

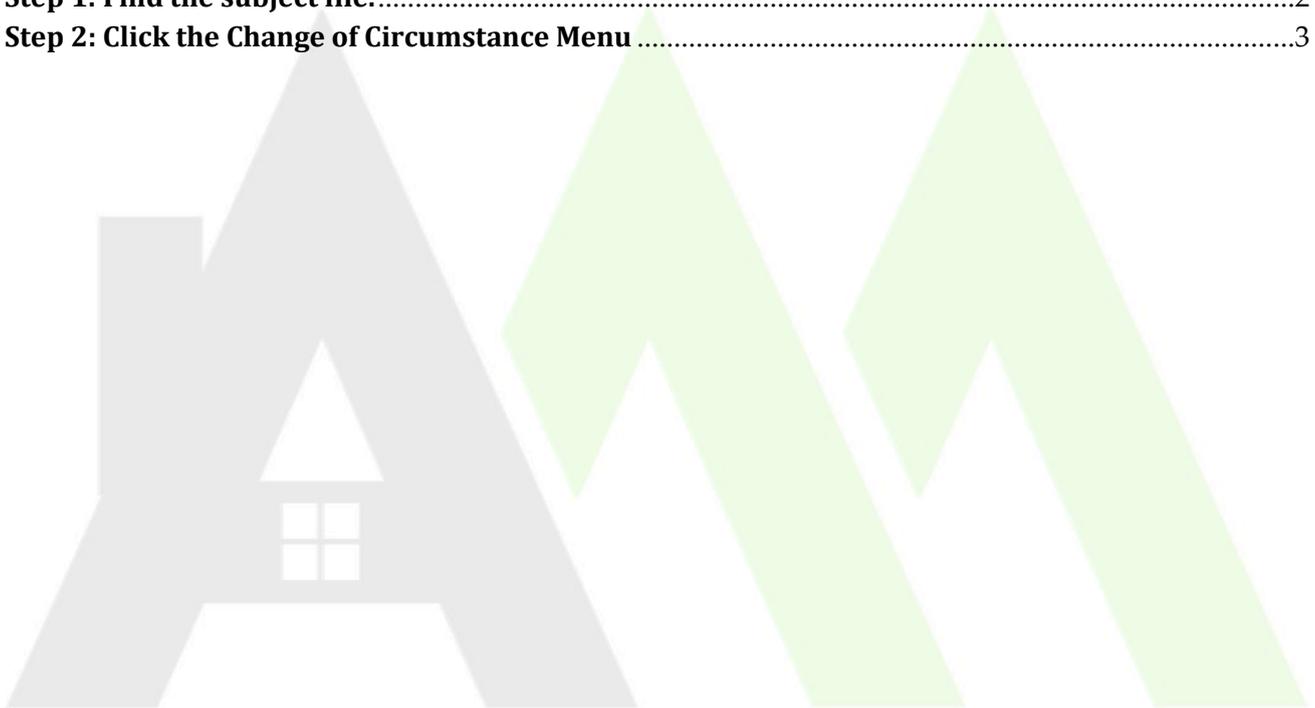
# How to do COC through TPO Portal

Thank you for choosing AAA LENDINGS. It is our goal to provide you with the best possible service. Please use this guide to help with the loan process about how to do COC through TPO Portal.

If you have any questions, please contact your Account Executive or Loan Coordinator. ([wholesaleprocessing@aaalendings.com](mailto:wholesaleprocessing@aaalendings.com)).

