



TPOC Portal Training

EXTERNAL MANAGER- COMPANY ADMINISTRATOR ROLE

Learning Objectives

By the end of this training, you should be able to:

- Understand Administrator Responsibilities
- Create New Contact/User Accounts
 - Understand Personas
 - Understand Levels of Access
 - Understand Multi-Factor Authentication Requirements
 - Understand Password Requirements
 - Be Able to Troubleshoot Common Issues
- Manage/Update Company Account Information

Helpful Contacts

General Questions

SFAsk@thda.org

Lock Questions

lockdesk@thda.org

Rhonda Ronnow CMB, CMCP, CRU

Director of Single Family Loan Operations

rronnow@thda.org

Jennifer Green CMB, AMP

Assistant Director of Single Family Loan Operations

jgreen@thda.org

Connie Brewington

Underwriting Manager

cbrewington@thda.org

Chuck Pickering, Jr

Funding Manager

cpickering@thda.org

Yvonne Hall

Housing Education & Resource Manager

yhall@thda.org

Russ Catron

SF Program Development Coordinator

rcatron@thda.org

Administrator Role and Responsibilities

User & Account Management

- You are responsible for creating, updating, and maintaining all contact/user accounts within your organization.
- Please ensure all account details remain accurate and up to date at all times.

External Manager Limit

- A maximum of three (3) External Managers may be assigned at one time.
- This will be regularly audited. If a violation is found, a User Account Violation email will be issued.
- If not corrected, locking privileges may be temporarily suspended.

Separation of Duties (Compliance Requirement)

- All personas must not be assigned to a single individual.
- To remain compliant, we must maintain proper separation of duties.
- The only exception is in special cases (e.g., a producing branch manager).
- These exceptions are reviewed case-by-case, and you may be contacted for clarification.

Administrator Role and Responsibilities

Company Information Updates

- You are responsible for updating company-wide account information, including:
 - Corporate Address
 - Phone Number
 - Other Organizational Details
 - As a best practice, please also email any updates to sfask@thda.org.

Group Email Account Restrictions

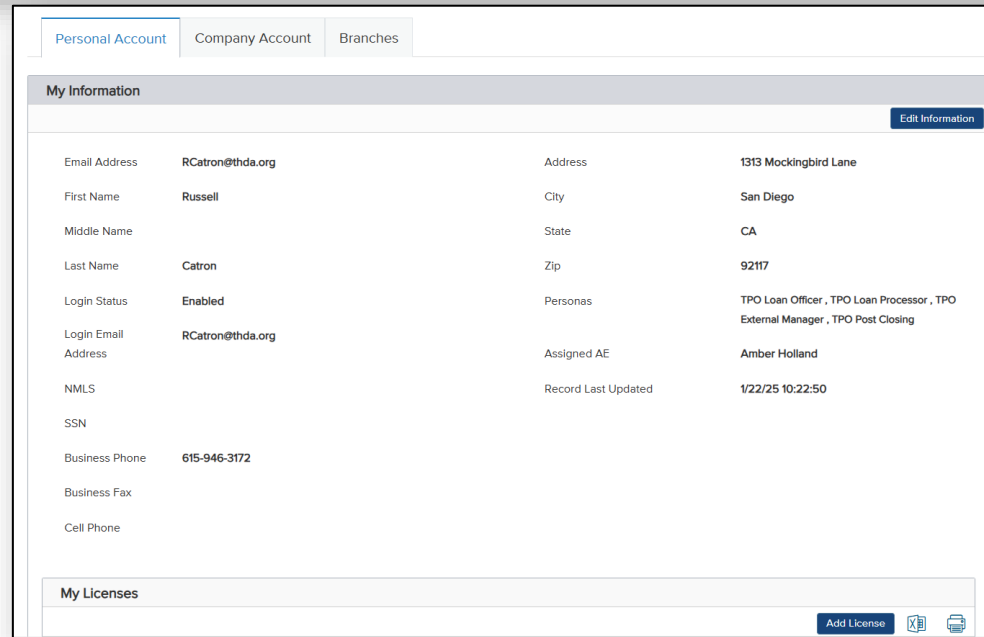
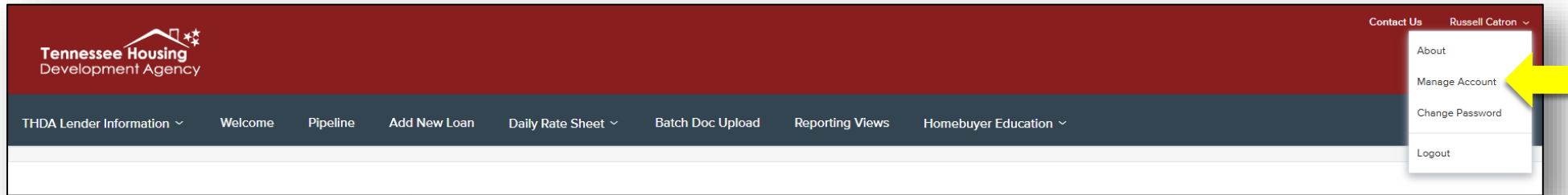
- Group distribution email accounts cannot be used to log in to the system.
- They can be used for notifications and assigned to specific loans.
- When setting up these accounts, use a fictitious phone number such as 555-555-5555 so that Multi-Factor Authentication will not work.

