

Portal User Guide

Uploading Conditions or Closed Loan Package

Revised 07/15/2025



ACCMortgage
— CORRESPONDENT —



Introduction:

This quick reference guide outlines the condition and closed loan package uploading process through the TPO portal.

Uploading Conditions and/or Uploading the Closed Loan Package:

Step 1: Log into the ACC Encompass Correspondent portal. www.acccorrespondent.com

Login

[Click here to Log In](#)

LOGIN

User Name

☐ Internal User

☐ Remember Me

Continue

**DO NOT click
"Internal User"**



Uploading Conditions or Closed Loan Package

Click on TPO User, search for the LO and click on the LO Name.

TPO Contacts

Search By ▼ TPO User

TPO Company

TPO COMP

✓ TPO User

Step 2: Click on your pipeline and locate the loan you would like to upload conditions to and double click on the loan.

Pipeline

Channel ▼ Correspondent Non-Delegated View ▼ All Loans Loan Status ▼ Current

<input type="checkbox"/>	LOAN #	LENDER CASE #	ALTERNATE LOAN #	BORROWER NAME	PROPERTY ADDRESS	STATUS	LOCK & REQUEST STATUS
<input type="checkbox"/>	332506660	222505574				File Started	Unlocked
<input type="checkbox"/>	132507014	222505574		Test Non-Del, Test Non-Del		File Started	Unlocked



Uploading Conditions or Closed Loan Package

Step 3: Click on the “Documents” tab and upload all conditions into the “Unassigned” section.

NOTE: Splitting out documents and labeling according to the condition will result in a faster review time through processing.

The screenshot displays the ACCMortgage web application interface. On the left is a dark blue sidebar with a menu containing: Loan Summary, URLA 2020, Product Pricing & Lock, Documents (highlighted with a red box), Submit for Non-Delegated Review, Conditions, Purchase Advice, and Withdraw Loan. The main content area has a white background. At the top, it says 'Documents Tab: Please upload all documents to the [Unassigned] section.' Below this, it says 'Conditions Tab: 1. Review Conditions 2. Upload supporting documents directly to the [Unassigned] section on the Documents Tab. 3. Click the "Notify Lender" button'. A section titled 'All Borrowers' contains a dropdown menu with '[UNASSIGNED]' selected (highlighted with a red box). To the right of the dropdown is a 'Drag & Drop files here or' area with a green 'Browse for files' button (highlighted with a red box). Above the dropdown and drag area are buttons for 'Expand All', 'Collapse All', 'Add Document', and 'Print Fax Cover Sheet'. At the bottom right of the drag area are download and upload icons.



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Step 4: Once a document is uploaded, the conditions box below will populate each time.

- Click “ready for review” on the condition you are uploading
- Click “Ok” and then continue to upload any additional documents
(The “OK” button will NOT notify ACC of items uploaded)
- Once you are finished uploading click “Notify Lender”
(Failing to complete this step will result in the conditions not being submitted to processing for review)

Condition	Ready for Review
Assets: Entity Documents	<input checked="" type="checkbox"/>
Assets: Gift Receipt to Borrower	<input type="checkbox"/>
Assets: Large Deposit(s)	<input type="checkbox"/>

Buttons: Cancel, Notify Lender, Ok

NOTE: The “notify lender” button can also be located under the “Conditions” tab.

Congratulations, you have submitted your conditions to ACC Mortgage!