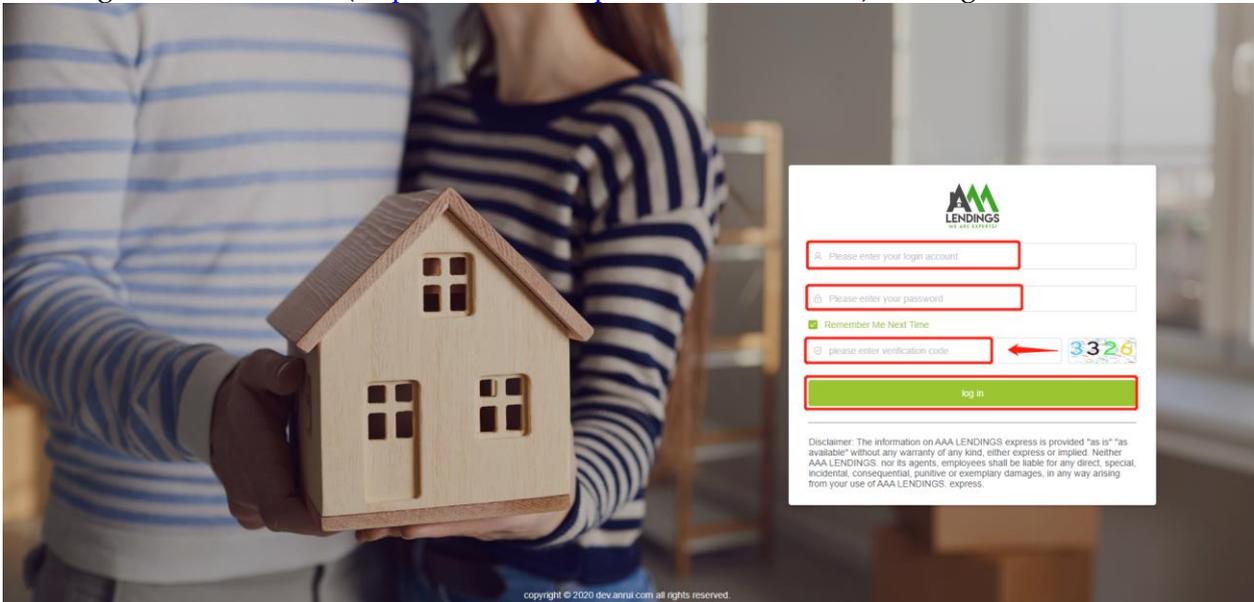
Note: If you do not know how to submit the COC request or fail to submit, you can also email COC to Loan Coordinator [wholesaleprocessing@aaalendings.com](mailto:wholesaleprocessing@aaalendings.com) for help.

