

Bayshore Mortgage Funding

Tpo Connect Quick Guide

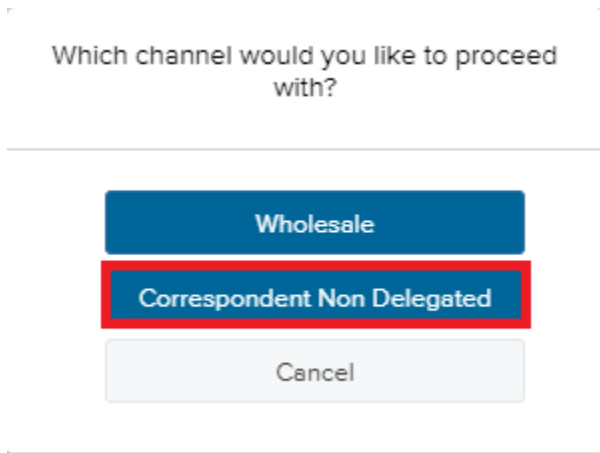
To Register A Loan:

Log in to TPO Connect : <https://1276509216.encompasstpoconnect.com/>

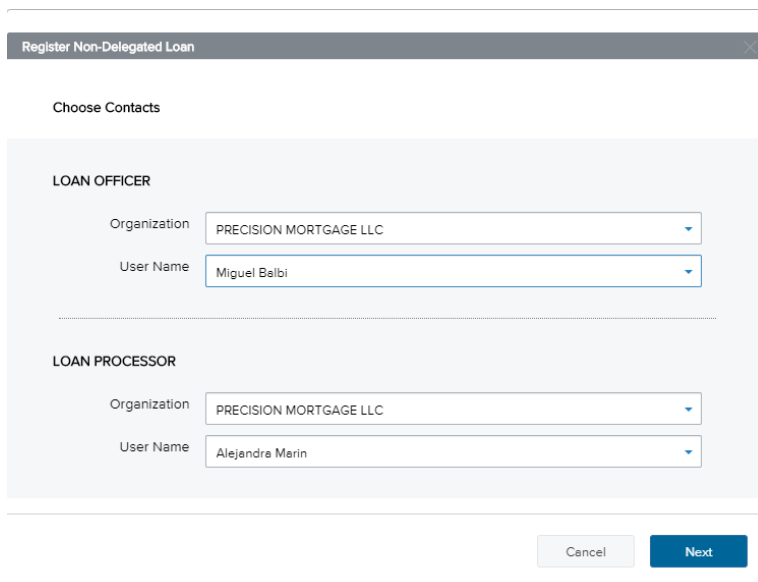
Click Add new Loan



Select "Correspondent Non-Delegated"



Select the User's for the File

A form titled 'Register Non-Delegated Loan' with a grey header and a close button. The form is divided into two sections: 'LOAN OFFICER' and 'LOAN PROCESSOR'. Each section has two dropdown menus for 'Organization' and 'User Name'. The 'LOAN OFFICER' section has 'PRECISION MORTGAGE LLC' and 'Miguel Balbi' selected. The 'LOAN PROCESSOR' section has 'PRECISION MORTGAGE LLC' and 'Alejandra Marin' selected. At the bottom right, there are 'Cancel' and 'Next' buttons.

Select Import 3.2 or Manual

If importing attach 3.2

Register Non-Delegated Loan

Import Loan Data From FNM 3.2

Manual

Drop Here to Upload or [Click to Browse](#)

Back Cancel Next

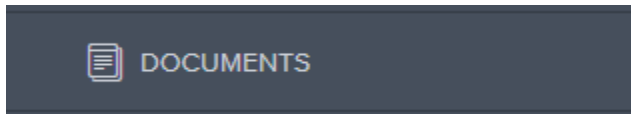
Click Register

Register Next

How to Upload Doc's

- Initial (Before submission)

Click Documents



Upload All Initial Docs under unassigned (A Bayshore Employee will sort the doc's)

