



## WELCOME!

Thank you for choosing Quorum as your wholesale lending partner! We are excited to be partnered with you. Our commitment is to offer competitive products, along with a seamless loan process from submission to funding. Our Partner Portal is powered by TPO Connect, an integrated ICE Mortgage Technology system.

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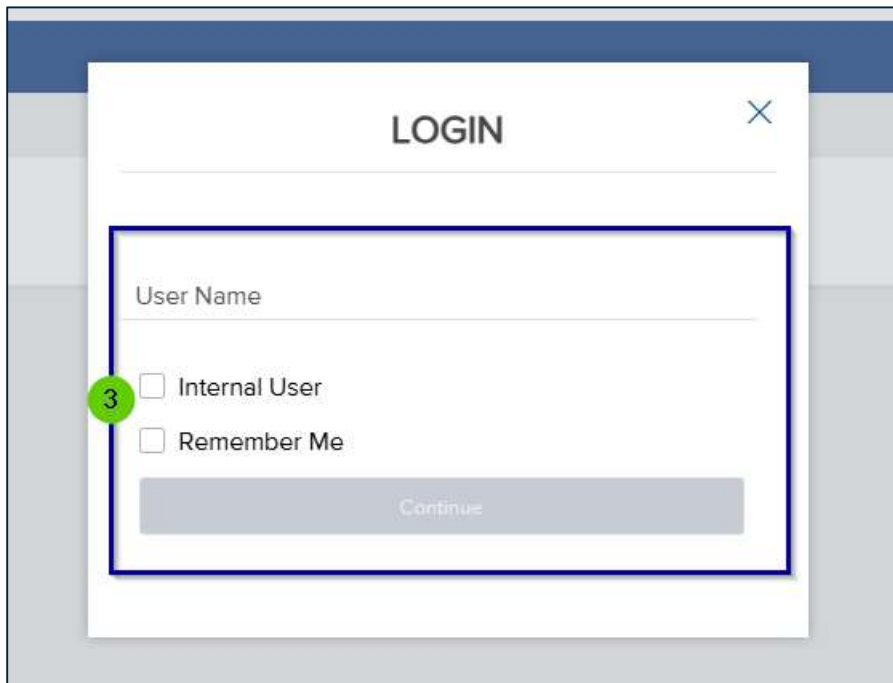
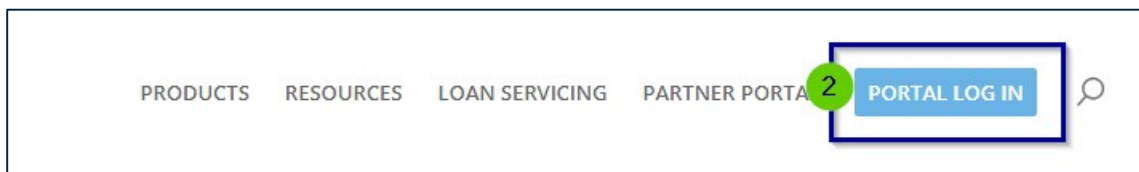
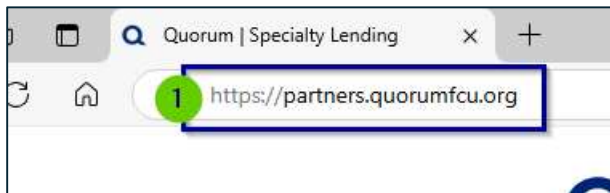
# QUORUM PARTNER PORTAL

## ACCESSING TPO

1. Access our wholesale website: <https://partners.quorumfcu.org/>

### Quick Tip!

- Use Google Chrome or Microsoft Edge internet browsers
  - Do **not** check the “Internal User” box
2. Click **Portal Log In** located at the top right corner
  3. Within the **Login** box, enter your credentials. If you forgot your password, select **Forgot Password?** (after entering User Name and clicking Continue, Forgot Password option will appear in the upper left corner of the Login box).





# QUORUM PARTNER PORTAL

## SUBMITTING A LOAN

### Adding/Registering a New Loan

1. Click **Add New Loan**
2. Select your **Contacts** by selecting the pencil icon to the right. Both Loan Officer and Loan Processor required. Click **Next** to proceed.
3. Drop Files or Browse your local drive for your Fannie Mae **3.4 File**. Click **Go to Register Loan Form** to import the data.

