Broker Version TPO Pipeline Manager FAQ's

How do I receive my credentials?

Broker credentials are sent by Carrington staff to the emails on file. If a broker has not received their credentials or accidently misplaced them you should first click on "Forgot Password" and a temporary password will be sent to the email on file. If you received an error contact pipelinemanager@carringtonms.com or one of the following Carrington employees:

1. Nancy Kluender @ 949.517.6160
2. Teresa Cortez @ 949.517.5507
3. Brenda Hager @ 949.517.6188

Can I click on "Forgot Password" and have my credentials sent to me?

Yes, this is the preferred method as you will get credentials within seconds of submitting the request.

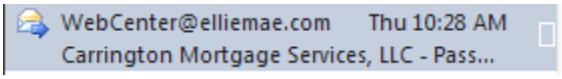
Need to type your email and hit submit.

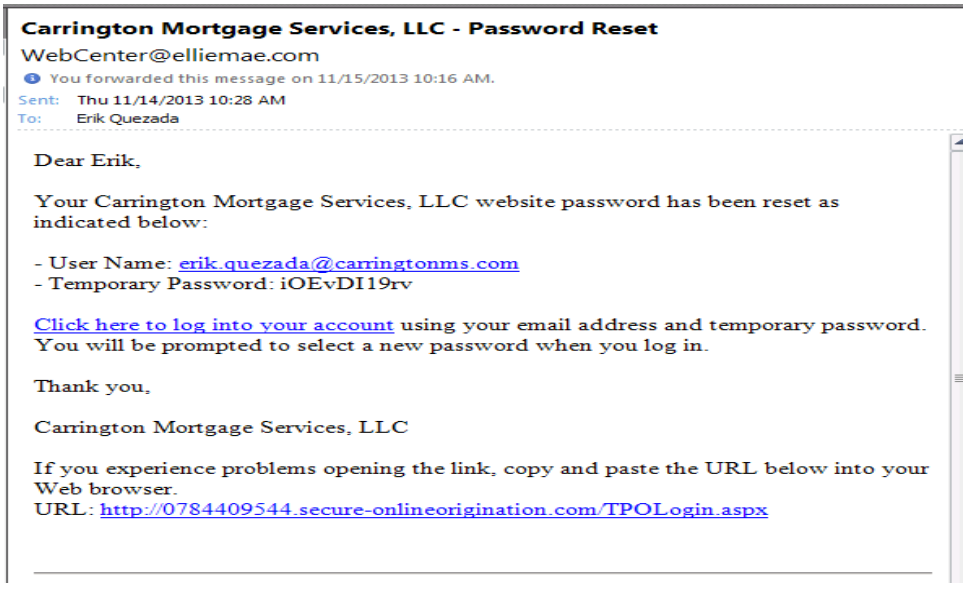
If you receive the following error when clicking submit you are not setup. For loan officers and processors the branch administrator must set them up for broker or administrator who are trying to login for the first time contact pipelinemanager@carringtonms.com.

Who emails credentials and what does the subject say?

Email comes from WebCenter@elliemae.com, Subject: **Carrington Mortgage Services, LLC – Password Reset**.

Example:





Who provides credentials to my staff?

Carrington provides credentials to all emails on file. If a processor or loan officer was not on file at the time credentials went out the responsibility falls on the administrator.

Video on how to setup credentials for broker staff: http://bcove.me/t8x9spro

What training materials are available?

Training guide and step by step videos can be found under:

http://carringtonwholesale.com/broker-center/training-center/

What the website to the new pipeline manager?

https://0784409544.secure-onlineorigination.com/TPOLogin.aspx

Am I required to cancel all my loans from the old pipeline manager and move them to the new pipeline manager?

No, all loans uploaded in the old pipeline manager before the deadline will fund using the old system. Brokers will continue to have access to the old pipeline manager until all loans fund. Carrington will only disable the ability to register new loans.

What happens to my forward locks in the old pipeline manager?

Forward locks in the old pipeline manager before the deadline will not be impacted. Lock Desk will not transfer any loans that are locked to the new pipeline manager.

What happens after the deadline?

Broker's access to register a loan will be disabled for the old pipeline manager. You will continue to work on any loan that registered-funding.

Will my credentials for their old pipeline manager change with the new system?

No, your old pipeline manager credentials are not impacted by the new one.

How do I order a FHA case number in TPO/Pipeline Manager?

