighted and a green circle containing the number "7" next to it. The main content area is divided into several panels: a "LOAN SUMMARY" panel showing a loan amount of \$75,000.00 and rates of 22.06% / 22.06% / 22.06%; a "Started" panel with the date 05/25/2023 and a table of conditions; a "Not Locked 91.750%" panel with an open lock icon; and a "Credit Information" panel. The sidebar also lists "URLA", "PRODUCT PRICING & LOCK", "DOCUMENTS", "CONDITIONS", and "LOAN ACTIONS" with a sub-item "Step 2 - Complete Sub...".



# QUORUM PARTNER PORTAL

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.

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." and a "CONTACT US" link with the name "Lisa Siliplino". A navigation bar includes "WELCOME", "PIPELINE", "ADD NEW LOAN", "REPORTING", "HOME", "RESOURCES", and "DOCUMENTS".

Customer information for "Ken Customer" is shown, including the address "10655 Birch St, Burbank, CA, 91502-1234" and "Quorum TEST". Loan details include: Loan #: 230531168, Total Loan Am...: \$75,000.00, Loan Type: HELOC, Loan Purpose: Purchase, Interest Rate: 91.750%, and Loan To Value...: 22.06% / 22.06%. A "Started" button is visible.

The "Workflow" tab is active, showing a list of "Key Dates":

- Est Closing Date: 10/31/2023
- Registration Date: 9/15/2023
- Initial Submittal Date: 9/22/2023
- Suspended Date: 9/23/2023
- UW Approval Date: 10/4/2023

A green circle with the number "8" highlights the "UW Approval Date" entry, which has a document icon next to it. The main content area shows a loan amount of \$75,000.00 with a rate of 22.06% / 22.06% / 22.06%. It also displays "Started" on 05/25/2023, "Conditions" (Open: 0), "Down Payment" (\$265,000), "Reserves" (\$257,400.00), and "Not Locked 91.750%".



## UPLOAD ADDITIONAL DOCUMENTS TO AN EXISTING SUBMISSION:

1. Once logging into TPO Connect, click “Pipeline.”

The screenshot shows the Quorum Partner Portal interface. The top navigation bar includes 'WELCOME', 'PIPELINE' (highlighted with a green circle and the number 1), 'ADD NEW LOAN', 'REPORTING', 'HOME', 'RESOURCES', and 'DOCUMENTS'. Below the navigation bar is a search area with 'Find Loan' and a search box containing 'Loan #'. There are also buttons for 'Advanced Filter', 'Archive', and a print icon. The main content area displays a table of loans with the following columns: Current Loan Status, Application Date, Loan #, Borrower Name, Next Expected Milestone, Underwriting Approval Date, Loan Amt, and HELOC Initial Advance. The table contains one row of data: Active Loan, 05/25/2023, 230531168, Customer JR, Ken N, Initial LO Review, 75,000.00, and 75,000.00. On the left side, there is a sidebar with 'LOAN OPTIONS' (checkbox), 'VIEW' (radio buttons for 'All loans' and 'My Loans'), and 'LOAN STATUS' (radio buttons for 'Current' and 'Archived'). At the bottom right, there is a pagination control showing '30 per page' and a page number '1'.

Current Loan Status	Application Date	Loan #	Borrower Name	Next Expected Milestone	Underwriting Approval Date	Loan Amt	HELOC Initial Advance
Active Loan	05/25/2023	230531168	Customer JR, Ken N	Initial LO Review		75,000.00	75,000.00



# QUORUM PARTNER PORTAL

2. Double click on the desired loan submission.

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU.". On the top right, there are links for "CONTACT US" and a user profile for "Lisa Sillipino". Below the header is a navigation menu with items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME, RESOURCES, and DOCUMENTS. A search bar labeled "Find Loan" with a dropdown arrow and a search icon is present, along with buttons for "Advanced Filter", "Archive", and a print icon. The main content area features a table with the following columns: Current Loan Status, Application Date, Loan #, Borrower Name, Next Expected Milestone, Underwriting Approval Date, Loan Amt, and HELOC Initial Advance. The first row of the table is highlighted with a blue border and a green circle containing the number 2. The table data is as follows:

