



TPOC Portal Training

LOAN OFFICERS

Learning Objectives

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

- Locate your Pipeline
- Understand Your Level of Access
- Understand the Process to Request Access to View All Loans
- Understand the Process to Request Lock Desk Capabilities

Helpful Contacts

General Questions

SFAsk@thda.org

Lock Questions

lockdesk@thda.org

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Yvonne Hall

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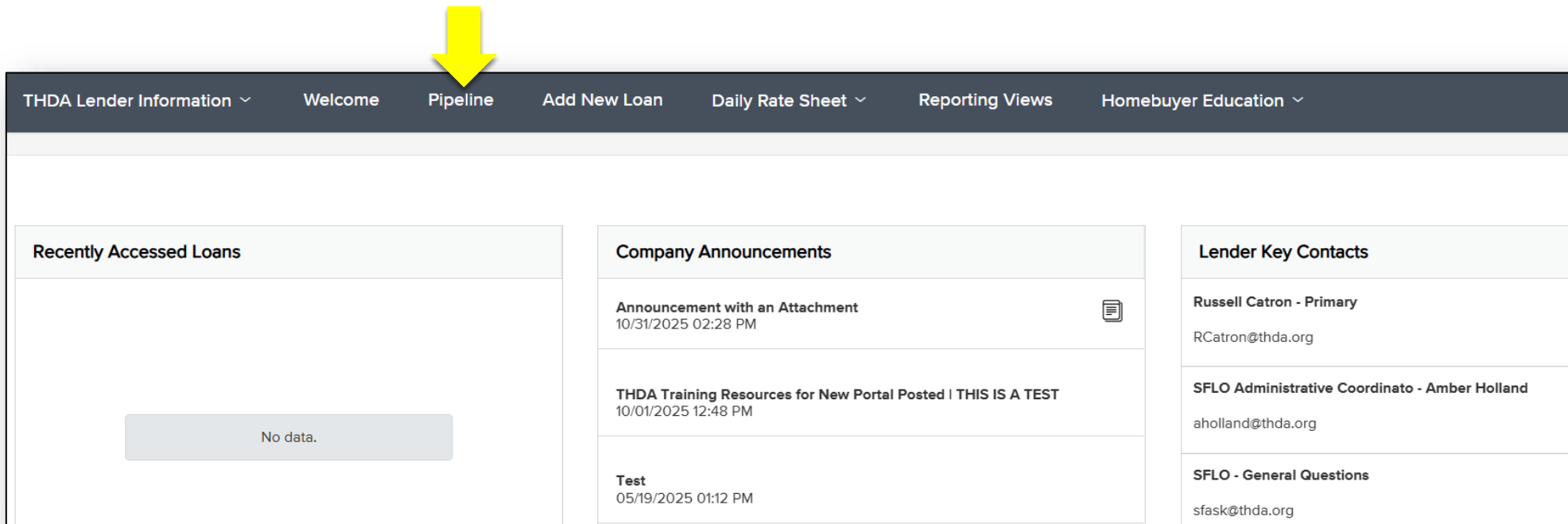
Russ Catron

SF Program Development Coordinator

rcatron@thda.org

Pipeline Management

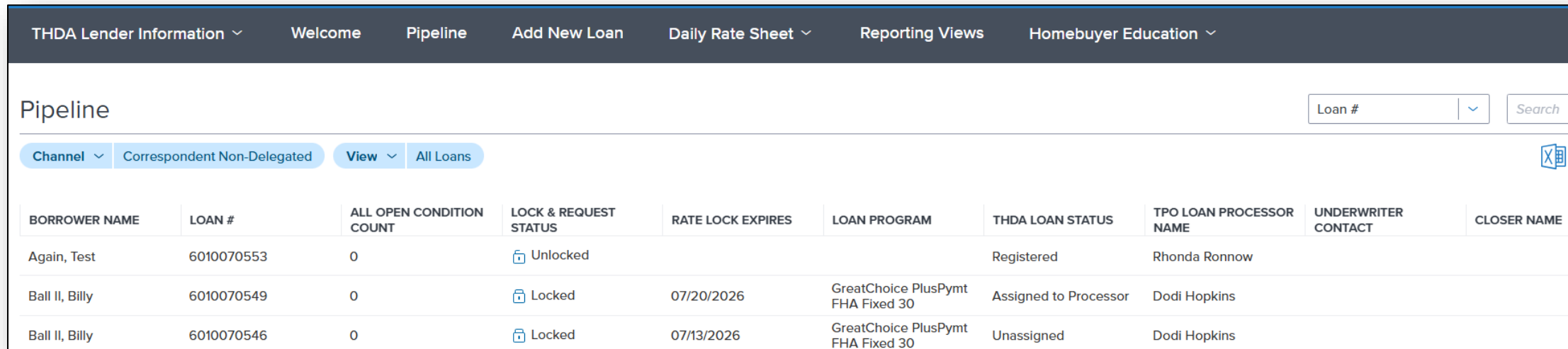
1. Once you log into TPOC, you will see your dashboard similar to the screenshot below.
2. To view your assigned loans, click on Pipeline.