All Borrowers

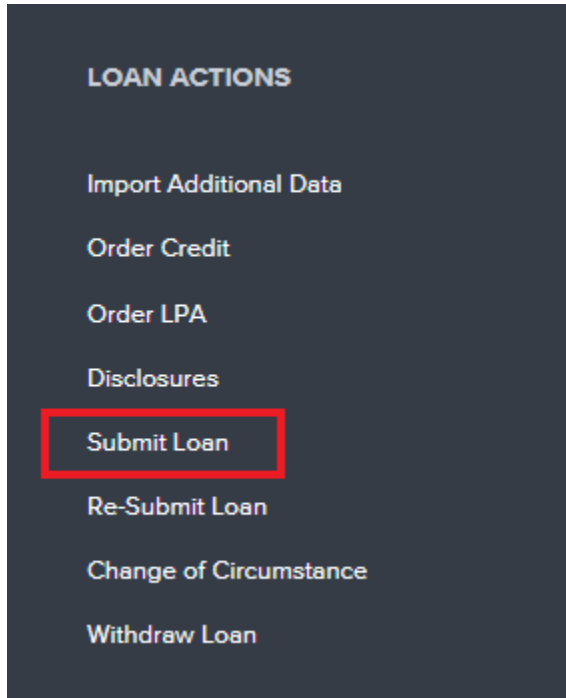
[UNASSIGNED] Drag & Drop files here or [Browse for files](#)

Upload Completed Bayshore Mortgage Funding Non-Delegated Checklist

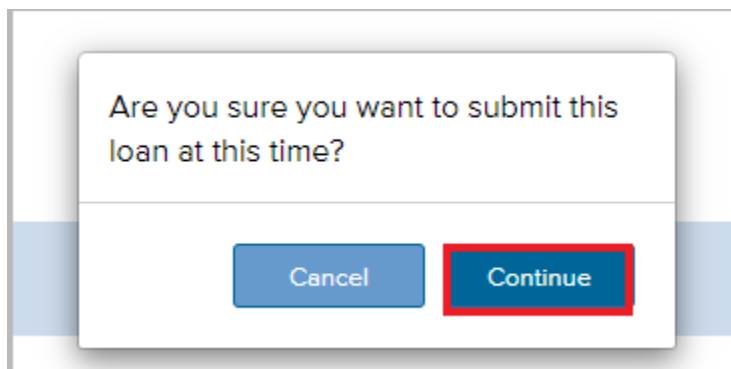
- Please confirm all items on checklist uploaded

How to submit to Underwriting

Click Submit Loan



The next screen will have a "Pop Up" to Submit loan



Successful submission will populate here

Submit Loan

Submission Overview		
Application Date 08/22/2020	Submission Status Submitted	Submission Date 08/22/2020

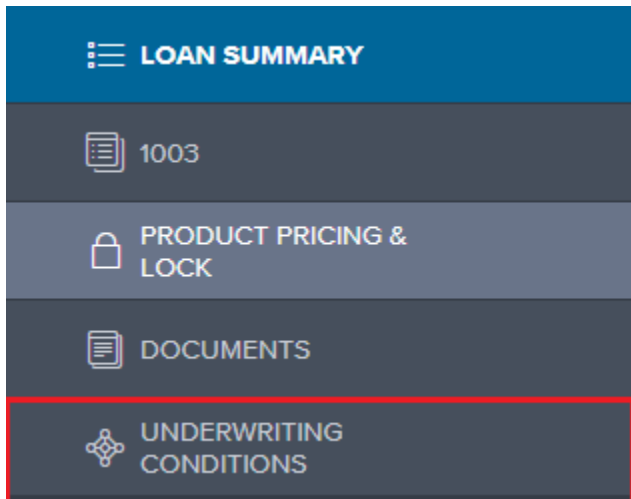
The file will remain in started till the submission is confirmed by Bayshore.