<input type="checkbox"/>	Current Loan Status	Application Date	Loan #	Borrower Name	Next Expected Milestone	Underwriting Approval Date	Loan Amt	HELOC Initial Advance
<input type="checkbox"/>	Active Loan	05/25/2023	230531168	Customer JR, Ken N	Initial LO Review		75,000.00	75,000.00

On the left side, there is a sidebar with "LOAN OPTIONS" and "VIEW" sections. Under "VIEW", there are radio buttons for "All loans" (selected) and "My Loans". Under "LOAN STATUS", there are radio buttons for "Current" (selected) and "Archived". At the bottom right of the table, there is a pagination control showing "30 per page" and a page number "1".



## 3. Click “Documents.”

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." The top right corner includes a "CONTACT US" link and a user profile for "Lisa Sillipino". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME (with a dropdown arrow), RESOURCES (with a dropdown arrow), and DOCUMENTS (highlighted in white). Below the navigation bar, the user's name "Ken Customer" and address "10655 Birch St, Burbank, CA, 91502-1234, Quorum TEST" are shown on the left. On the right, loan details are displayed: Loan #: 230531168, Total Loan Am...: \$75,000.00, Loan Type: HELOC, Loan Purpose: Purchase, Interest Rate: 91.750%, and Loan To Value...: 22.06% / 22.06%. A "Started" section shows "Wh" and "2nd" tabs, along with icons for a lock, envelope, and user profile. A left-hand sidebar contains "Activities" and "Workflow" tabs. Under "Workflow", the "DOCUMENTS" option is highlighted with a green circle containing the number "3". Other sidebar options include "LOAN SUMMARY", "URLA", "PRODUCT PRICING & LOCK", "CONDITIONS", and "LOAN ACTIONS". The main content area shows a "Loan Summary" card with a total of \$75,000.00 and interest rates of 22.06% / 22.06% / 22.06%. Below this, a "Not Locked 91.750%" status is shown with a lock icon. A "Started" card displays the date 05/25/2023 and a table of conditions. The table shows "Open" conditions with a value of 0, and "Down Payment" of \$265,000. A "Reserves" table shows \$257,400.00 and a DTI of 45.015%/48.664%. A "Credit Information" card is partially visible at the bottom.

**Ken Customer**  
10655 Birch St, Burbank, CA, 91502-1234  
Quorum TEST

Loan #: 230531168  
Total Loan Am...: \$75,000.00  
Loan Type: HELOC  
Loan Purpose: Purchase  
Interest Rate: 91.750%  
Loan To Value...: 22.06% / 22.06%

Started  
Wh 2nd

**Activities** | Workflow

**LOAN SUMMARY**

URLA

PRODUCT PRICING & LOCK

**3** DOCUMENTS

CONDITIONS

LOAN ACTIONS

Step 2 - Complete Sub...

**\$75,000.00**  
22.06% / 22.06% / 22.06%

Base Loan Amount	MI, FF, MIP Financed
\$75,000.00	\$0.00
Primary Mortgage Total	
\$0.00	

**Not Locked 91.750%**

Amortization Type	Amortization Term
ARM	240

**Started**  
05/25/2023

Conditions

Open	0
------	---

[Show Details](#)

