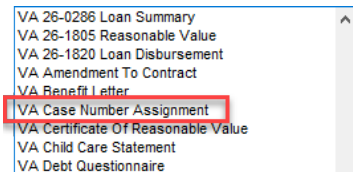


Document Placeholder:

- We now have a document placeholder for **VA Case Number Assignment**



Exporting a Brokered Loan from Encompass:

- When exporting a brokered loan file, go to your pipeline and follow the steps listed below:

Pipeline View Branch Manager - All

Loan Folder: 4 folders are selected | Include Archive Loans | View: All Loans | Company: Internal Organization | All | Global Search

Filter: Loan Number contains "2466"

1 of 1

Alerts	Mess	Linked	Loan Number	Borrower Nam	File Start Date	Loan Amount	Note R	TPO Un	Last Finished Milest	Ne
			2466							
			2000002466	America	10/15/2006	407,500.00				

Right-click context menu options:

- New Loan...
- Edit Loan...
- Duplicate Loan...
- Move to Folder
- Refresh
- Export to Excel
- Print Forms...
- Manage Alerts...
- eFolder Documents
- Open Web View
- GSE Services**
 - Freddie Mac Loan Assignment
 - Freddie Mac LPA Batch
 - Fannie Mae UCD Transfer
 - Export ULAD (DU MISMO 3.4)**
 - Export iLAD (MISMO 3.4)
- Bid Tape
- Properties...
- Select All on This Page

Income Analyzer Troubleshooting Tip:

- If the Income Analyzer is not reading documents that have been uploaded, you can troubleshoot by deleting the document and re-uploading to a new folder. This can occur if a document bucket has been deemed invalid by IA.

Post Closing Encompass Placeholders:

- Branches, please do not use the following placeholders (these are reserved for Post Closing team)

Placeholder Name:**Intended for:**

Final Document Transmittal
closing (investor/ shipping info)

Documents received *after*

Title Report
closing (Final Title Policy)

Documents received *after*

Insurance Application Results
application

FHA mortgage insurance

Investor Suspense

Investor suspense conditions

Notice of Assignment, Sale or Transfer of Servicing

Goodbye Letter

Payment History

Payment history (*post-close*)

Post Closing – Other

Misc. post-closing docs

Purchase Advice

Investor loan purchase docs

RD 3555-17 Loan Note Guarantee

USDA insurance certificate

Servicing – Other

Misc. servicing docs

VA Loan Guaranty Certificate

VA insurance certificate

Reminders:**Project Type:**

Review the 1003 URLA Lender screen and confirm the Project Type. This should be completed properly on each loan as it affects your pricing, riders, etc.

Please also make sure you are unchecking the “property is not located in a project” on all loans.

Project Type
Please select at least one.

☐ Condominium ☒ Planned Unit Development (PUD)
☐ Cooperative ☐ Property is not located in a project

Attachment Type:
Property Type:
Project Design Type:

Annotation: A red arrow points to the 'Property is not located in a project' checkbox with the text: uncheck 'Property is not located in a project'

Request for Transcript of Tax:

- Before ordering disclosures, it's best practice to double check the Forms > Request for Transcript of Tax screen to confirm your borrower data is accurate.

Tip: The Copy from Borrower Summary quickly copies all your borrower data into this screen.

Request Details ☐ Default to TQL Rules

Tax Form is for: **Copy from Borrower Summary**
4506-C Oct 2022

1a. Name shown first on tax form
First Name Middle Initial Last Name
Authorized Signer

1b. 1st SSN on form or Employer ID #
☐ Use Employer ID Format
☐ Authorized Representative Signing

1c. Previous name shown on last return filed if different from 1a
First Name Middle Initial Last Name

2a. Spouse's name shown on tax form, if joint return. 2b. 2nd Social Security # on form
First Name Middle Initial Last Name
Authorized Signer
☐ Use Employer ID Format
☐ Authorized Representative Signing

2c. Spouse's previous name shown on last return filed if different from 2a
First Name Middle Initial Last Name

3. Current name, address (including apt., room, suite #), city, state, Zip
First Name Address
Last Name City
State Zip

4. Address shown on last filed return, if different from line 3
Address
City
State Zip

Forms Tools Services
MM Borrower Summary - Origination
FHA Management
1003 URLA - Lender
1003 URLA Part 1
1003 URLA Part 2
1003 URLA Part 3
1003 URLA Part 4
1003 URLA Continuation
HUD 1003 Addendum
MM Prequal letter
2015 Itemization
RegZ - LE
Loan Estimate Page 1
Loan Estimate Page 2
Loan Estimate Page 3
Request for Transcript of Tax

New & Updated Training Aids:

- 2015 Itemization Fee Quick Reference
- CD Presumed Received Date vs. Actual Received Date
- Encompass – Mortgage Insurance Single Premium
- Encompass Broker Loans
- Encompass Export Loan