

1. Login to TPO portal. Click here.
2. Click Add New Loan on the menu bar
3. Select the processor and LO on the file and hit “next”.

Register Wholesale Loan

Choose Contacts

LOAN OFFICER

Organization: test theLender

User Name: Select

LOAN PROCESSOR

Organization: test theLender

User Name: Select

Cancel Next

4. To load your 3.2 file you can either drag and drop your 3.2 file or you can use the “click to Browse” feature seen below. When done loading click “next” button.

Register Wholesale Loan

Initial Loan Estimate Issued By

Broker

Lender

Import Loan Data From FNM 3.2

Manual

Drop Here to Upload or Click to Browse

Back Cancel Next

5. Make sure there is no subject property address in your 3.2 file. This will prevent you from being able to register the file. You can manually delete the address before going to the next step.
6. In the 1003 screen you need to switch the “Loan Type” to “Early Review” as seen below.

I. Types of Mortgage and Terms of Loan

Base Loan Amount: \$350,000.00

Lien Position: First

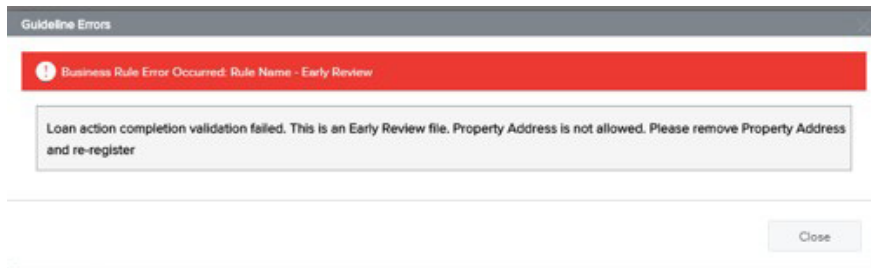
Sub Financing: Yes No

Loan Type: Early Review

7. Next click “register” at the top right of the screen as seen here.



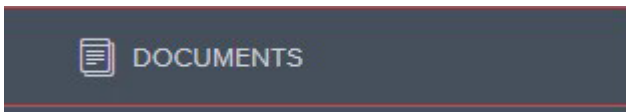
8. If there is an address in the file you will get the following error as seen below.



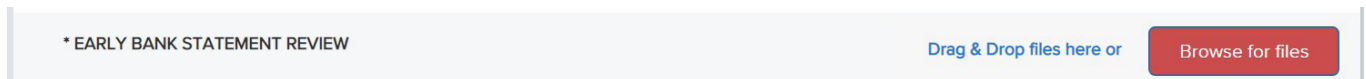
9. Delete the address and then continue to register the file by clicking “register” button.

10. Next you need to upload your bank statements to the file.

11. Click “document” tab seen below.



12. Next upload your bank statement to the folder labeled “Early Review Submission” by using the “drag and drop” or “browse for files” feature as seen below



13. Once your document is finished loading you can exit the file.

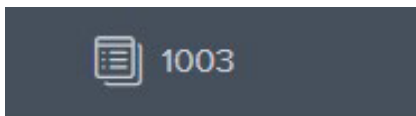
14. Our Early Review team will be getting back you within 24 hours

STOP HERE

Once you have received your Early review Income results, please proceed to the next steps below

Early Review file that is now READY TO SUBMIT:

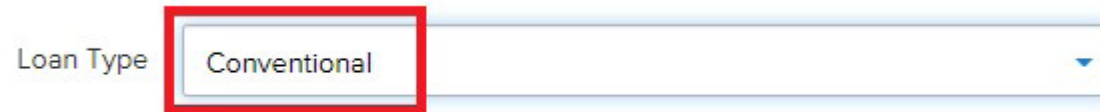
- 1. Login to TPO portal. Click here to access.
- 2. Click on the loan you are ready to submit.
- 3. Next Click on the 1003 Tab.



- 4. Go to the sections labeled “Loan Type” and change it from “Early Review”



to “Conventional” and click save.



- 5. When this is completed the “import Additional Data” button will become available.



- 6. Click “import Additional Data”
- 7. Next you need to answer the 2 questions before uploading the new 3.2 file.

Import Additional Data

Import Options

Which fields would you like to import?

- Import all fields
- Import only non-blank fields

Would you like to retain existing lists? (residences, liabilities, etc)

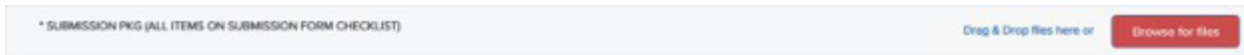
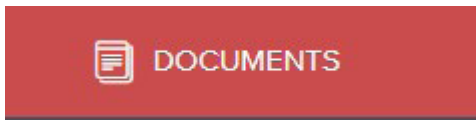
- Delete existing lists before importing
- Add to existing lists

9. Once you have answered the 2 questions upload the new 3.2 file by either “drag and drop” or “browse” feature.

10. Next click the “import” Button.



11. Once the importing is complete, click on the “documents” tab seen below and upload your submission package to the folder labeled “Submission PKG (ALL ITEMS ON SUBMISSION FORM CHECKLIST).”



14. Once the documents are uploaded go back to the loan actions section and click the ‘Submit loan’ button see below.