Down Payment	P & I
\$265,000	\$0
Reserves	DTI
\$257,400.00	45.015%/48.664%

**Credit Information**



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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." The top right shows "CONTACT US" and the user name "Lisa Silipino". A dark blue navigation bar contains links for WELCOME, PIPELINE, ADD NEW LOAN, REPORTING, HOME, RESOURCES, and DOCUMENTS. Below this, the loan details for "Ken Customer" are shown, including the address "10655 Birch St, Burbank, CA, 91502-1234" and loan information: Loan # 230531168, Total Loan Am... \$75,000.00, Loan Type: HELOC, Loan Purpose: Purchase, Interest Rate: 91.750%, and Loan To Value... 22.06% / 22.06%. The "Started" section shows "Wh" and "2nd" with icons for a lock, envelope, and user. A left sidebar contains navigation options: Activities, Workflow, LOAN SUMMARY, URLA, PRODUCT PRICING & LOCK, DOCUMENTS (highlighted), CONDITIONS, and LOAN ACTIONS. The main content area features "Quick Tips" and a document upload section. The upload section includes a "Max attachment size is 200 MB. View Supported Files." message and buttons for "Expand All", "Collapse All", "+ Add Document", and "Print Fax Cover Sheet". Below this, there are two document folders: "All Borrowers" and "FLOOD CERTIFICATE". The "All Borrowers" folder contains a sub-folder "[UNASSIGNED]". Next to the "[UNASSIGNED]" folder, there is a "Drag & Drop files here or" prompt and a "Browse for files" button, which is highlighted with a red box and a red circle containing the number 4. The "FLOOD CERTIFICATE" folder also has a "Browse for files" button. At the bottom, the customer name "Ken Customer" is displayed.



# QUORUM PARTNER PORTAL

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

The screenshot shows the Quorum Partner Portal interface. The top navigation bar includes 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'REPORTING', 'HOME', 'RESOURCES', and 'DOCUMENTS'. The main content area displays customer information for 'Ken Customer' and a sidebar with navigation options like 'LOAN SUMMARY', 'URLA', 'PRODUCT PRICING & LOCK', 'DOCUMENTS', 'CONDITIONS', and 'LOAN ACTIONS'. A 'Quick Tips!' section is visible, with the first tip stating: '1. Upload the HELOC Ack folders (select +Add Document Unassigned folder below)'. The second tip says: '2. Click Step 2 - Complete'. A Windows File Explorer window is open, showing the 'Desktop' folder. The file list includes: 'B2B - Success Measurement' (5/22/2023 11:05 AM), 'Google Chrome' (5/10/2023 8:20 AM), 'HELOC Acknowledgement Form - May 2023 (3)' (5/25/2023 10:22 AM), and 'Q-Submission Sheet Template - Mortgage Sale...' (5/25/2023 10:21 AM). A green circle with the number '5' is overlaid on the File Explorer window. The portal interface also shows a 'Max attachment size is 2' warning, 'All Borrowers' section with '[UNASSIGNED]', and 'FLOOD CERTIFICATE' section. The bottom right of the portal has 'Add Document' and 'Print Fax Cover Sheet' buttons, and 'Drag & Drop files here or Browse for files' options.



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

The screenshot displays the Quorum Partner Portal interface for a loan. At the top, the borrower's name is Ken Customer, with address 10655 Birch St, Burbank, CA, 91502-1234. Loan details include Loan #: 230531168, Total Loan Am... \$75,000.00, Loan Type: HELOC, Loan Purpose: Purchase, Interest Rate: 91.750%, and Loan To Value... 22.06% / 22.06%. The status is Started, with buttons for Wh, 2nd, and a user profile icon.

The left sidebar contains navigation options: Activities, Workflow, LOAN SUMMARY, URLA, PRODUCT PRICING & LOCK, DOCUMENTS (highlighted), CONDITIONS, and LOAN ACTIONS. Under LOAN ACTIONS, the current step is Step 2 - Complete Sub...

The main content area features a "Quick Tips!" section with instructions: 1. Upload the HELOC Acknowledgement and Loan Submission Sheet to their respective folders (select +Add Documents to add these folders), and all remaining documents to the Unassigned folder below using the Drag and Drop or Browse for File options. 2. Click Step 2 - Complete Submission (menu to left).

Below the tips, a message states "Max attachment size is 200 MB. View Supported Files." and provides buttons for Expand All, Collapse All, + Add Document, and Print Fax Cover Sheet. A "All Borrowers" section shows a dropdown for [UNASSIGNED] with a green circle containing the number 6. A "Drag & Drop files here or Browse for files" area contains two upload progress indicators for "HELOC Acknowled..." (1.20 MB, 100% Completed) and "Q-Submission Shee..." (1.39 MB, 100% Completed). A "Close and Refresh" button is located below the progress indicators.