Auditing & Reporting

- You have the ability to export user lists.
- You can use this feature to:
 - Conduct Internal Audits
 - Verify Compliance
 - Ensure Account Accuracy and Proper Role Assignments

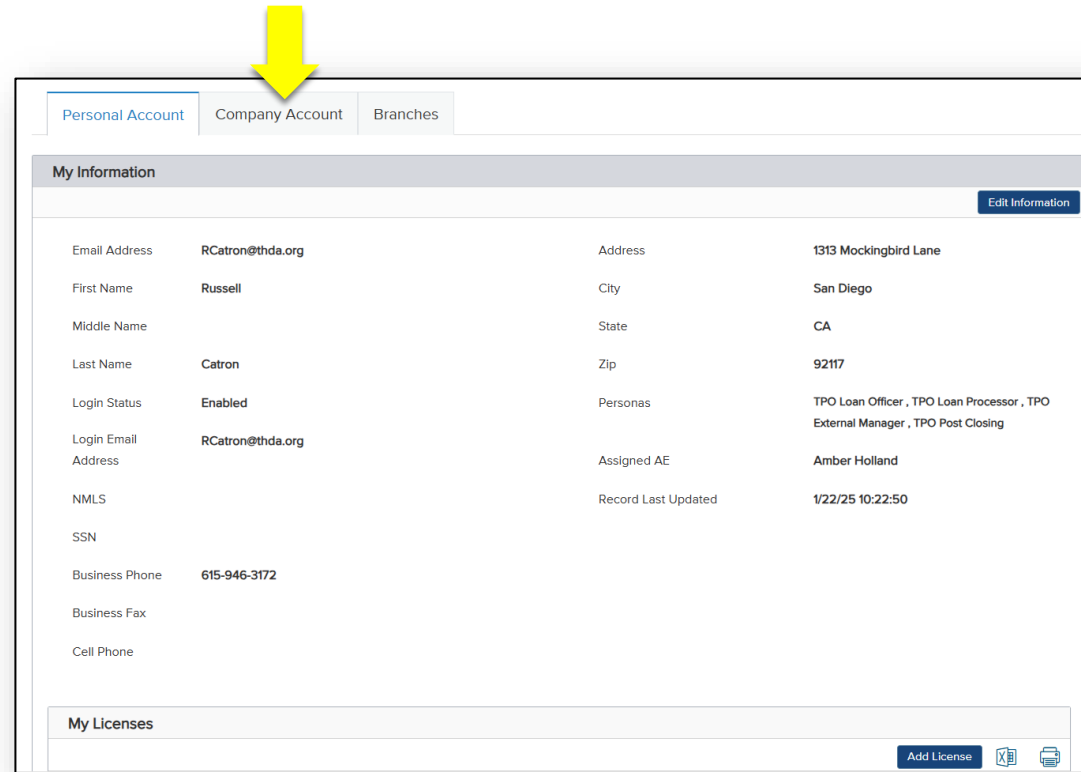
TPOC Dashboard

1. Once you log into your TPOC account, you will click in the upper right corner of the screen where your name appears.
2. Select Manage Account from the Drop-down menu.
3. Your screen will then default to the Personal Account tab as shown at the bottom of the screen.



Update Company Account Information

1. Once you click on the Company Account Tab, you will be able to update all corporate information to include address, phone number, etc. Only Administrators have this capability.
2. We do ask that you email sfask@thda.org as a courtesy with any changes.



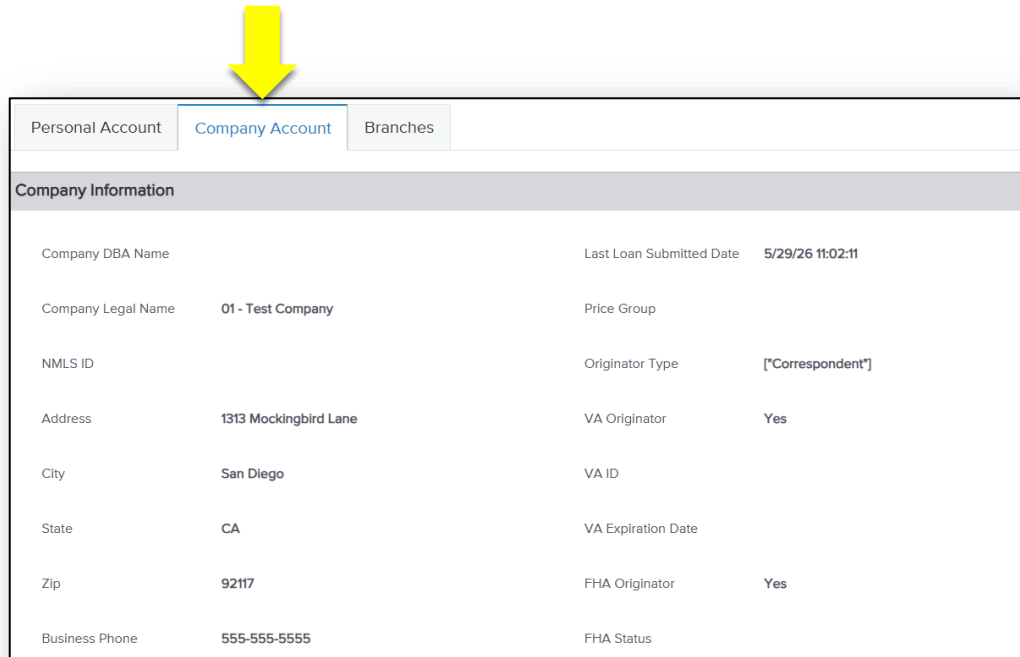
The screenshot shows a web application interface with three tabs: 'Personal Account', 'Company Account', and 'Branches'. A yellow arrow points to the 'Company Account' tab. Below the tabs is a section titled 'My Information' with an 'Edit Information' button. The information is displayed in a table format:

Email Address	RCatron@thda.org	Address	1313 Mockingbird Lane
First Name	Russell	City	San Diego
Middle Name		State	CA
Last Name	Catron	Zip	92117
Login Status	Enabled	Personas	TPO Loan Officer , TPO Loan Processor , TPO External Manager , TPO Post Closing
Login Email Address	RCatron@thda.org	Assigned AE	Amber Holland
NMLS		Record Last Updated	1/22/25 10:22:50
SSN			
Business Phone	615-946-3172		
Business Fax			
Cell Phone			

At the bottom of the page, there is a section titled 'My Licenses' with an 'Add License' button and icons for a document and a printer.

Account Information

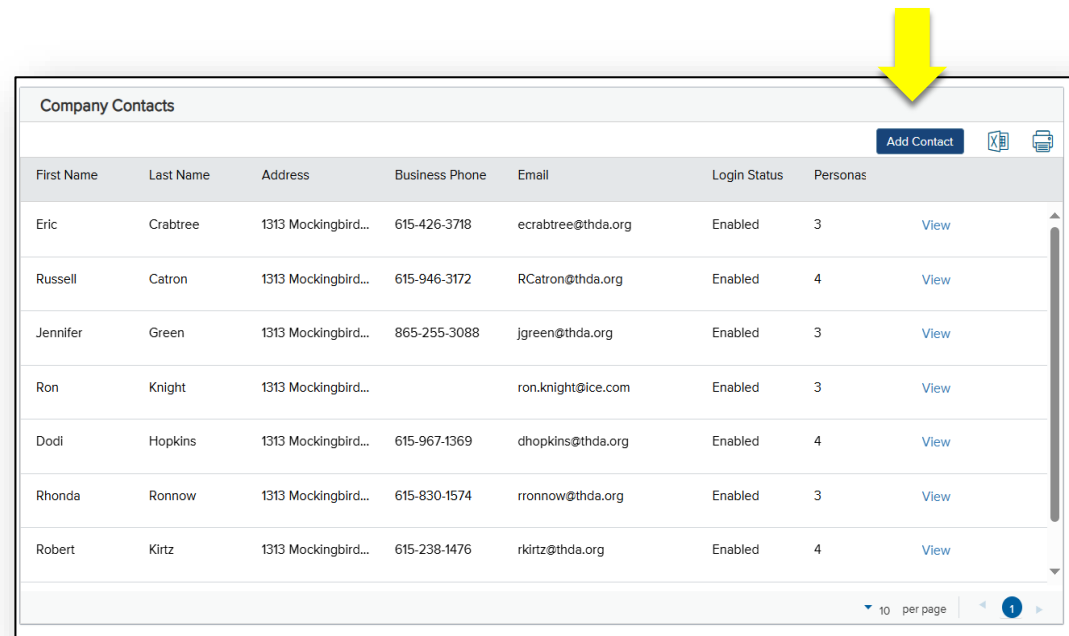
1. Once on the Company Account Tab, scroll down until you see Company Contacts.
2. To create a new user account, you will click the blue Add Contact button.





Personal Account **Company Account** Branches

Company Information

Company DBA Name		Last Loan Submitted Date	5/29/26 11:02:11
Company Legal Name	01 - Test Company	Price Group	
NMLS ID		Originator Type	["Correspondent"]
Address	1313 Mockingbird Lane	VA Originator	Yes
City	San Diego	VA ID	
State	CA	VA Expiration Date	
Zip	92117	FHA Originator	Yes
Business Phone	555-555-5555	FHA Status	



Company Contacts

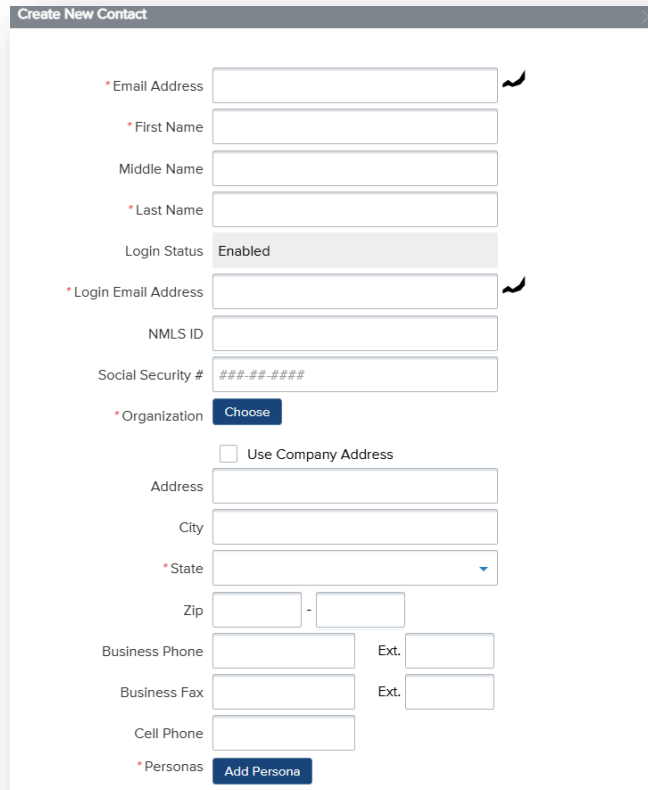
[Add Contact](#)  