*\*Do not select Manual Data Format, contact your Account Executive if you are having trouble uploading 3.4 File.*

#### **Quick Tip!**

- If your file name includes numbers, e.g., “Test123.xml” you will receive an error. To correct this, re-name the file to remove the numbers, e.g., “Test.xml”.
  - File name must end in exactly “.xml”. You will receive an error otherwise.
4. **Review** the Submission Verification page. Review loan information pre-populated from your Fannie Mae 3.4 file, **update** as needed, and **fill in** empty fields.
  5. Click **Step 1 – Start Submission**.

#### **Quick Tip!**

- If you have multiple Borrower Pairs and the Occupancy selection is not saving, complete the following: Once completing all required fields, change the Borrower Pair drop down to the second borrower pair, click Step 1 – Start Submission, fill in any missing fields in the pop-up box, click Complete/Save. Then change the Borrower Pair drop down back to the first borrower pair, click Step 1 – Submission again, fill in any missing fields in the pop-up box, click Complete/Save, and click Step 1 – Start Submission a final time.

### Uploading Documents

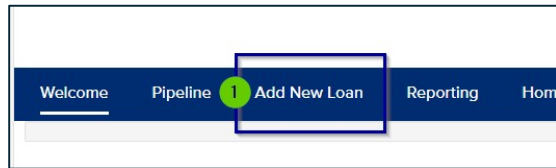
6. On the left menu, select **Documents**. Upload the signed and completed **Certification and Acknowledgement Form (including eSign certificate, if applicable), 1003, and any other available documents** to the **[UNASSIGNED]** folder.

### Submitting the Loan

7. On the left menu, click **Step 2 – Submit Loan**. In the upper right of the screen, click **Confirm**.



# QUORUM PARTNER PORTAL



Progress: 1. Select Channel (checked) → 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 2 Next

Progress: 1. Select Channel (checked) → 2. Select Contacts (checked) → 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 3 Go to Register Loan Form



# QUORUM PARTNER PORTAL

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Submission Verification

Select Borrower Pair  
John Homeowner

Step 1 - Start Submission

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

Loan Type \*

Select an Option

Required Field

Product Selection \*

Select an Option

Required Field

Loan Amount \*

125000

Loan Purpose \*

Cash-Out Refi

Subject Property Appraised Value \*

500000

Subject Property Type Fannie Mae \*

Select an Option

Required Field

Subject Property Occupancy Status \*

Primary

Lien Position \*

Subordinate

HELOC Initial Advance

HELOC Purpose

Select an Option

Subject Property Estimated Value \*

500000

Subject Property Type \*

Select an Option

Required Field

Estimated Closing Date \*

Is this Borrower's current residential address the same as the one on file? \*

Submission Verification

Select Borrower Pair  
John Homeowner

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Step 1 - Start Submission

Loan Summary

URLA

Submission Verification

Documents

Conditions

LOAN ACTIONS

Step 2 - Submit Loan

Max attachment size is 200 MB. View Supported Files.

Expand All Collapse All Add Document Print Fax Cover Sheet

All Borrowers

[UNASSIGNED]

Drag & Drop files here or 6 Browse for files

Loan Summary

URLA

Submission Verification

Documents

Conditions

LOAN ACTIONS

Step 2 - Submit Loan

Step 2 - Submit Loan

7

Confirm

Overview

Application Date  
12/14/2023

Submission Status  
-

Initial Step 2 - Submit Loan Date  
-

Last Step 2 - Submit Loan Date  
-

Borrower

First Name  
John

Middle Name  
-

Suffix  
-

Last Name  
Homeowner

Cell Phone Number  
555-123-4567

Email Address  
Test@quorumfcu.org

SSN  
###-##-5000

Co-Borrower

First Name  
-

Middle Name  
-

Suffix  
-

Last Name  
-

Cell Phone Number  
-

Email Address  
-

SSN  
###-##-####

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V11172025



# QUORUM PARTNER PORTAL

## TPO CONNECT VISIBILITY

### Accessing the Pipeline

1. **View Pipeline** by clicking **Pipeline** in the top menu. You may search your pipeline using several methods including changing filters at the top, sorting/searching by a specific column, searching a specific loan number, or searching a specific key word.
2. **Archive (hide) loans** by selecting the checkbox next to the desired loan and clicking Archive.

Quorum Partner Portal Pipeline view. The interface shows a top navigation bar with 'Pipeline' highlighted. Below the navigation bar, there's a search bar for 'Loan #' and a 'Search' button. The main table displays loan details. The 'Borrower Name' column is highlighted, and the 'Active Loan' row is selected.

