Tennessee Housing Development Agency

TPOC Portal Training

EXTERNAL MANAGER- COMPANY ADMINISTRATOR ROLE

Latest Revision: 05.2026

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

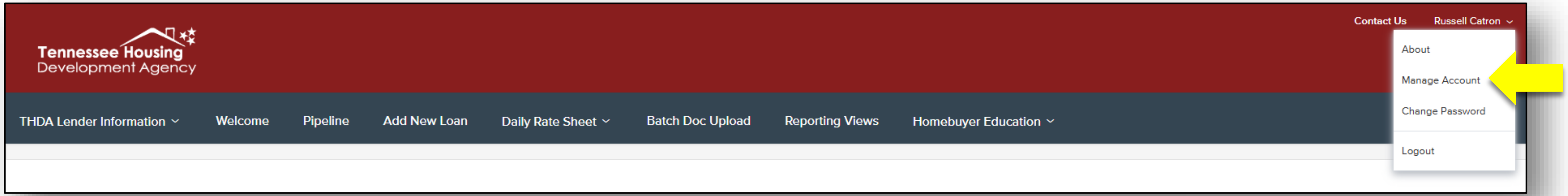
- Group distribution email accounts cannot be used to log in to the system.
- They can be used for notifications and assigned to specific loans.
- When setting up these accounts, use a fictitious phone number such as 555-555-5555 so that Multi-Factor Authentication will not work.

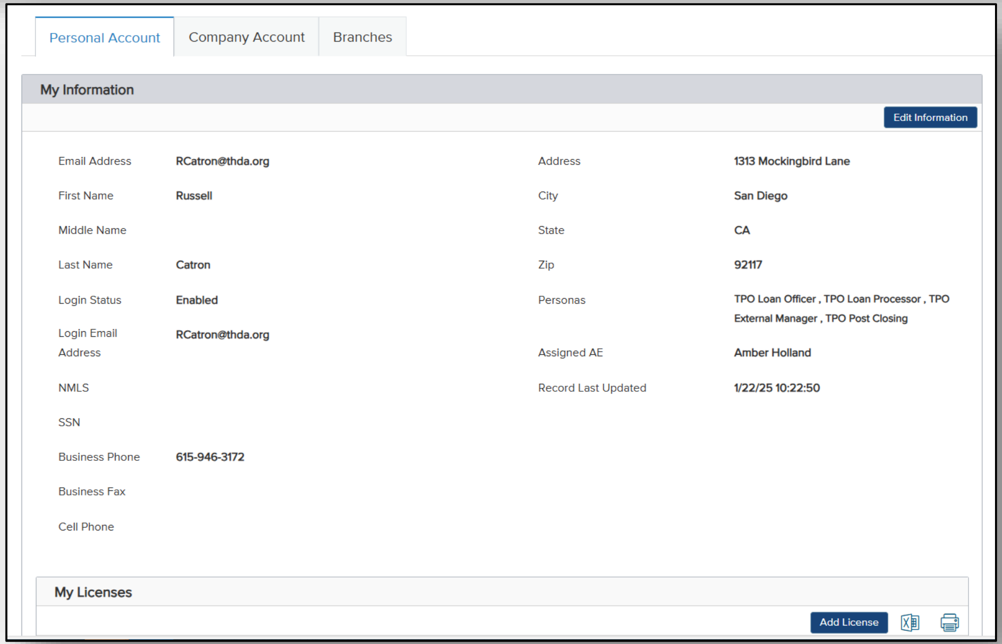
Auditing & Reporting

- 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.