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
Eric	Crabtree	1313 Mockingbird...	615-426-3718	ecrabtree@thda.org	Enabled	3	View
Russell	Catron	1313 Mockingbird...	615-946-3172	RCatron@thda.org	Enabled	4	View
Jennifer	Green	1313 Mockingbird...	865-255-3088	jgreen@thda.org	Enabled	3	View
Ron	Knight	1313 Mockingbird...		ron.knight@ice.com	Enabled	3	View
Dodi	Hopkins	1313 Mockingbird...	615-967-1369	dhopkins@thda.org	Enabled	4	View
Rhonda	Ronnow	1313 Mockingbird...	615-830-1574	rronnow@thda.org	Enabled	3	View
Robert	Kirtz	1313 Mockingbird...	615-238-1476	rkirtz@thda.org	Enabled	4	View

10 per page 1

How to Create a New User Account

1. After clicking the blue Add Contact button, a pop-up window will appear. See screenshot below.
2. You will fill in all information that has a red asterisk next to it.
3. We do not require SSN or NMLS though you can include the NMLS if you like.



The screenshot shows a 'Create New Contact' form with the following fields and options:

- *Email Address (required)
- *First Name (required)
- Middle Name
- *Last Name (required)
- Login Status: Enabled
- *Login Email Address (required)
- NMLS ID
- Social Security # (masked with ###-##-####)
- *Organization (required) with a 'Choose' button
- Use Company Address
- Address
- City
- *State (required) with a dropdown menu
- Zip (with a hyphen separator)
- Business Phone and Business Fax (each with an 'Ext.' field)
- Cell Phone
- *Personas (required) with an 'Add Persona' button

Personas and Levels of Access

1. Click on the Blue button that says Add Persona. See screenshot below.
2. You will be directed to the screen on the right to select the correct Persona for your user.
3. The next slide goes over personas and levels of access.

Create New Contact

* Email Address

* First Name

Middle Name

* Last Name

Login Status **Enabled**

* Login Email Address

NMLS ID

Social Security # #####

* Organization **Choose**

Use Company Address

Address

City

* State

Zip -

Business Phone Ext.

Business Fax Ext.

Cell Phone

* Personas **Add Persona**

Contact Persona

Russell Catron

Personas

TPO Lock Desk

TPO Loan Officer

TPO Loan Processor

TPO Post Closing

TPO External Manager

Cancel **Save**

Personas and Levels of Access

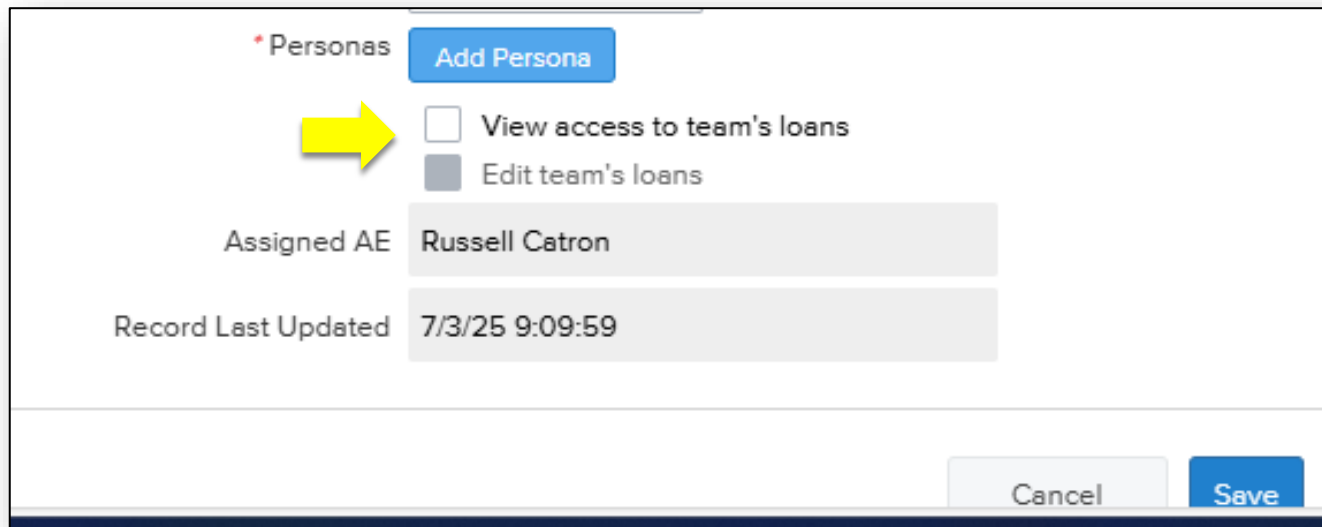
Persona	Core Responsibilities	Who would need this?
External Manager	<ul style="list-style-type: none">• Manages company account and user access• Creates and edits contacts; assigns personas• Grants permissions to view/edit team loans	<ul style="list-style-type: none">• Company Administrators• You are only allowed a maximum of three active admins at one time.
Loan Officer	<ul style="list-style-type: none">• This profile is view-only access.	<ul style="list-style-type: none">• Loan Officers
Lock Desk	<ul style="list-style-type: none">• Handles registering and locking a loan• Processes lock extensions, re-pricing, and cancellations	<ul style="list-style-type: none">• Lock Desk• Loan Officer Assistants who lock loans but do not submit for underwriting.• Loan Officers who are allowed to lock loans• Managers who may lock loans