FHA case numbers will be generated during the setup process. If there is an urgent need to order a FHA case number before submission you can complete the FHA case number request form and email it to FHACaseNumbers@carringtonms.com.

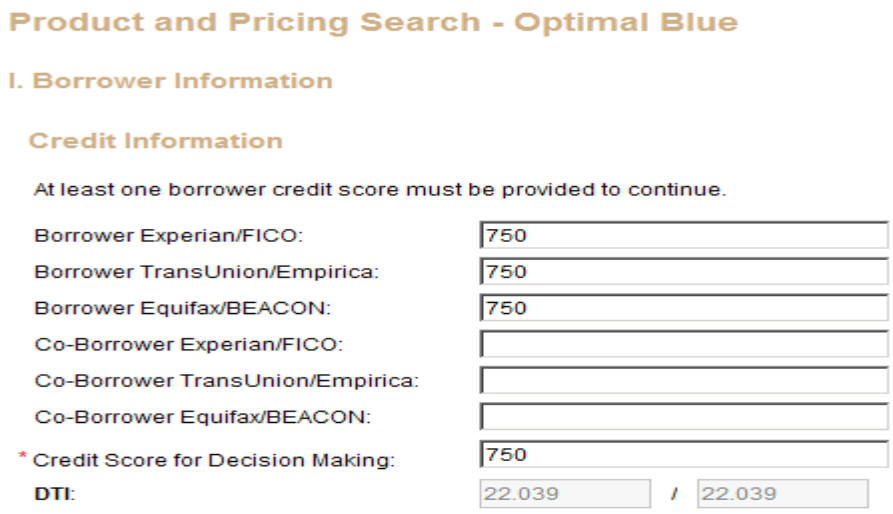
I tried submitting a loan in TPO/Pipeline Manager however I received an error stating "Product and Pricing" was not updated.

Each loan submission must run through Optimal Blue for product and pricing, once in OB you are required to select an eligible product with pricing. Once you select a product and pricing you must either "Update Encompass" or "Request a Lock". Once the selection is made you will be able to submit.

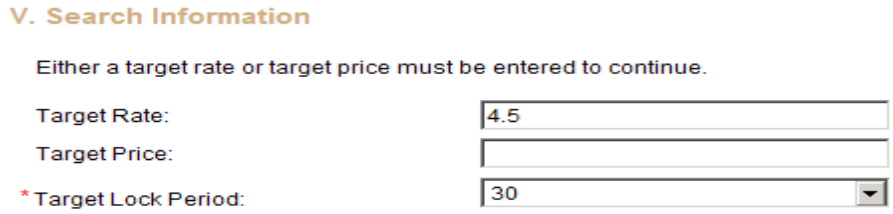
Video link on how to update product and pricing: http://bcove.me/27k9e9kc

I am trying to price my loan and have everything filled in with the red asterisk however I'm still receiving an error.

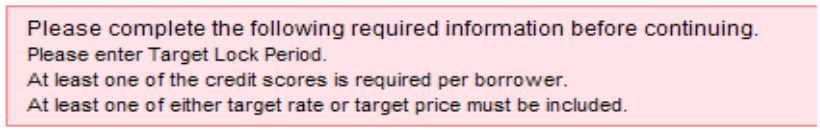
In order to generate a product and price you must provide the mid FICO along with all the FICO scores for each borrower.



You also need to complete target rate or price along with term.