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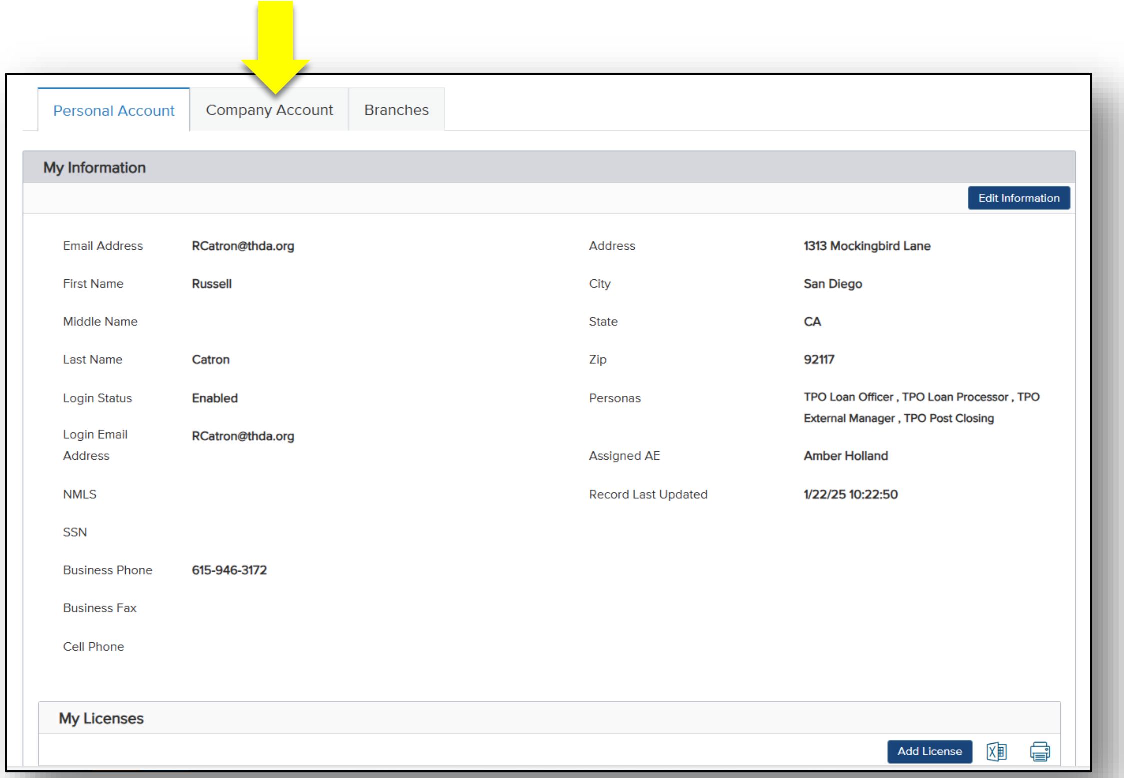
Update Company Account Information

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.