At the bottom, a list of documents is shown: "HELOC Acknowledgement Form - May 2023 (3).pdf" (315 KB, 05/25/2023 10:24 AM, Lisa Sillipino) and "Q-Submission Sheet Template - Mortgage Sales - May 2023.pdf" (0 KB, 05/25/2023 10:24 AM, Lisa Sillipino). A "FLOOD CERTIFICATE" section is partially visible at the bottom with a "Comments" button and "Drag & Drop files here or Browse for files" area.



# QUORUM PARTNER PORTAL

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

The screenshot shows the Quorum Partner Portal interface. At the top, there is a navigation bar with links for TPO Contacts, Welcome, Pipeline, Add New Loan, Reporting, Home, Resources, and Documents. Below this, a header section displays loan information: Loan #, Total Loan Amount (\$145,070.00), Loan Type (HELOC), Loan Purpose (Cash-Out Refinance), Interest Rate (7.750%), and Loan To Value (18.13% / 65.00%). A 'Cond Approval' section shows 'Wh' and '2nd' with a red lock icon and a user profile icon.

The left sidebar contains a 'Documents' section with a 'Comments' link highlighted. The main content area shows a list of document folders under 'All Borrowers'. A blue box highlights the 'Comments' link for the first folder, '1003', with a green circle containing the number '7' above it. The page also includes a top navigation bar, a header with loan details, and a sidebar with 'Loan Actions'.

**Quick Tips for Initial Submission! *\*\*wholesale only\*\****

1. Upload the HELOC Acknowledgement to the 'Quorum - HELOC Acknowledgement' folder (select +Add Document button to add this folder if missing).
2. Click Step 2 - Submit Loan (menu to left).

**All Other Documents:**

- Upload all other documents to the [Unassigned] folder.
- You can see a history of documents previously uploaded to the [Unassigned] folder in the [Unassigned - Upload History] folder. **DO NOT** upload new documents to the [Unassigned - Upload History] folder.

Max attachment size is 200 MB. View Supported Files.

Expand All Collapse All + Add Document Print Fax Cover Sheet

All Borrowers		
▶ 1003	Comments	Drag & Drop files here or Browse for files
1003 - URLA	Comments	Drag & Drop files here or Browse for files
1008 - TRANSMITTAL SUMMARY	Comments	Drag & Drop files here or Browse for files
▶ [UNASSIGNED - UPLOAD HISTORY]	Comments	Drag & Drop files here or Browse for files
▶ [UNASSIGNED]	Comments	Drag & Drop files here or Browse for files
▶ BANK STATEMENTS	Comments	Drag & Drop files here or Browse for files
▶ DISCLOSURES	Comments	Drag & Drop files here or Browse for files



# QUORUM PARTNER PORTAL

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

The screenshot displays the Quorum Partner Portal interface. A modal window titled "Document Comments" is open for loan 1003. The modal contains a text input field with the placeholder "Add Comment" and a blue "Add Comment" button. A green circle with the number "8" is overlaid on the modal. The background shows the portal's navigation menu, loan details, and a list of documents with comment sections.

Document Comments

1003  
All Borrowers

Quick Tips for Initial Submission! \*whole  
1. Upload the HELOC Acknowledgement to the 'Quorum  
2. Click Step 2 - Submit Loan (menu to left).

All Other Documents:  
- Upload all other documents to the [Unassigned] folder.  
- You can see a history of documents previously uploaded  
the [Unassigned - Upload History] folder.

Max attachment size is 200 MB. View Support

All Borrowers

1003

1003 - URLA

1008 - TRANSMITTAL SUMMARY

[UNASSIGNED - UPLOAD HISTORY]

[UNASSIGNED]

BANK STATEMENTS

DISCLOSURES

Type: HELOC  
Purpose: Cash-Out Refinance  
Interest Rate: 7.750%  
Loan To Value: 18.13% / 65.00%  
Cond Approval: Wh 2nd

Expand All Collapse All + Add Document Print Fax Cover Sheet

Comments Drag & Drop files here or Browse for files



# QUORUM PARTNER PORTAL

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

Conditions (37)