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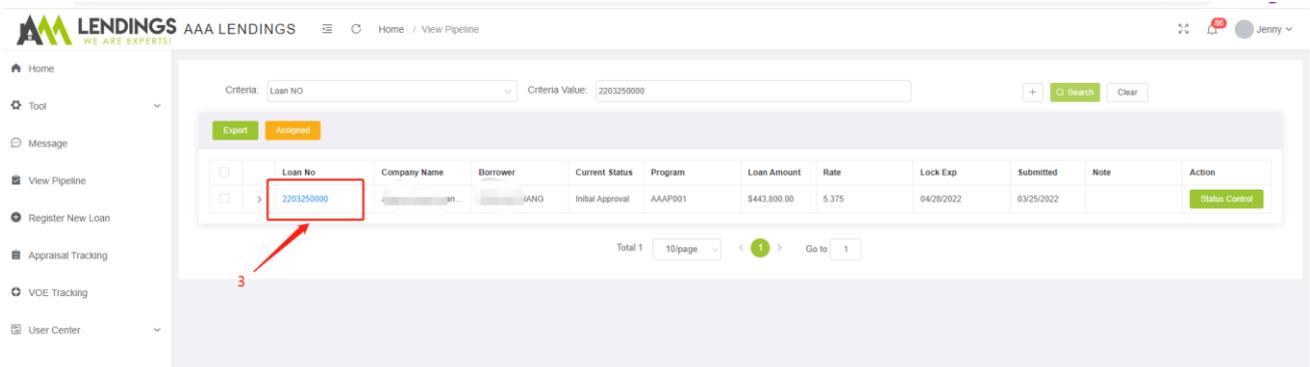
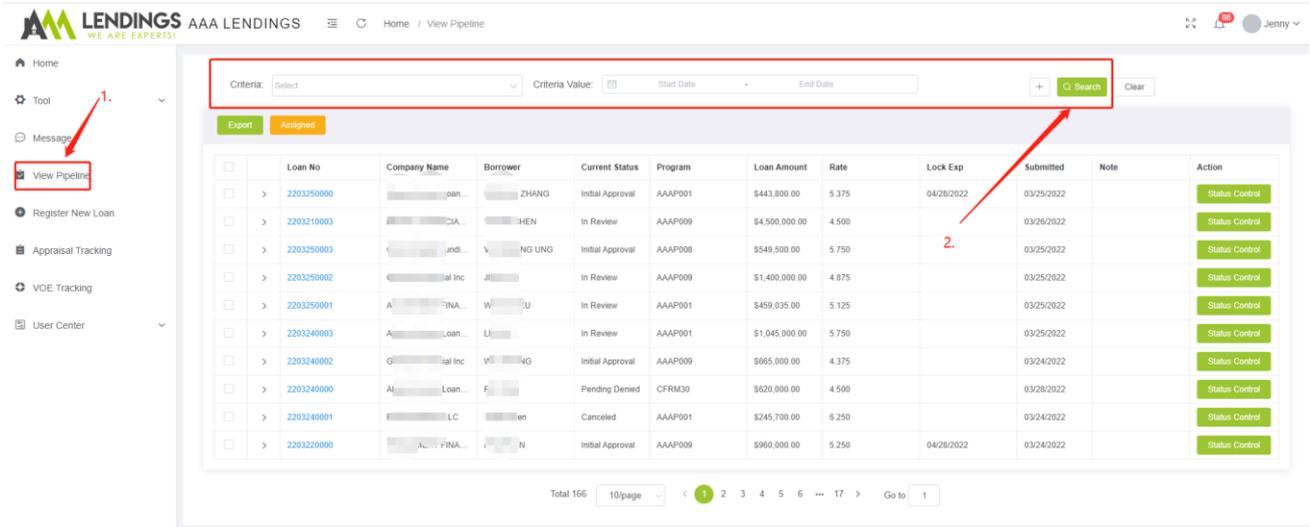