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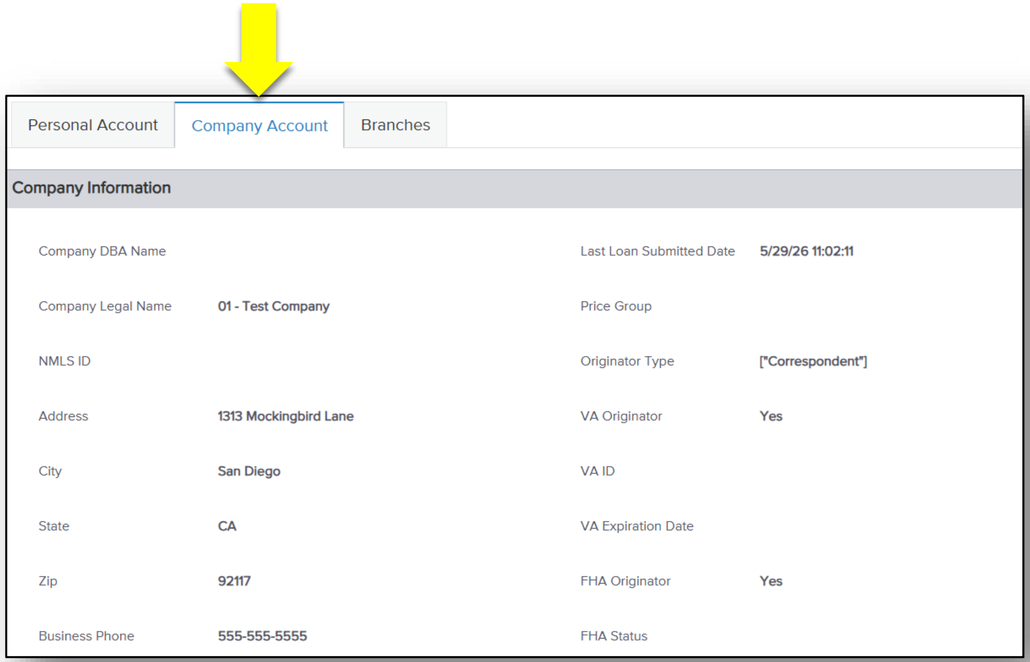
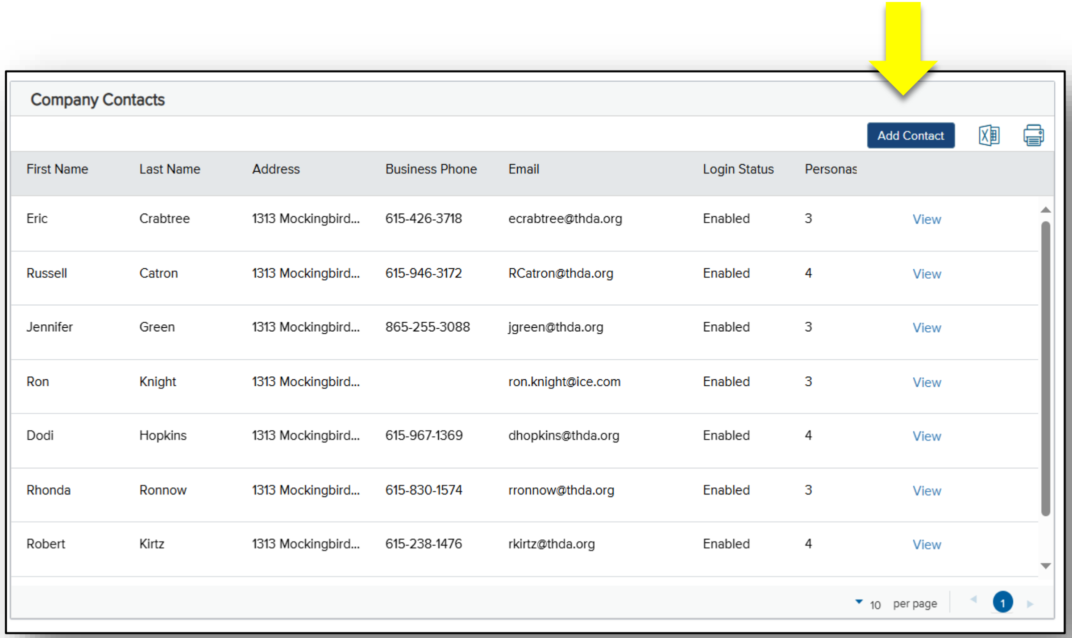
Account Information

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.





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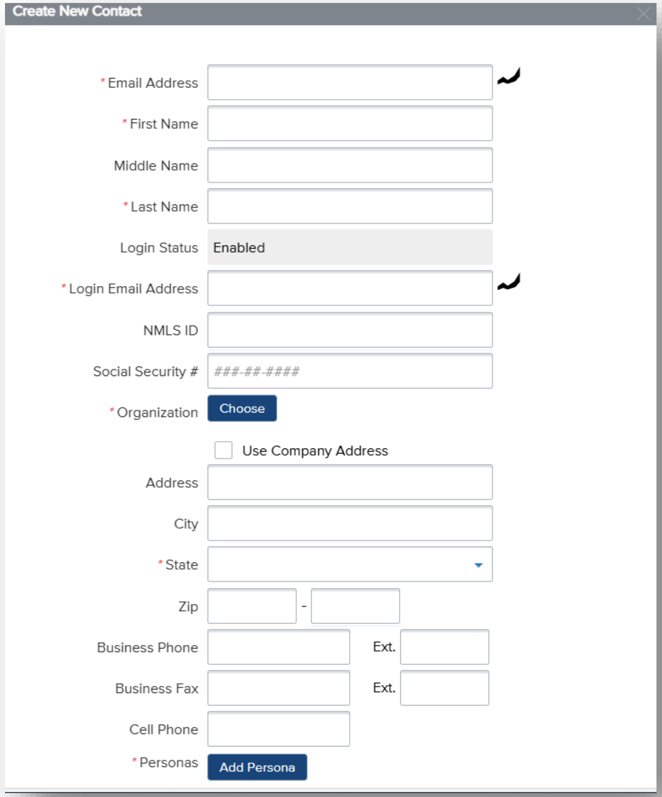
How to Create a New User Account

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.