Personas and Levels of Access

Persona	Core Responsibilities	Who would need this?
Processor	<ul style="list-style-type: none">• Can also do all tasks listed in Lock Desk Persona• Uploads Underwriting Submission Package• Completes required fields and submits for Non-Delegated Review• Uploads and clears underwriting conditions• Retrieves commitment letters and packages	<ul style="list-style-type: none">• Processors• Underwriters• Loan Officer Assistants who lock and/or submit for LOs• Managers who may need to review staff pipelines
Post-Closer	<ul style="list-style-type: none">• Uploads Closed Loan Package• Reviews and submits post-closing and final-docs conditions• Reviews Purchase Advice and tracks key dates	<ul style="list-style-type: none">• Closers• Final Docs• Shipping• Whomever needs to receive Purchase Advice notifications• Managers who may need to review staff pipelines

View and Edit Other Team's Loans

1. Once you have selected the correct persona, you will click save and be directed back to the initial pop-up.
2. You then have the option to allow this user to either view other team members loans, or view and edit other team members loan.
3. This level of access is left up to your organization's preference. Many lenders do not want their Loan Officers to see the whole pipeline while others do not have an issue.



The screenshot shows a configuration window for user access. At the top left, it says '* Personas' with a blue 'Add Persona' button. Below this, a yellow arrow points to two checkboxes: 'View access to team's loans' (unchecked) and 'Edit team's loans' (checked). Underneath, 'Assigned AE' is set to 'Russell Catron' and 'Record Last Updated' is '7/3/25 9:09:59'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Multi-Factor Authentication Requirement

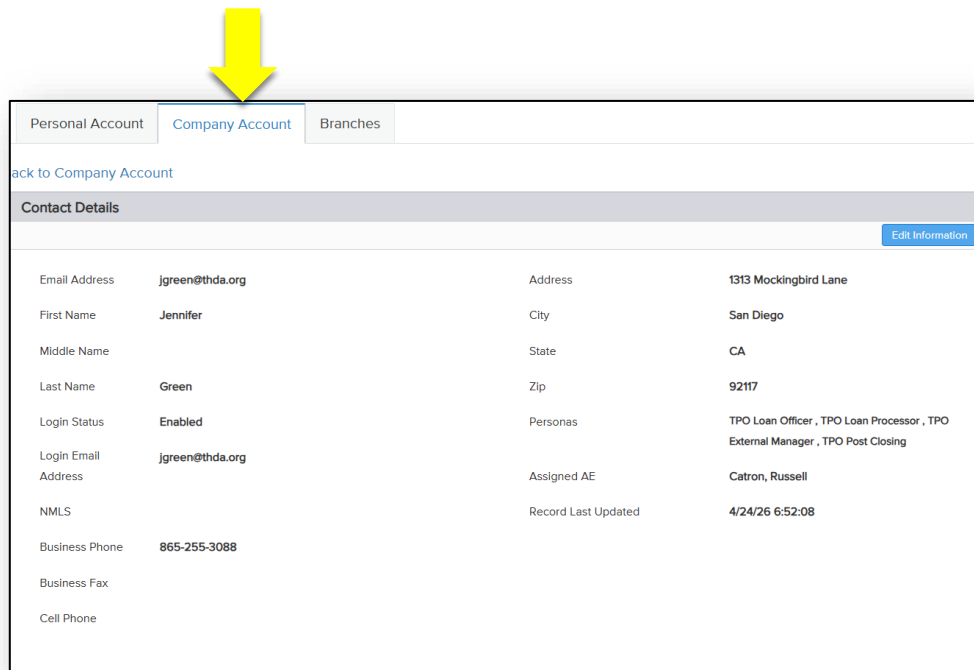
- THDA requires Multi-Factor Authentication each time you log into the portal.
- Cell phone numbers are required. Users can choose to receive a call or text but not an email.
- Please ensure you put a valid phone number into every user account you create.
- Users will not be able to login without it.

Password Requirements

- New Password Requirements are as Follows:
 - A Minimum of 21 Characters
 - At Least One Upper Case Letter
 - At Least One Lower Case Letter
 - At Least One Number
 - At Least One Special Character
- Temporary passwords will expire, and a new temporary password may be needed if a new password is not created by a user or does not meet the requirements above.

How to Disable User Account

1. On the Company Account tab, scroll to the bottom of the page where it shows Company Contacts.
2. Click view next the user account that you need to disable.