NAME	EXTERNAL DESCRIPTION	PRIOR TO	DISPOSITION	CATEGORY	PUBLISHED
(PTD) Escrow Contact	(PTD) Escrow Contact: Provide escrow company contact inf...	Docs	🕒	Miscellaneous	02/20/2025
(PTD) Signing Date and Escrow Contact	(PTD) Signing Date and Escrow Contact: Provide signing da...	Docs	🕒	Miscellaneous	01/29/2025
(PTD) Title - Vesting Confirmation	(PTD) Title - Vesting Confirmation: Provide confirmation ther...	Docs	🕒	Property	01/24/2025
(PTF) Income - Tax Returns (Signed)	(PTF) Income - Tax Returns (Signed): Provide signed and da...	Funding	✅	Income	01/24/2025
(PTF) Tax Transcripts - Signed (at closing)	(PTF) Tax Transcripts - Signed (at closing): 4506C to be exe...	Funding	🕒	Miscellaneous	01/24/2025
Approved Terms	Approved Terms: The terms are as follows: Loan Amount - ...	Approval	🕒	Miscellaneous	01/24/2025
Assets - Bank Statements (Reserves)	Assets - Bank Statements (Reserves): Provide two most rec...	Approval	🕒	Assets	01/24/2025
Assets - Business Assets	Assets - Business Assets: Provide documentation for busin...	Approval	🕒	Assets	01/24/2025
Business Ownership	CPA to provide a signed and dated letter to confirm the Pu...	Approval	🕒	Income	01/24/2025
DTI Validation (Recent Index Change)	DTI Validation (Recent Index Change): Quorum Underwriter ...	Approval	🕒	Miscellaneous	01/24/2025
Income - Bank Statement (12 months)	Income - Bank Statement (12 months): Provide copies of mo...	Approval	✅	Income	01/24/2025
Income - Rental (Lease Agreement + 1 Year History)	**Need all lease agreements and proof of rent received. De...	Approval	🕒	Income	01/24/2025
Income - Rental Departing Residence (Lease Agree...	Income - Rental Departing Residence (Lease Agreement): P...	Approval	✅	Income	01/24/2025



## ARCHIVING LOANS FROM PIPELINE

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

The screenshot displays the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU.". On the top right, there are links for "CONTACT US" and a user profile for "Lisa Stipino". A dark blue navigation bar contains the following menu items: WELCOME, PIPELINE (highlighted with a green circle and the number 1), ADD NEW LOAN, REPORTING, HOME, RESOURCES, and DOCUMENTS. Below the navigation bar is a search area with a "Find Loan" label, a search input field containing "Loan #", a search icon, and buttons for "Advanced Filter", "Archive", and a printer icon. The main content area features a table with the following columns: Current Loan Status, Application Date, Loan #, Borrower Name, Next Expected Milestone, Underwriting Approval Date, Loan Amt, and HELOC Initial Advance. A sidebar on the left is titled "LOAN OPTIONS" and includes a "VIEW" section with radio buttons for "All loans" (selected) and "My Loans", and a "LOAN STATUS" section with radio buttons for "Current" (selected) and "Archived".



# QUORUM PARTNER PORTAL

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

CONTACT US Nicholas [dropdown]

TPO CONTACTS WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Pipeline [Loan # dropdown] Search [input]

Channel [dropdown] Wholesale View [dropdown] All Loans Loan Status [dropdown] Current