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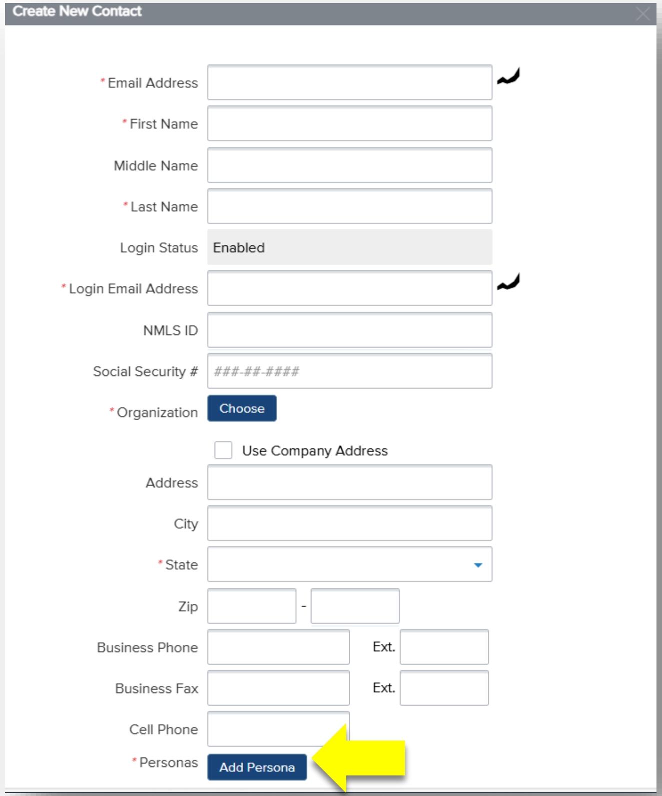
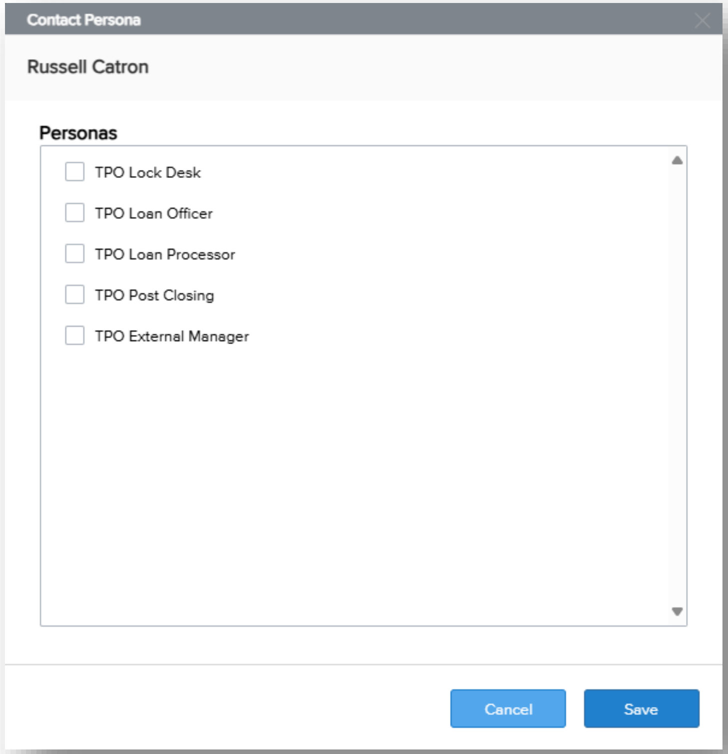
Personas and Levels of Access

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.





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Personas and Levels of Access