The screenshot shows the TPOC dashboard interface. At the top, there is a dark navigation bar with several menu items: 'THDA Lender Information', 'Welcome', 'Pipeline', 'Add New Loan', 'Daily Rate Sheet', 'Reporting Views', and 'Homebuyer Education'. A large yellow arrow points directly to the 'Pipeline' menu item. Below the navigation bar, the dashboard is divided into three main sections: 'Recently Accessed Loans', 'Company Announcements', and 'Lender Key Contacts'. The 'Recently Accessed Loans' section is currently empty, displaying 'No data.' The 'Company Announcements' section contains three items: 'Announcement with an Attachment' (dated 10/31/2025 02:28 PM), 'THDA Training Resources for New Portal Posted | THIS IS A TEST' (dated 10/01/2025 12:48 PM), and 'Test' (dated 05/19/2025 01:12 PM). The 'Lender Key Contacts' section lists three contacts: 'Russell Catron - Primary' (email: RCatron@thda.org), 'SFLO Administrative Coordinato - Amber Holland' (email: aholland@thda.org), and 'SFLO - General Questions' (email: sfask@thda.org).

Pipeline Management

1. You will now see all loans assigned to you that are in your pipeline.
2. It is important to understand that the Loan Officer persona is **View Only**.
3. You will not be able to edit any loans unless given access by your administrator.



The screenshot displays a web application interface for Pipeline Management. At the top, there is a navigation bar with the following items: THDA Lender Information (dropdown), Welcome, Pipeline, Add New Loan, Daily Rate Sheet (dropdown), Reporting Views, and Homebuyer Education (dropdown). Below the navigation bar, the main content area is titled "Pipeline". On the right side of this area, there is a search box labeled "Loan #" with a dropdown arrow and a "Search" button. Below the search box, there are two tabs: "Channel" (dropdown) and "Correspondent Non-Delegated". To the right of these tabs is a "View" dropdown and a button labeled "All Loans". A small icon of a document with a checkmark is visible on the right side of the table area. The table itself has the following columns: BORROWER NAME, LOAN #, ALL OPEN CONDITION COUNT, LOCK & REQUEST STATUS, RATE LOCK EXPIRES, LOAN PROGRAM, THDA LOAN STATUS, TPO LOAN PROCESSOR NAME, UNDERWRITER CONTACT, and CLOSER NAME. The table contains three rows of data:

BORROWER NAME	LOAN #	ALL OPEN CONDITION COUNT	LOCK & REQUEST STATUS	RATE LOCK EXPIRES	LOAN PROGRAM	THDA LOAN STATUS	TPO LOAN PROCESSOR NAME	UNDERWRITER CONTACT	CLOSER NAME
Again, Test	6010070553	0	Unlocked			Registered	Rhonda Ronnow		
Ball II, Billy	6010070549	0	Locked	07/20/2026	GreatChoice PlusPymt FHA Fixed 30	Assigned to Processor	Dodi Hopkins		
Ball II, Billy	6010070546	0	Locked	07/13/2026	GreatChoice PlusPymt FHA Fixed 30	Unassigned	Dodi Hopkins		

What to do if you need to see all loans?

1. If you feel that you need to be able to see other team members loans, you will need to reach out to your company administrator to request that level of access.
2. If you do not know your company administrator, please email sfask@thda.org for assistance.

What to do if you need to lock a loan?

1. If your organization allows Loan Officers to register and lock loans, you will need to reach out to your company administrator to request that level of access.
2. We keep this duty separate due to many lenders not allowing the practice.
3. If you do not know your company administrator, please email sfask@thda.org for assistance.



Tennessee Housing Development Agency

THANK YOU!