How to Clear Suspense

Suspended Files will Appear in the pipeline with an alert

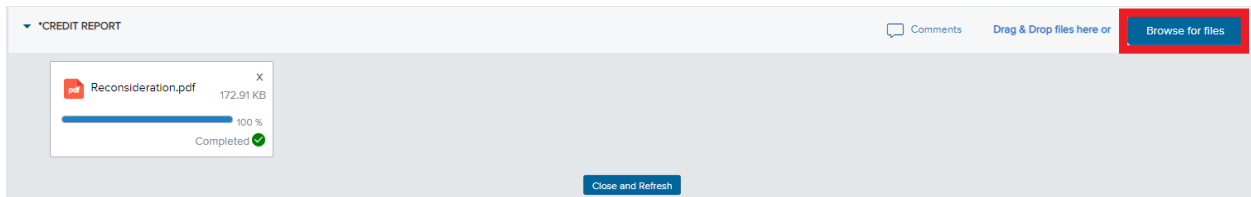


All suspended files will have conditions assigned to it starting with the word Suspended.



Category	Condition	Prior to	Date Added	Date Revised
▼	Suspended		08/22/20	
	Suspended - No Credit in file			

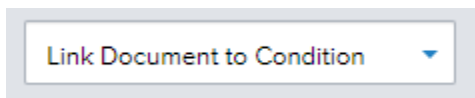
To clear suspense upload documentation to file and attach to condition



To attach to a condition first upload the Document to the proper Doc bucket.

Navigate to the condition

Use the Link Document to condition drop down to select the Doc bucket you upload the document to

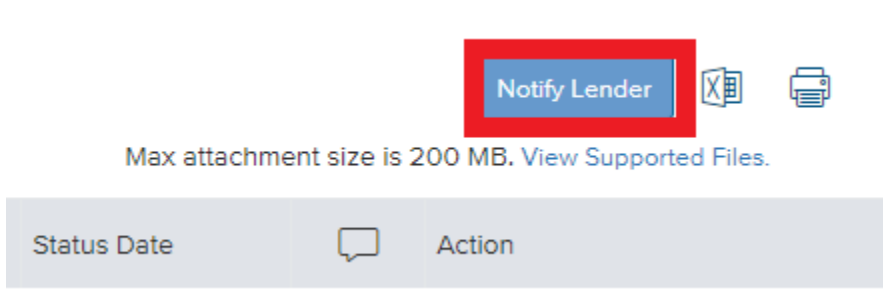


Click Ready for Review on each Condition

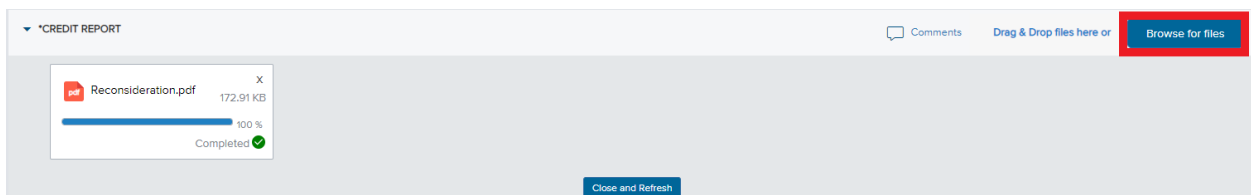
Status	Status Date		Action
Added	08/22/20	0	Ready for Review

Click Notify Lender for Review

(All suspense Items are required to be fulfilled to request review)



How to submit for CTC



To attach to a condition first upload the Document to the proper Doc bucket.

Navigate to the condition

Category	Condition	Prior to	Date Added	Date Revised	Age
▼ Property	Appraisal - Written Valuations Tracking	Approval	08/14/20		10
Provide Evidence that all valuations were delivered to Borrower at least 3 days prior to closing or provide a fully ex					
Link Document to Condition ▼					
▼	Appraisal logging and EAD upload	Approval	08/14/20		10
Logging must be completed for the appraisal AND each time a revision is made to the appraisal.					
Link Document to Condition ▼					

Use the Link Document to condition drop down to select the Doc bucket you upload the document to



Link Document to Condition ▼

Click Ready for Review on each Condition


Status	Status Date	0	Action
Added	08/22/20	0	Ready for Review

Click Notify Lender for Review

Please upload and attach all conditions before Clicking notify Lender

Notify Lender  

Max attachment size is 200 MB. [View Supported Files.](#)

Status Date  Action