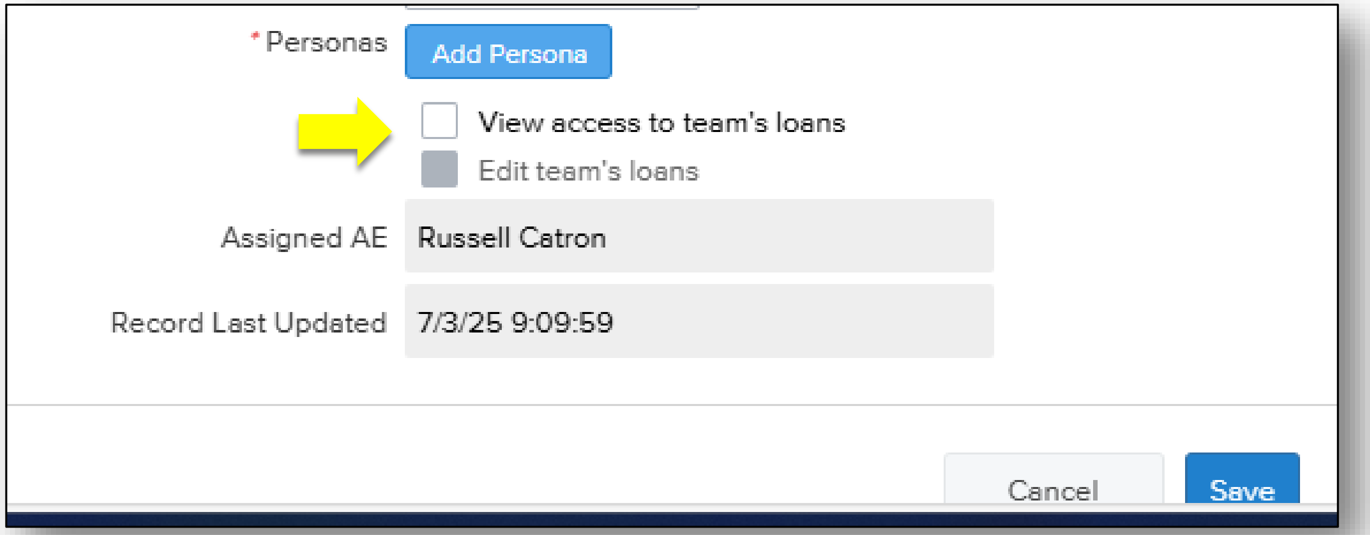
Persona	Core Responsibilities	Who would need this?
External Manager	• Manages company account and user access • Creates and edits contacts; assigns personas • Grants permissions to view/edit team loans	• Company Administrators • You are only allowed a maximum of three active admins at one time.
Loan Officer	• This profile is view-only access.	• Loan Officers
Lock Desk	• Handles registering and locking a loan • Processes lock extensions, re-pricing, and cancellations	• 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	• 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	• Processors • Underwriters • Loan Officer Assistants who lock and/or submit for LOs • Managers who may need to review staff pipelines
Post-Closer	• Uploads Closed Loan Package • Reviews and submits post-closing and final-docs conditions • Reviews Purchase Advice and tracks key dates	• 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.



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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.