CURRENT LOAN STATUS	APPLICATION DATE	LOAN #	BORROWER NAME	UNDERWRITING APPROVAL DATE	LOAN AMT	HELOC INITIAL ADVANCE	SUBJECT PROPERTY ADDRESS	SUBJECT PROPERTY CITY	SUBJECT PROPERTY STATE	LOAN PROGRAM	HELOC PURPOSE
Active Loan	05/09/2025	250548144	Homeowner, John		\$125,000.00	50,000.00	175 13th Street	Washington	DC	HELOC Express	Stand Alone

Quorum Partner Portal Pipeline view. The 'Archive' button is highlighted with a red box and a red '2'. The 'Active Loan' row is selected.

CURRENT LOAN STATUS	APPLICATION DATE	LOAN #	BORROWER NAME	UNDERWRITING APPROVAL DATE	LOAN AMT	HELOC INITIAL ADVANCE	SUBJECT PROPERTY ADDRESS	SUBJECT PROPERTY CITY	SUBJECT PROPERTY STATE	LOAN PROGRAM	HELOC PURPOSE
Active Loan	05/09/2025	250548144	Homeowner, John		\$125,000.00	50,000.00	175 13th Street	Washington	DC	HELOC Express	Stand Alone

### View/Download Documents

1. View and download **Approval Letter**, **Disclosures**, and other documents by selecting **Documents** from left menu, clicking on the desired document, and clicking the document link (to view) or clicking the down arrow to the right (to download and save a copy locally).

Quorum Partner Portal Documents view. The 'Documents' menu item is highlighted with a red box and a red '1'. The 'AVM.pdf' document is highlighted with a red box. The 'Download' button is highlighted with a red box.

Max attachment size is 200 MB. View Supported Files. Expand All Collapse All Add Document Print Fax Cover Sheet

All Borrowers

[UNASSIGNED]

Drag & Drop files here or Browse for files

PROPERTY - VALUATION

AVM.pdf 2.33 MB 10/28/2025 1:28 PM Ocorius Automation

John Homeowner

CERTIFICATION AND ACKNOWLEDGEMENT FORM



# QUORUM PARTNER PORTAL

## Managing Conditions

1. **View Conditions** and status of each by selecting **Conditions** from the left menu. Here you may sort the Conditions as desired by changing the filters at the top and sorting/searching by a specific column. Some helpful ways to sort include, by Status (to view which conditions are Cleared or outstanding) and by Type (to view conditions that are Broker Responsibility)

### Quick Tip!

- **Fulfilled:** Status indicates documentation was received and is pending review by Underwriting.
  - **Requested:** Status indicates we have ordered the necessary service and are pending receipt.
  - **Rejected:** Status indicates documentation was received and reviewed by Underwriting but does not satisfy the condition.
2. **Add Comments** to Conditions by clicking on the speech bubble icon next to the desired condition. The icon will show a number if there are any prior comments, click it to view. Once done adding a comment, click the **Notify Lender** button in the upper left of the screen to notify us.
  3. **Upload documents** for outstanding Conditions by selecting **Documents** from the left menu and uploading to the **[UNASSIGNED]** folder.

PUBLISHED	STAT...	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION	DISPOSITION
05/09/2025	Added	Property	Approval	Broker Responsibility	Property - Homeowners Insuranc...	Property - Homeowners Insurance Policy...	
05/09/2025	Fulfilled	Income	Approval	Broker Responsibility	Income - Paystub Most Recent (B...	Income - Paystub Most Recent (Borrower)...	
05/09/2025	Rejected	Income	Approval	Broker Responsibility	Income - W2 One Year (Borrower)	Income - W2 One Year (Borrower): Provid...	
05/09/2025	Added	Property	Approval	Broker Responsibility	Property - Retained Properties Ve...	Property - Retained Properties Verification...	
05/09/2025	Added	Miscellaneous	Approval	Broker Responsibility	Membership - Application Form	Membership - Application Form: Provide ...	
05/09/2025	Added	Property	Docs	Broker Responsibility	(PTD) Title - Vesting Confirmation	(PTD) Title - Vesting Confirmation: Provid...	
05/09/2025	Cleared	Miscellaneous	Approval	Broker Responsibility	Membership - Identification	Membership - Identification: Provide valid...	
05/09/2025	Added	Credit	Approval	Broker Responsibility	Loan Application (1003)	Loan Application (1003): Provide copy of L...	
05/09/2025	Added	Property	Approval	Broker Responsibility	Property - Flood Insurance Policy	Property - Flood Insurance Policy: Provid...	
05/09/2025	Added	Property	Approval	Quorum Responsibility	Valuation - AVM	Valuation - AVM: Quorum obtain satisfact...	
05/09/2025	Added	Property	Approval	Quorum Responsibility	Title - Property Report	Title - Property Report: Quorum obtain an...	
05/09/2025	Added	Miscellaneous	Approval	Quorum Responsibility	Rate Validation (Recent Index Cha...	Rate Validation (Recent Index Change): Q...	
05/09/2025	Added	Property	Approval	Quorum Responsibility	Property - Flood Certification	Property - Flood Certification: Quorum ob...	
05/09/2025	Added	Miscellaneous	Approval	Quorum Responsibility	Approved Terms	Approved Terms: The terms are as follow...	