<input type="checkbox"/>	CURRENT LOAN STATUS	APPLICATION DATE	LOAN #	BORROWER NAME	NEXT EXPECTED MILESTONE	UNDERWRITING APPROVAL DATE	LOAN AMT	HELOC INITIAL ADVANCE	SUBJECT PROPERTY ADDRESS	S
<input checked="" type="checkbox"/>	Application approved but not accepted	09/15/2023	[REDACTED]	[REDACTED]	Initial UW Review	09/20/2023	\$150,000.00	150,000.00	[REDACTED]	M
<input type="checkbox"/>	Application approved but not accepted	08/25/2023	[REDACTED]	[REDACTED]	Processing	08/31/2023	\$250,000.00	250,000.00	[REDACTED]	C
<input type="checkbox"/>	Application denied	07/12/2023	[REDACTED]	[REDACTED]	Initial UW Review		\$37,893.00	37,893.00	[REDACTED]	M
<input type="checkbox"/>	Application denied	08/07/2023	[REDACTED]	[REDACTED]	Suspended	08/15/2023	\$150,000.00	150,000.00	[REDACTED]	R
<input type="checkbox"/>	Loan Originated	07/31/2023	[REDACTED]	[REDACTED]	Post Closing	08/04/2023	\$150,000.00	74,605.65	[REDACTED]	R
<input type="checkbox"/>	Application denied	07/19/2022	[REDACTED]	[REDACTED]	Suspended		\$150,000.00	150,000.00	[REDACTED]	N
<input type="checkbox"/>	Loan Originated	07/19/2023	[REDACTED]	[REDACTED]	Post Closing	07/20/2023	\$100,000.00	13,605.65	[REDACTED]	M
<input type="checkbox"/>	Loan Originated	07/11/2023	[REDACTED]	[REDACTED]	Post Closing	07/12/2023	\$100,000.00	60,000.00	[REDACTED]	C
<input type="checkbox"/>	Loan Originated	08/31/2023	[REDACTED]	[REDACTED]	Post Closing	09/01/2023	\$51,000.00	51,000.00	[REDACTED]	C
<input type="checkbox"/>	Application denied	08/03/2023	[REDACTED]	[REDACTED]	Initial UW Review		\$60,000.00	60,000.00	[REDACTED]	S

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# QUORUM PARTNER PORTAL

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

CONTACT US Nicholas [dropdown]

TPO CONTACTS WELCOME PIPELINE ADD NEW LOAN REPORTING HOME RESOURCES DOCUMENTS

Pipeline [Loan #] Search

Channel Wholesale View All Loans **Loan Status** Current [3] Archive [X] [Print]

<input type="checkbox"/>	CURRENT LOAN STATUS	APPLICATION DATE	LOAN #	BORROWER NAME	NEXT EXPECTED MILESTONE	UNDERWRITING APPROVAL DATE	LOAN AMT	HELOC INITIAL ADVANCE	SUBJECT PROPERTY ADDRESS	S
<input checked="" type="checkbox"/>	Application approved but not accepted	09/15/2023	[REDACTED]	[REDACTED]	Initial UW Review	09/20/2023	\$150,000.00	150,000.00	[REDACTED]	M
<input type="checkbox"/>	Application approved but not accepted	08/25/2023	[REDACTED]	[REDACTED]	Processing	08/31/2023	\$250,000.00	250,000.00	[REDACTED]	C
<input type="checkbox"/>	Application denied	07/12/2023	[REDACTED]	[REDACTED]	Initial UW Review		\$37,893.00	37,893.00	[REDACTED]	M
<input type="checkbox"/>	Application denied	08/07/2023	[REDACTED]	[REDACTED]	Suspended	08/15/2023	\$150,000.00	150,000.00	[REDACTED]	R
<input type="checkbox"/>	Loan Originated	07/31/2023	[REDACTED]	[REDACTED]	Post Closing	08/04/2023	\$150,000.00	74,605.65	[REDACTED]	R
<input type="checkbox"/>	Application denied	07/19/2022	[REDACTED]	[REDACTED]	Suspended		\$150,000.00	150,000.00	[REDACTED]	N
<input type="checkbox"/>	Loan Originated	07/19/2023	[REDACTED]	[REDACTED]	Post Closing	07/20/2023	\$100,000.00	13,605.65	[REDACTED]	M
<input type="checkbox"/>	Loan Originated	07/11/2023	[REDACTED]	[REDACTED]	Post Closing	07/12/2023	\$100,000.00	60,000.00	[REDACTED]	C
<input type="checkbox"/>	Loan Originated	08/31/2023	[REDACTED]	[REDACTED]	Post Closing	09/01/2023	\$51,000.00	51,000.00	[REDACTED]	C
<input type="checkbox"/>	Application denied	08/03/2023	[REDACTED]	[REDACTED]	Initial UW Review		\$60,000.00	60,000.00	[REDACTED]	S