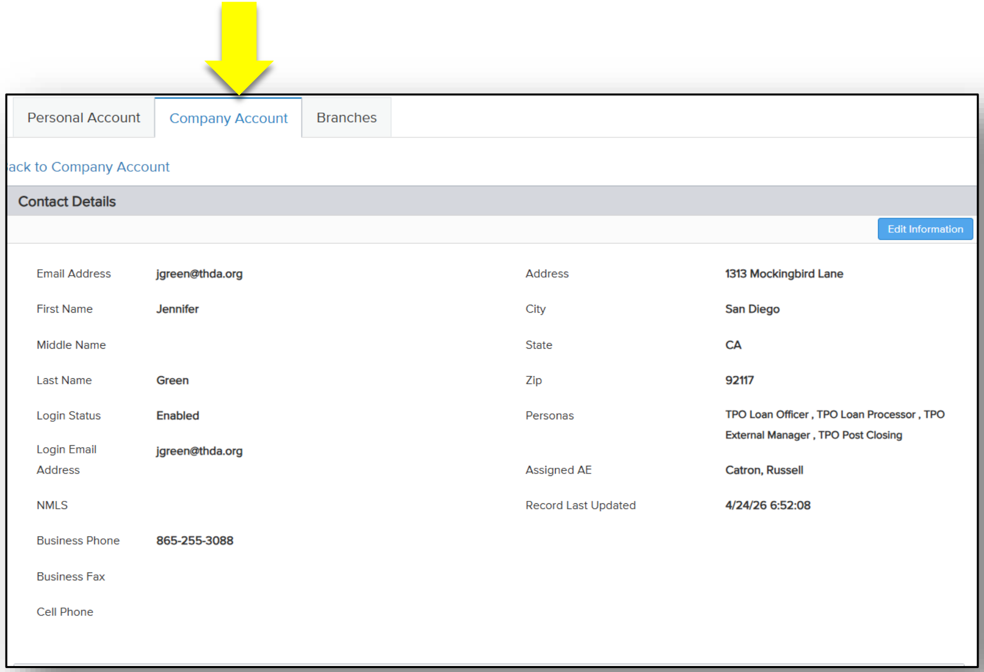
Password Requirements

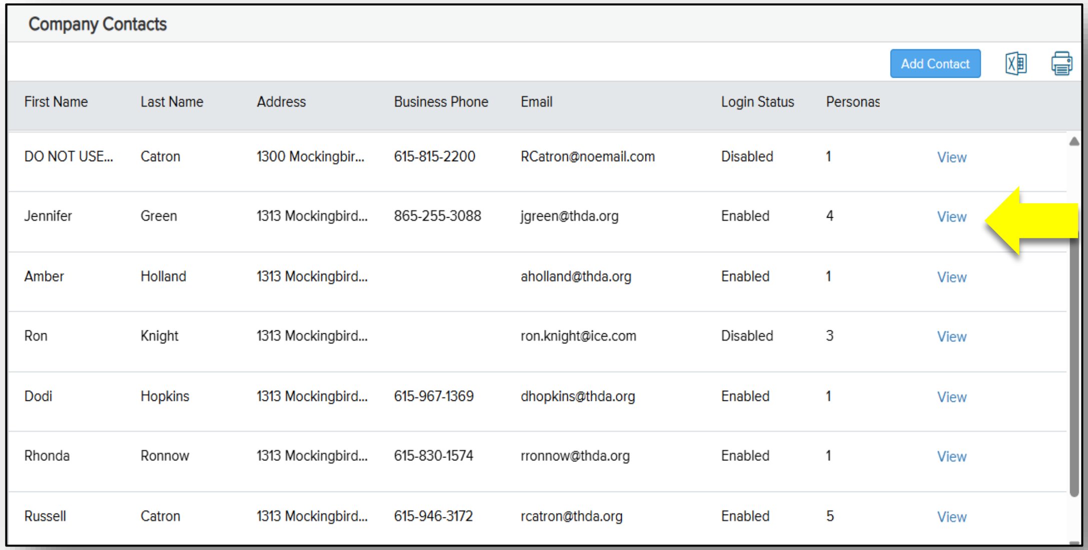
- New Password Requirements are as Follows:
  - A Minimum of 21 Characters
  - At Least One Upper Case Letter
  - At Least One Lower Case Letter
  - At Least One Number
  - At Least One Special Character
- Temporary passwords will expire, and a new temporary password may be needed if a new password is 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.