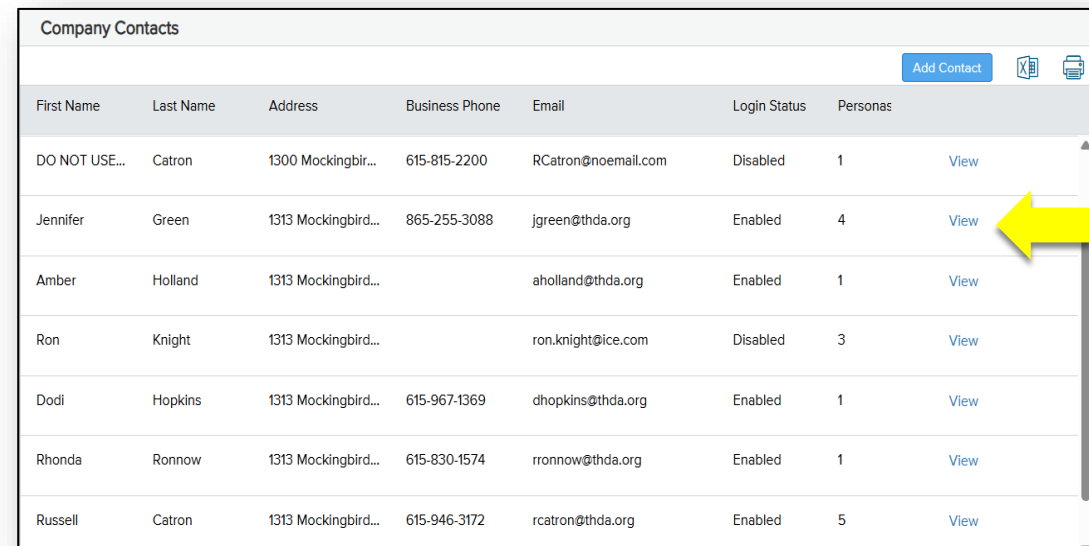


Personal Account **Company Account** Branches

[Back to Company Account](#)

Contact Details [Edit Information](#)

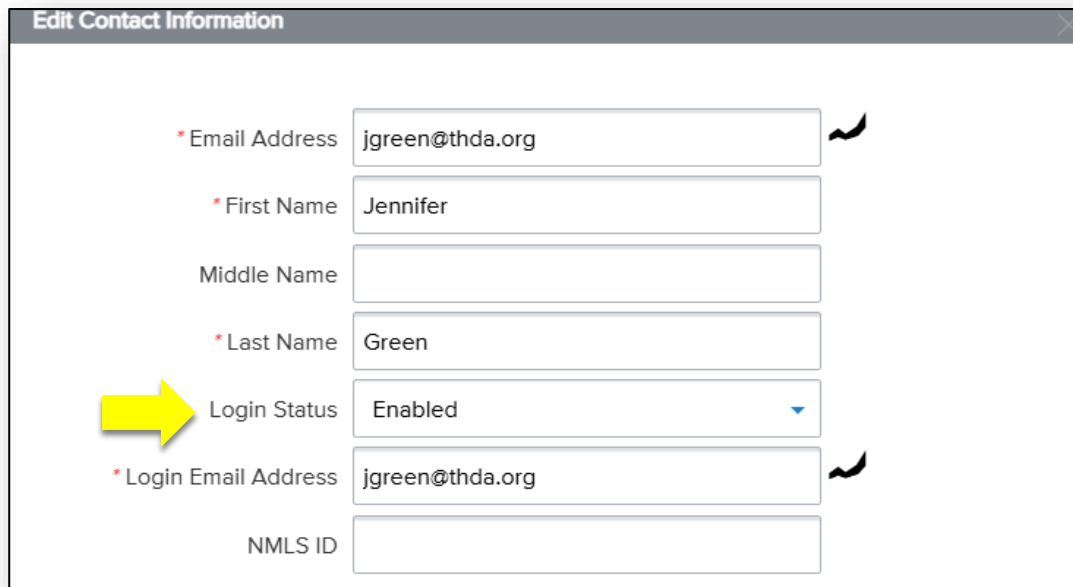
Email Address	jgreen@thda.org	Address	1313 Mockingbird Lane
First Name	Jennifer	City	San Diego
Middle Name		State	CA
Last Name	Green	Zip	92117
Login Status	Enabled	Personas	TPO Loan Officer , TPO Loan Processor , TPO External Manager , TPO Post Closing
Login Email Address	jgreen@thda.org	Assigned AE	Catron, Russell
NMLS		Record Last Updated	4/24/26 6:52:08
Business Phone	865-255-3088		
Business Fax			
Cell Phone			