# QUORUM PARTNER PORTAL

Activities Workflow

Loan Summary

URLA

Documents

Conditions

LOAN ACTIONS

Step 2 - Submit Loan

Conditions (16)

Condition Type All Conditions

PUBLISHED	STAT...	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION			DISPOSITION
05/09/2025	Added	Property	Approval	Broker Responsibility	Property - Homeowners Insuranc...	Property - Homeowners Insurance Policy...			
05/09/2025	Fulfilled	Income	Approval	Broker Responsibility	Income - Paystub Most Recent (B...	Income - Paystub Most Recent (Borrower)...			
05/09/2025	Rejected	Income	Approval	Broker Responsibility	Income - W2 One Year (Borrower)	Income - W2 One Year (Borrower) Provid...		2	
05/09/2025	Added	Property	Approval	Broker Responsibility	Property - Retained Properties Ve...	Property - Retained Properties Verificatio...			
05/09/2025	Added	Miscellaneous	Approval	Broker Responsibility	Membership - Application Form	Membership - Application Form: Provide ...			
05/09/2025	Added	Property	Docs	Broker Responsibility	(PTD) Title - Vesting Confirmation	(PTD) Title - Vesting Confirmation: Provid...			
05/09/2025	Cleared	Miscellaneous	Approval	Broker Responsibility	Membership - Identification	Membership - Identification: Provide valid...			
05/09/2025	Added	Credit	Approval	Broker Responsibility	Loan Application (1003)	Loan Application (1003): Provide copy of L...			
05/09/2025	Added	Property	Approval	Broker Responsibility	Property - Flood Insurance Policy	Property - Flood Insurance Policy: Provid...			
05/09/2025	Added	Property	Approval	Quorum Responsibility	Valuation - AVM	Valuation - AVM: Quorum obtain satisfact...			
05/09/2025	Added	Property	Approval	Quorum Responsibility	Title - Property Report	Title - Property Report: Quorum obtain an...			
05/09/2025	Added	Miscellaneous	Approval	Quorum Responsibility	Rate Validation (Recent Index Cha...	Rate Validation (Recent Index Change) Q...			
05/09/2025	Added	Property	Approval	Quorum Responsibility	Property - Flood Certification	Property - Flood Certification: Quorum ob...			
05/09/2025	Added	Miscellaneous	Approval	Quorum Responsibility	Approved Terms	Approved Terms: The terms are as follow...			

Last Notified: 5/9/2025

Notify Lender

Loan Summary

URLA

Documents

Conditions

LOAN ACTIONS

Step 2 - Submit Loan

Max attachment size is 200 MB. View Supported Files.

Export All Collapse All 1 Attachment Print Fax Cover Sheet

All Borrowers
[UNASSIGNED]

Drag & Drop files here or Browse for files

PROPERTY - VALUATION

Comments

John Homeowner

CERTIFICATION AND ACKNOWLEDGEMENT FORM

Comments

## HELPFUL LINKS AND RESOURCES

### Helpful Links:

Visit our wholesale website, <https://partners.quorumfcu.org/>, to access:

- Guidelines
- Documents and Forms
- Loan Servicing FAQs
- Turn Times
- Contact Us

### Submission Requirements:

- Executed Certification and Acknowledgement Form (including eSign Certificate, if eSigned)
- In addition to the 3.4 upload, a completed 1003/1008 (PDF versions, unsigned)
- Income documents (as per product guidelines)
- Copy of mortgage statement(s)
- Copy of Homeowners Insurance
- DU, Approval Letter, Purchase Contract (simultaneous transactions only)
- Executed Mortgage Brokerage Agreement (Tier 3 Brokers only)