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# QUORUM PARTNER PORTAL

## UNABLE TO LOGIN TO PARTNER PORTAL FORGOT PASSWORD:

1. Visit [partners.quorumfcu.org](https://partners.quorumfcu.org) & select “Portal Log In.”

The screenshot shows the top navigation bar of the Quorum Federal Credit Union website. The Quorum logo is on the left. The navigation menu includes: PRODUCTS, RESOURCES, LOAN SERVICING, PARTNER PORTAL, and PORTAL LOG IN. The PORTAL LOG IN button is highlighted with a blue border and a green circle containing the number 1. Below the navigation bar is a large banner image of a woman working on a laptop. The banner text reads: "More visibility, flexibility and convenience—in one place." followed by "Discover how you can close more loans faster." and a green button labeled "LEARN MORE".



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

The screenshot shows the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." and navigation links for "HOME" and "RESOURCES". At the top right are links for "CONTACT US" and "Login". The main content area features three informational boxes: "Spring Special! Limited Time Offer!" with a link to a Rate Matrix and Program Guidelines, "Having Trouble Logging In?" with instructions for users who haven't logged in for 30 days, and "Current Turn Times" for HELOC, listing submission, underwriting, and CTC times. A "LOGIN" modal window is overlaid on the page, containing a "User Name" input field, an unchecked "Internal User" checkbox, and a "Continue" button. A green circle with the number "2" is positioned over the "Internal User" checkbox, indicating the step described in the text above.



## 3. Click “Forgot Password.”

The screenshot shows the Quorum Partner Portal interface. At the top left is the Quorum logo with the tagline "BANKING THAT'S GOOD. FOR YOU." and navigation links for "HOME" and "RESOURCES". At the top right are links for "CONTACT US" and "Login". A central modal window titled "LOGIN" is open, containing a text input field with the email "lisa.jacobs@quorumfcu.org", a password input field with an eye icon, a "Remember Me" checkbox, and a blue "Login" button. A green circle with the number "3" is positioned above the modal. Below the modal, a "Forgot Password?" link is highlighted with a blue box. The background features a sidebar with sections: "Spring Special! Limited Time Offer!" with a link to "Rate Matrix and Program Guidelines", "Having Trouble Logging In?" with instructions for users who haven't logged in for 30 days, and "Current Turn Times" for HELOC, listing submission, underwriting, and CTC timelines.



## 4. Type in your email address and click “Submit.”

The screenshot displays the Quorum Partner Portal interface. On the left, there are two informational sections: 'Having Trouble Logging In?' and 'Current Turn Times'. The 'Having Trouble Logging In?' section includes a link for users who haven't logged in for over 30 days. The 'Current Turn Times' section lists processing times for HELOC: Submission (1 business day), Initial Underwriting (1 business day), and CTC (1 business day). The main content area features a 'FORGOT PASSWORD' modal form. The form has a title bar with a back arrow, the text 'FORGOT PASSWORD', and a close 'X' icon. Below the title bar, it says 'PLEASE ENTER THE LOGIN EMAIL ADDRESS FOR THE ACCOUNT.' and 'LOGIN EMAIL ADDRESS'. There is a text input field with the placeholder 'Login E-mail Address or Username' and a 'SUBMIT' button. A green circle with the number '4' is overlaid on the 'SUBMIT' button. The footer contains links for 'Partner Page' and 'Resource Guide', the address '2500 Westchester Avenue, Purchase, NY 10577', and a 'Privacy Policy Statement' link. It also includes the text 'TPO Connect\_PROD\_20230318' and '© 2022 Quorum Federal Credit Union. Serving members since 1934.'



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

The screenshot displays the Quorum Partner Portal interface. A modal dialog titled "FORGOT PASSWORD" is centered on the screen, highlighted with a blue border and a green circle containing the number "5". The dialog contains the following text:

< FORGOT PASSWORD ×

If it is a valid account, an email has been sent to your contact email address.

**Next Steps:**

1. Check your inbox for a password reset email from us . If you don't see this email, it may have been mistakenly placed in your spam mail folder.
2. Follow the instructions in the email to reset your password.