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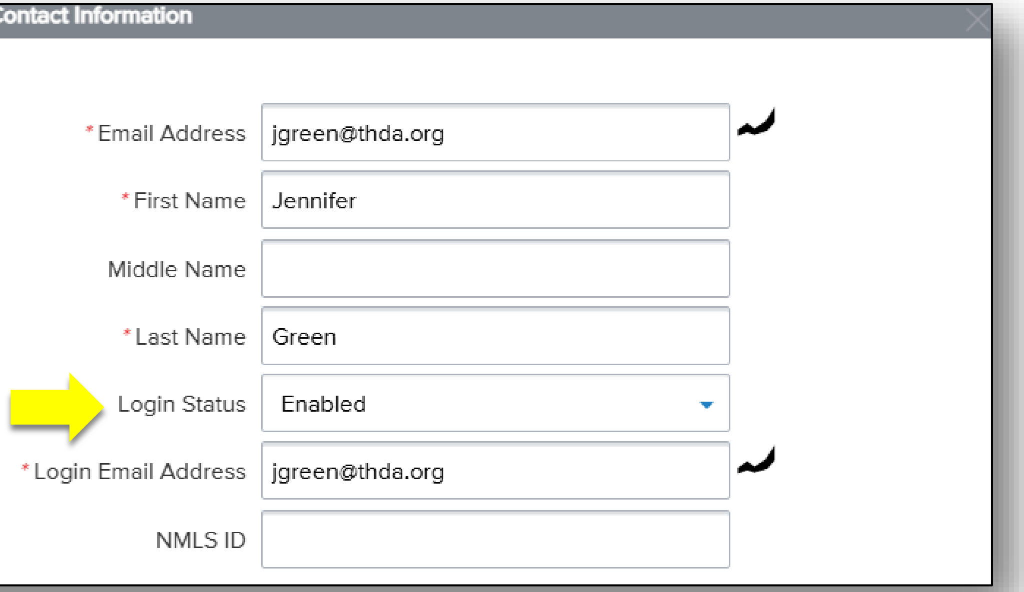
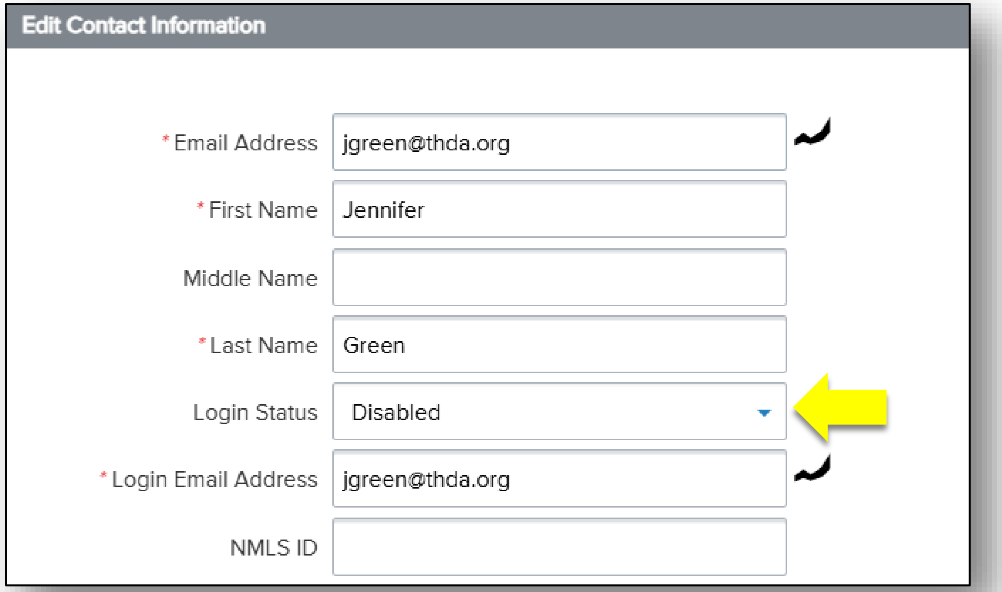
How to Disable User Account

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.





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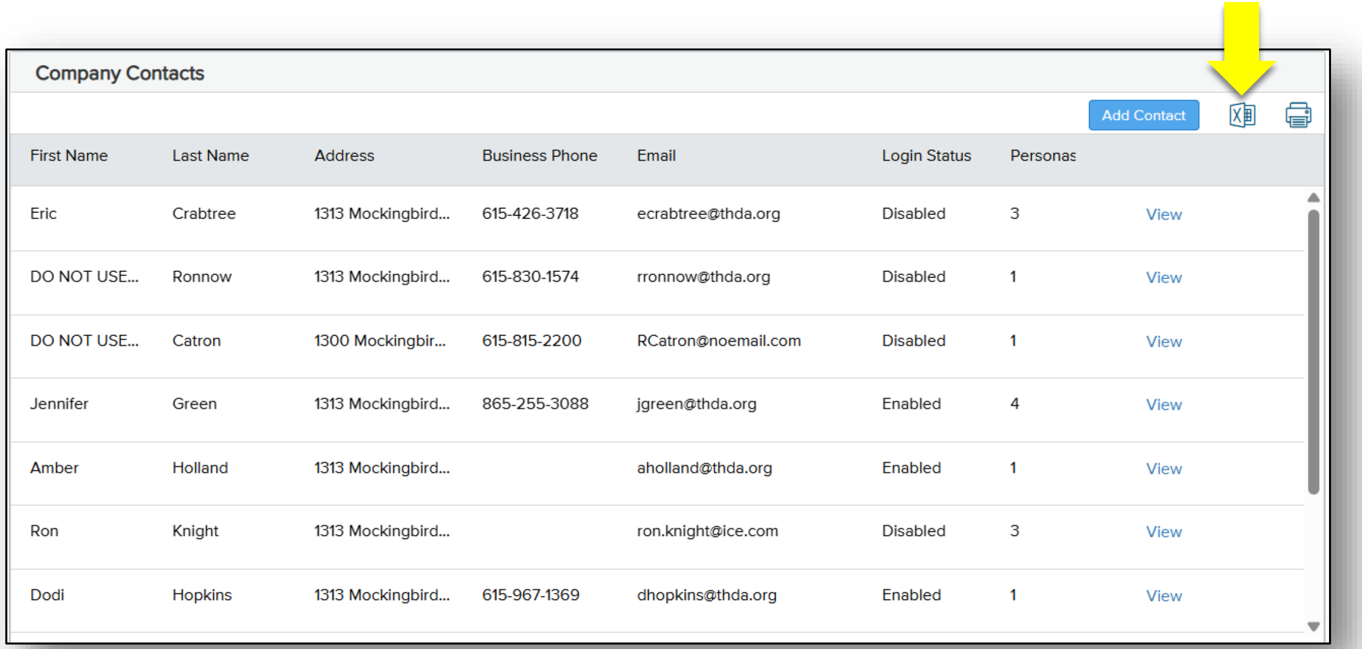
How to Export User List