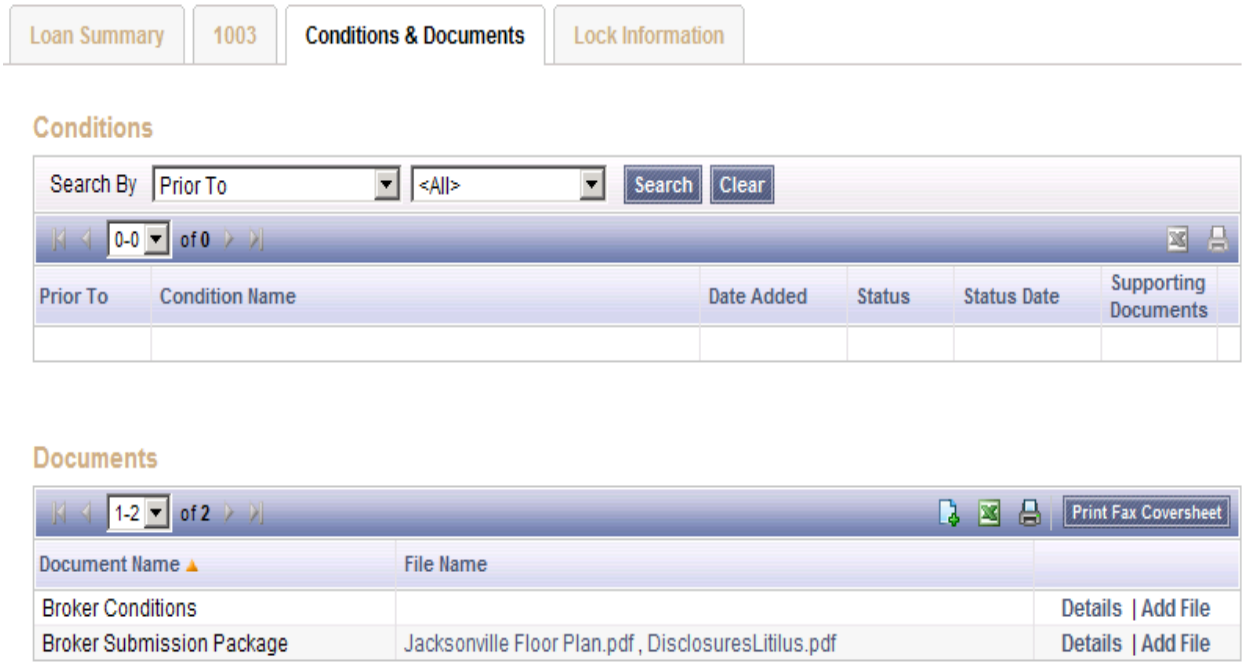
You will receive the following error if left blank.



Video link on how to update product and pricing: http://bcove.me/27k9e9kc

What the standard operating procedure for uploading broker conditions?

Broker conditions are uploaded under “Conditions & Documents” tab broker conditions.



Video on how to upload conditions: http://bcove.me/0viipjq1

Can an Admin have multiple logins if they are also a Loan Officer?

You can only have one login per contact however an admin has the rights to submit and process loans.

Your contacts are managers, admins, loan officers, or loan processors who will be accessing your TPO Pipeline site via the Internet.

The following types of contacts can be created:

- **Manager** - This user is the primary contact for the company or branch and is often the broker/owner. Mangers may manage user accounts and update the company or branch account information. They also have access to all loan files originated under their branch and can set up a user as an admin.
  - One of the steps included in adding a company or branch is creating a manager contact. In order to assign a new manager contact to a company or branch, follow the steps below to create an admin, loan officer, or loan processor contact, and then return to the Edit Company Details or Edit Branch Details page and select the contact from the Manager drop-down list.
- **Admin -** An admin can be assigned to maintain the day-to-day set up of the company's contacts.
  - A company can have multiple admin contacts.
  - Admins may view, edit and create contacts, originate and edit loans, and view or edit loans created by other contacts in their company.
- **Loan Officer -** Loan officers can edit only their contact information. They may create loans and edit loans where they are the assigned loan officer.
- **Loan Processor -** Loan processors can edit only their contact information. They may edit loans where they are the assigned loan processor or they may edit loans created by other contacts in their company.
- **LO and LP -** LO and LP is a combination of the Loan Officer and Loan Processor contacts. This contact can assign themselves as the loan officer and loan processor when creating a loan and self-process their own loans.

Is TPO/Pipeline Manager compatible with Microsoft 8 and Internet Explorer 11?

It has been determined that the Ellie Mae technical team has not yet validated the end-to-end functionality of the Encompass SmartClient on Windows 8.

Therefore, Windows 8 is not yet considered a supported workstation operating system for use with Encompass. Clients who may have had some success running Encompass on Windows 8 workstations have reported to us that critical functionality of Encompass no longer works after upgrading to Microsoft Windows 8 and Internet Explorer 11.

As a result of this impaired functionality, and no known viable workaround to issues reported, we strongly advise against updating to Microsoft Windows 8 on workstations which are intended to run Encompass, as well as refraining from updating to Internet Explorer 11.

To Uninstall IE11:

1. Click the Start button, type Programs and Features in the search box, and then select View installed updates.
2. Under Uninstall an update, scroll down to the Microsoft Windows section.
3. Right-click [Windows] Internet Explorer 11, click Uninstall, and then, when prompted, click Yes.
4. Restart.

Or they can use Chrome, Firefox or another browser as a workaround.

We will continue to monitor this situation and update you.