## Step 1: Find the subject file.

1. Navigate to TPO Portal (<https://main.aacapitalinvestment.com>) and login.

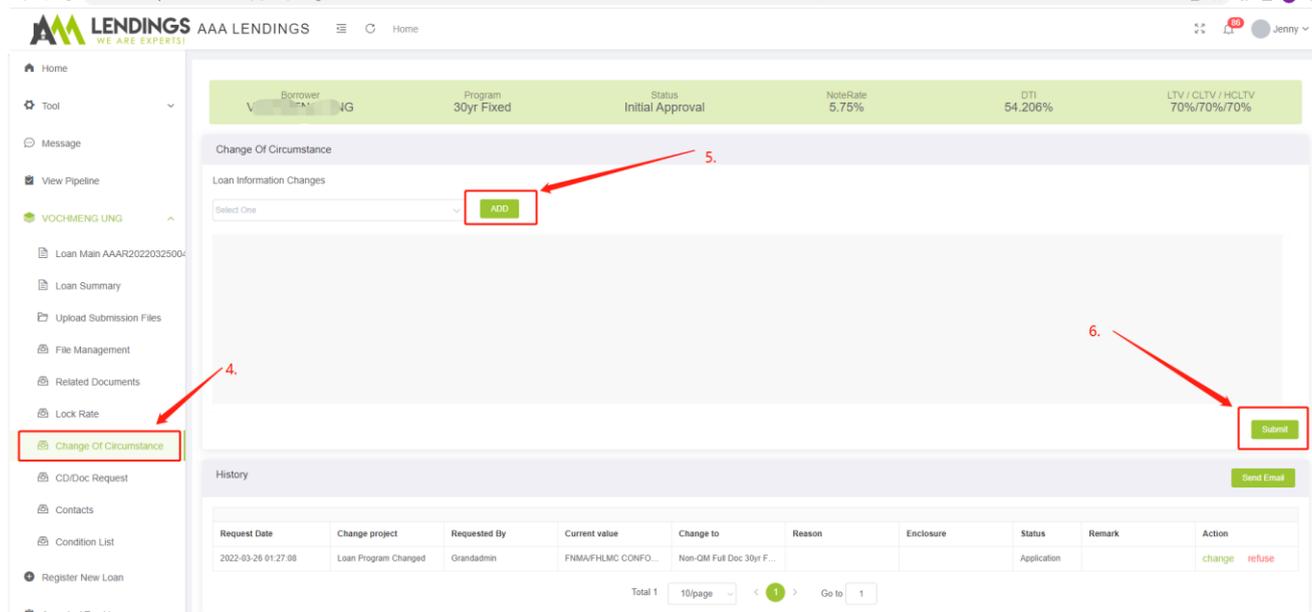


2. Click **“View Pipeline”** and search the subject file by some criteria, such as Loan No. Borrower, or Subject address, then click this file to enter the detailed loan case information page.



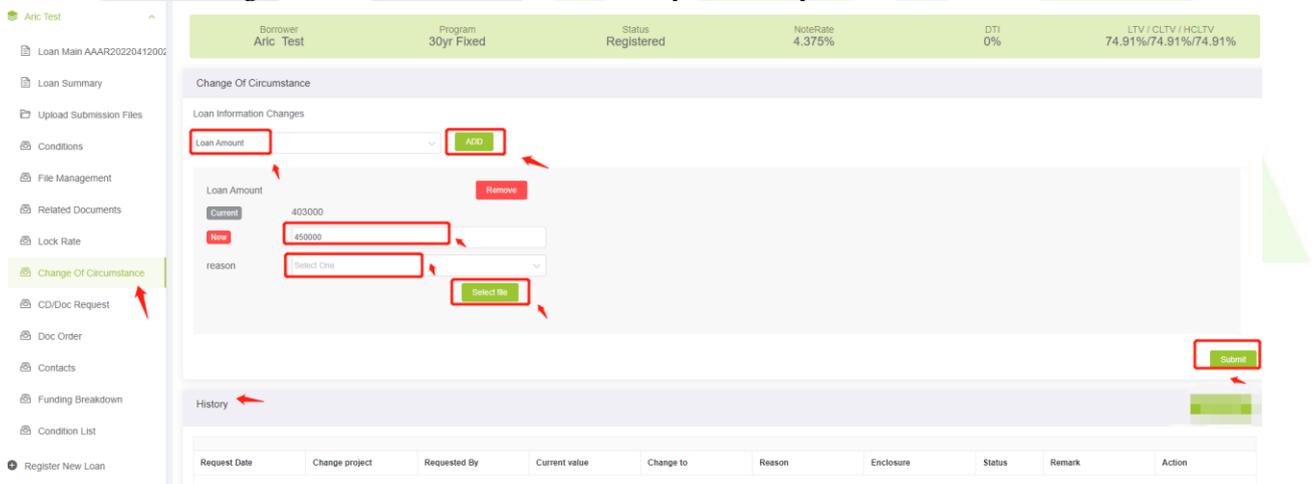
## Step 2: Click the Change of Circumstance Menu