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.



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

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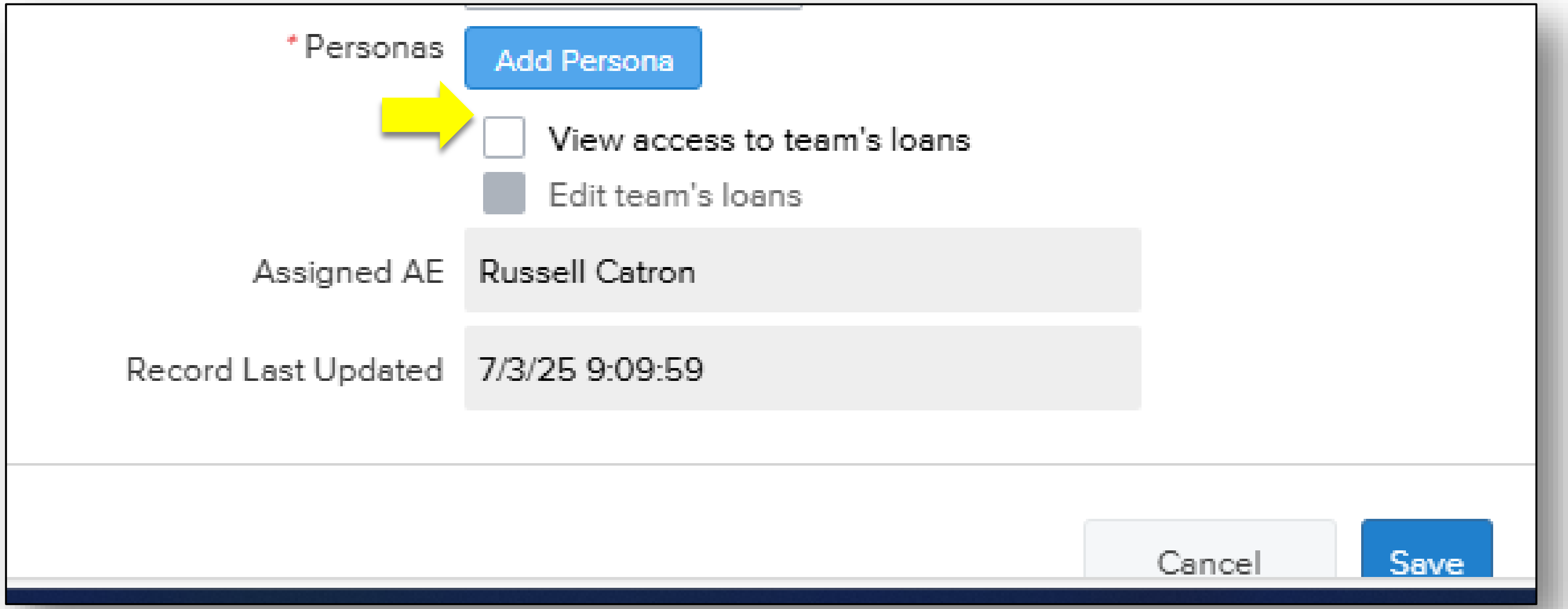
Troubleshooting

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.



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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.

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THANK YOU!