The background of the screenshot shows a sidebar with two sections:

- Having Trouble Logging In?**  
Having troubles logging in? If it's been more than 30 days since your last log in, please click here and select New User Sign Up.
- Current Turn Times**  
HELOC
  - Submission: 1 business day
  - Initial Underwriting (once submitted to Underwriting): 1 business day
  - CTC: 1 business day

The footer of the page contains the following information:

Partner Page | 2500 Westchester Avenue, Purchase, NY 10577 | Privacy Policy Statement  
Resource Guide

TPO Connect\_PROD\_20230318 | © 2022 Quorum Federal Credit Union. Serving members since 1934.



# QUORUM PARTNER PORTAL

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

The screenshot shows an email client interface with a blue header bar. The title bar reads "Reset Password - Message (HTML)". The ribbon includes "File", "Message", and "Help". The "Message" ribbon is active, showing options like "Delete", "Archive", "Reply", "Reply All", "Forward", "Share to Teams", "Quick Steps", "Move", "Tags", "Editing", "Immersive", "Translate", "Zoom", "Reply with Scheduling Poll", "Send to OneNote", "Viva Insights", and "Report Phishing".

The email content is titled "Reset Password" and is from "Quorum Federal Credit Union <mortgagesales@quorumfcu.org>" to "Lisa Silipino". The date is "Thu 5/11/2023 11:09 AM".

A yellow caution box states: "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."

A red box with the number "6" highlights the link "Click here to access your account" in the text: "Click here to access your account" and complete the steps to reset your password.

Below the link, it says: "If you experience problems opening the link, copy and paste the URL below into your Web browser. URL: <https://5443858935.encompasstoconnect.com/#/content/resetpassword?rcode=RVMCARAAnop2pcoCd/JJB1cz2O0eTW1k6sHYQ65zFEpkuP8GmWIFpa4rXh7YmJW3f4ziGAP>

At the bottom, it says: "\*\*\*\*DO NOT REPLY TO THIS E-MAIL. THIS MAILBOX IS NEITHER MONITORED NOR ANSWERED\*\*\*\*"



## 7. Type in your email, create a new password and click “Reset Password.”

The screenshot displays the Quorum Partner Portal interface. On the left side, there are three informational boxes:

- Spring Special! Limited Time Offer!**
  - Visit <https://partners.quorumfcu.org/> to view *Rate Matrix and Program Guidelines*
- Having Trouble Logging In?**

Having troubles logging in? If it's been more than 30 days since your last log in, please click [here](#) and select New User Sign Up.
- Current Turn Times**

HELOC

  - Submission: 1 business day
  - Initial Underwriting (once submitted to Underwriting): 1 business day
  - CTC: 1 business day

The main content area features a large greyed-out image at the top. Below it, the **Reset Password** form is highlighted with a blue border and a green circle containing the number 7. The form includes the following fields and a button:

- Email
- \* New Password
- \* Re-enter New Password
-



## 8. Click “Continue.”

The screenshot displays the Quorum Partner Portal interface. On the left, there are three informational sections: "Spring Special! Limited Time Offer!" with a link to <https://partners.quorumfcu.org/> for Rate Matrix and Program Guidelines; "Having Trouble Logging In?" with a link for users who haven't logged in for 30 days; and "Current Turn Times" for HELOC, listing submission (1 business day), initial underwriting (1 business day), and CTC (1 business day). The main content area is titled "Reset Password" and features a form with fields for "New Password" and "Re-enter New Password", and a "Reset Password" button. A central modal dialog box, highlighted with a green circle containing the number 8, shows a green checkmark icon and the text "Password was reset successfully." with a "Continue" button.



9. Click “Click here to Log in” to access your account.

**Quorum**  
BANKING THAT'S GOOD. FOR YOU.

CONTACT US Login

HOME ▾ RESOURCES ▾

**Spring Special!  
Limited Time Offer!**

- Visit <https://partners.quorumfcu.org/> to view *Rate Matrix and Program Guidelines*

**Having Trouble Logging In?**

Having troubles logging in? If it's been more than 30 days since your last log in, please [click here](#) and select New User Sign Up.

**Login**

Click here to Log In

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