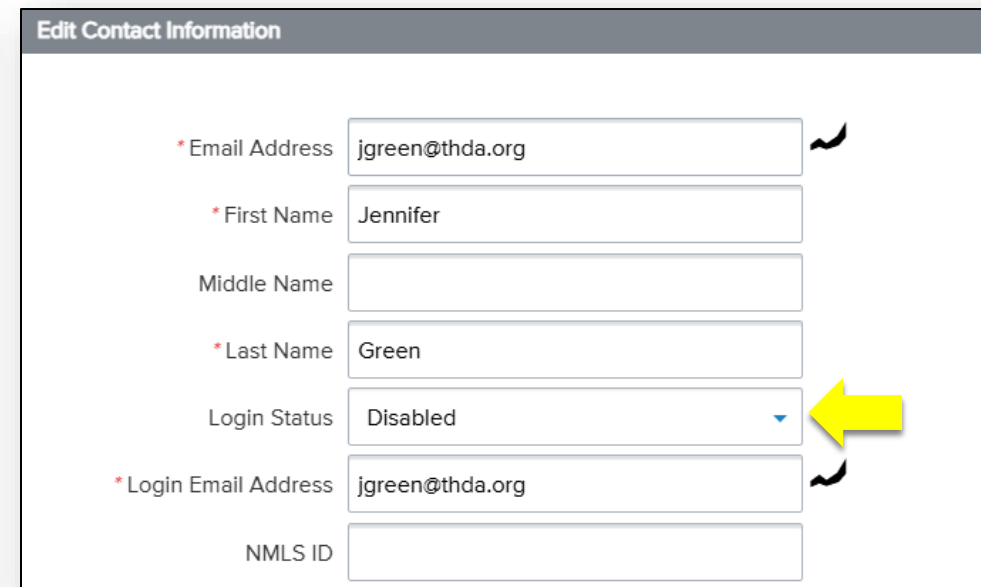
First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
DO NOT USE...	Catron	1300 Mockingbir...	615-815-2200	RCatron@noemail.com	Disabled	1	View
Jennifer	Green	1313 Mockingbird...	865-255-3088	jgreen@thda.org	Enabled	4	View
Amber	Holland	1313 Mockingbird...		aholland@thda.org	Enabled	1	View
Ron	Knight	1313 Mockingbird...		ron.knight@ice.com	Disabled	3	View
Dodi	Hopkins	1313 Mockingbird...	615-967-1369	dhopkins@thda.org	Enabled	1	View
Rhonda	Ronnow	1313 Mockingbird...	615-830-1574	rronnow@thda.org	Enabled	1	View
Russell	Catron	1313 Mockingbird...	615-946-3172	rcatron@thda.org	Enabled	5	View

How to Disable User Account

1. Click on the dropdown menu next to Login Status.
2. Click Disabled and Save.
3. You can disable an account but cannot delete them.
4. Do not erase data and fill in new information on that same user.



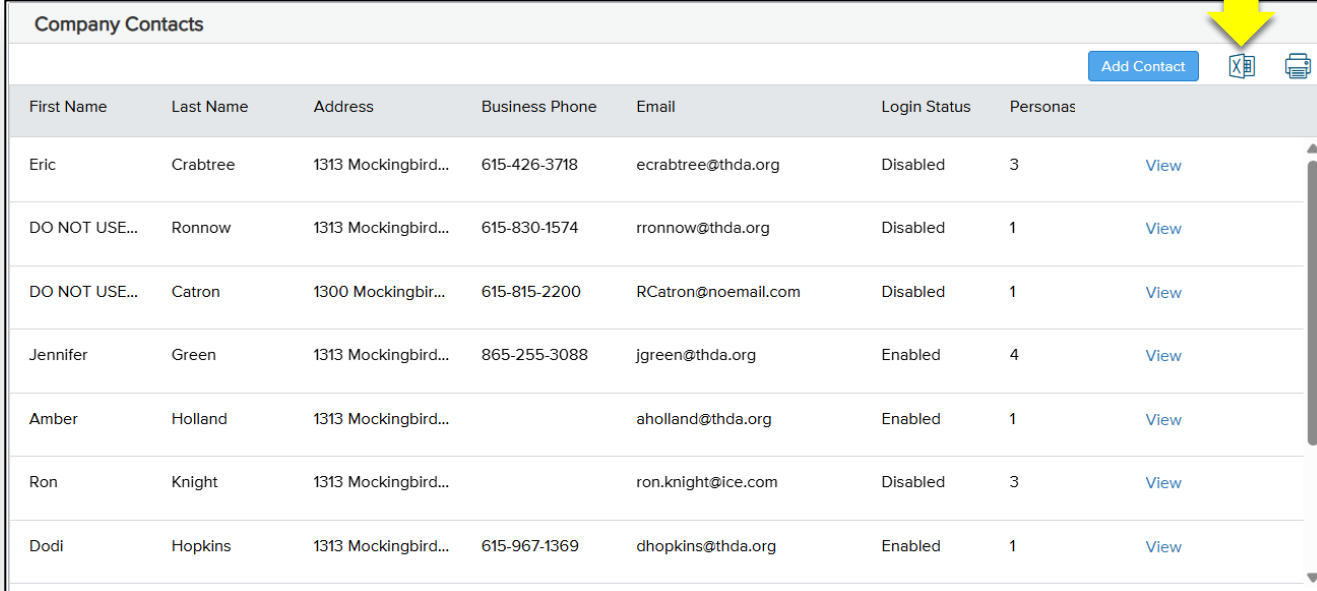
The screenshot shows a web form titled "Edit Contact Information" with a close button in the top right corner. The form contains several input fields: "Email Address" (jgreen@thda.org), "First Name" (Jennifer), "Middle Name" (empty), "Last Name" (Green), "Login Status" (Enabled), "Login Email Address" (jgreen@thda.org), and "NMLS ID" (empty). A yellow arrow points to the "Login Status" dropdown menu.