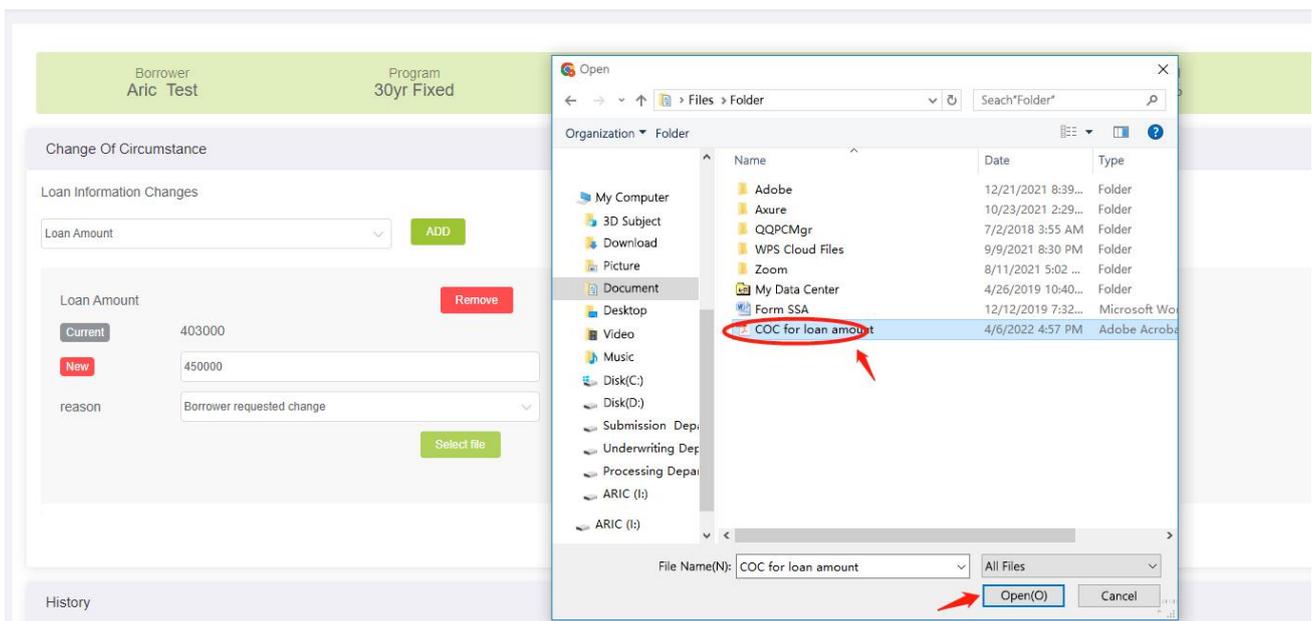
1. Find and click “Change of Circumstance” from the left navigation panel.



2. Add the “Loan Information Changes”, follow 5-6 showing on the above picture. There is a sample described below.

Such as Change loan amount. You should select changed items from dropdown list, herein, we select “Loan Amount” and click “Add” button. Next, you input the “New” value and select “reason” from the dropdown list. When you complete this, please click “Select File” to upload COC document. Finally, you need to click “Submit” button for submitting this request for COC about loan amount changed, and this COC will be in the history list and you can find its status.





The screenshot displays the 'Change Of Circumstance' interface for Borrower 'Aric Test' and Program '30yr Fixed'. The 'Loan Information Changes' section includes a 'Loan Amount' dropdown menu with an 'ADD' button. Below this, there are input fields for 'Current' (403000), 'New' (450000), and 'reason' (Borrower requested change), along with 'Remove' and 'Select file' buttons. An 'Open' file dialog box is overlaid on the screen, showing a list of files and folders. The file 'COC for loan amount' is selected and highlighted in blue. A red circle is drawn around the file name, and a red arrow points to it. Another red arrow points to the 'Open(O)' button at the bottom of the dialog box. The file name 'COC for loan amount' is also visible in the 'File Name(N):' field at the bottom of the dialog.

Organization	Folder	Name	Date	Type
My Computer		Adobe	12/21/2021 8:39...	Folder
		Axure	10/23/2021 2:29...	Folder
		QQPCMgr	7/2/2018 3:55 AM	Folder
		WPS Cloud Files	9/9/2021 8:30 PM	Folder
		Zoom	8/11/2021 5:02 ...	Folder
		My Data Center	4/26/2019 10:40...	Folder
		Form SSA	12/12/2019 7:32...	Microsoft Wo...
		COC for loan amount	4/6/2022 4:57 PM	Adobe Acrobat