The screenshot shows the same "Edit Contact Information" form, but the "Login Status" dropdown menu is now set to "Disabled". A yellow arrow points to the "Login Status" dropdown menu.

How to Export User List

1. Under Company Contacts, you will see an excel icon at the top right of the screen next to the add contact button.
2. Click the icon to download a spreadsheet of your company's users.
3. We recommend doing this regularly to keep your user list current and make any necessary changes.

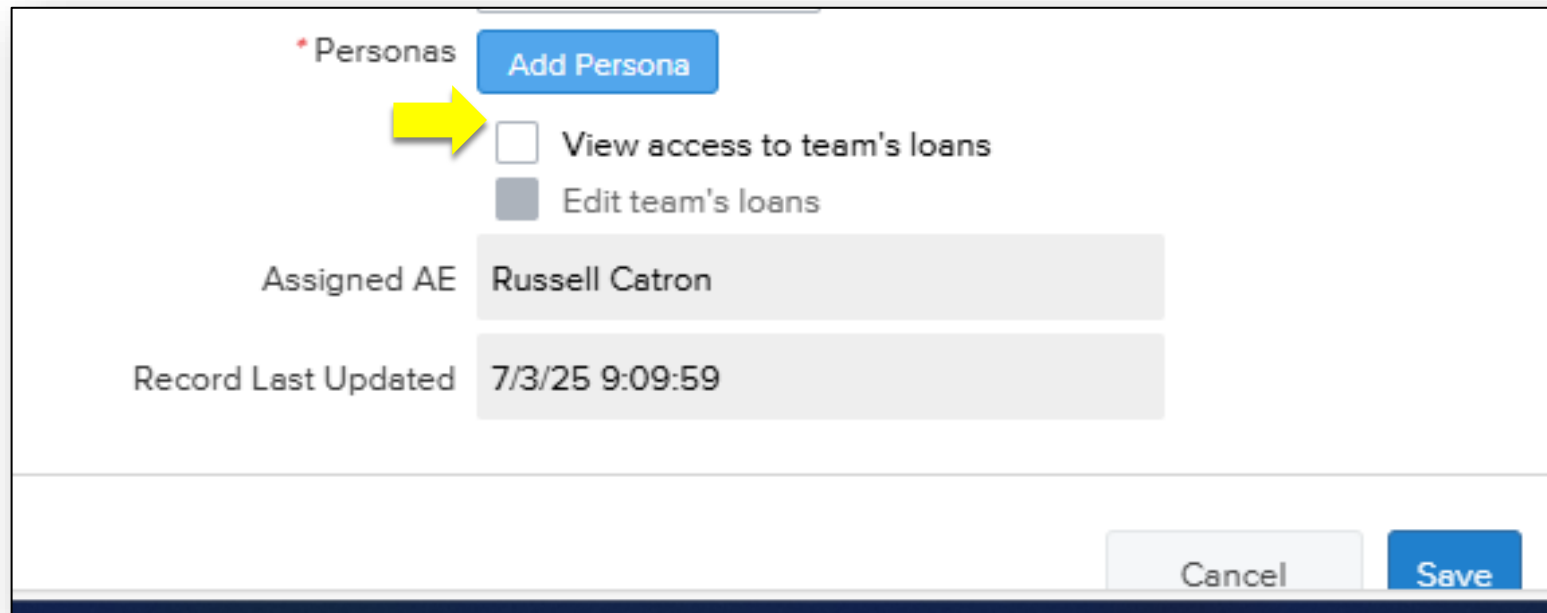


The screenshot shows a web interface titled "Company Contacts". At the top right, there is a blue "Add Contact" button, an Excel icon, and a print icon. A yellow arrow points to the Excel icon. Below the header is a table with the following columns: First Name, Last Name, Address, Business Phone, Email, Login Status, and Personas. Each row also has a "View" link.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
Eric	Crabtree	1313 Mockingbird...	615-426-3718	ecrabtree@thda.org	Disabled	3	View
DO NOT USE...	Ronnow	1313 Mockingbird...	615-830-1574	rronnow@thda.org	Disabled	1	View
DO NOT USE...	Catron	1300 Mockingbir...	615-815-2200	RCatron@noemail.com	Disabled	1	View
Jennifer	Green	1313 Mockingbird...	865-255-3088	jgreen@thda.org	Enabled	4	View
Amber	Holland	1313 Mockingbird...		aholland@thda.org	Enabled	1	View
Ron	Knight	1313 Mockingbird...		ron.knight@ice.com	Disabled	3	View
Dodi	Hopkins	1313 Mockingbird...	615-967-1369	dhopkins@thda.org	Enabled	1	View

Troubleshooting

1. If you have a user who states they cannot see other people's loans, there is a simple fix.
2. You would log into their user account and select either one or both options below to view and/or edit teams' loans.
3. Click Save.



* Personas

View access to team's loans

Edit team's loans

Assigned AE

Record Last Updated

A yellow arrow points to the 'View access to team's loans' checkbox.

Troubleshooting

1. If you have a user that states they are not receiving the MFA code when they try to login, there is a simple trick for that.
2. Have the user click the back button on the screen when they try to login and then click CTRL F5.
3. Once this is completed, have them refresh and login again.



Tennessee Housing Development Agency

THANK YOU!
