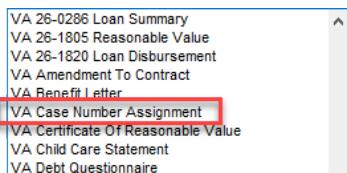


### **Document Placeholder:**

- 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:

**Go to the pipeline and find your loan.**

**Highlight loan and right click.**

**Select "GSE Services" and Export ULAD (DU MISMO 3.4)**

**Then save in desired folder.**

**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)

### **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:**

[Final Document Transmittal](#)  
*closing* (investor/ shipping info)

[Title Report](#)  
*closing* (Final Title Policy)

[Insurance Application Results](#)  
application

[Investor Suspense](#)

[Notice of Assignment, Sale or Transfer of Servicing](#)

[Payment History](#)

[Post Closing – Other](#)

[Purchase Advice](#)

[RD 3555-17 Loan Note Guarantee](#)

[Servicing – Other](#)

[VA Loan Guaranty Certificate](#)

#### **Intended for:**

Documents received *after*

Documents received *after*

FHA mortgage insurance

Investor suspense conditions

Goodbye Letter

Payment history (*post-close*)

Misc. post-closing docs

Investor loan purchase docs

USDA insurance certificate

Misc. servicing docs

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.

<input type="checkbox"/> Condominium	<input checked="" type="checkbox"/> Planned Unit Development (PUD)
<input type="checkbox"/> Cooperative	<input type="checkbox"/> Property is not located in a project
Attachment Type	Detached
Property Type	PUD
Project Design Type	

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: Borrower

4506-C Oct 2022

1a. Name shown first on tax form      1b. 1st SSN on form or Employer ID #

First Name <input type="text"/>	Use Employer ID Format <input type="checkbox"/>
Middle Initial <input type="text"/>	Authorized Representative Signing <input type="checkbox"/>
Last Name <input type="text"/>	
Authorized Signer <input type="text"/>	

1c. Previous name shown on last return filed if different from 1a

First Name <input type="text"/>	Middle Initial <input type="text"/>	Last Name <input type="text"/>
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2a. Spouse's name shown on tax form, if joint return. 2b. 2nd Social Security # on form

First Name <input type="text"/>	Use Employer ID Format <input type="checkbox"/>
Middle Initial <input type="text"/>	Authorized Representative Signing <input type="checkbox"/>
Last Name <input type="text"/>	
Authorized Signer <input type="text"/>	

2c. Spouse's previous name shown on last return filed if different from 2a

First Name <input type="text"/>	Middle Initial <input type="text"/>	Last Name <input type="text"/>
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3. Current name, address (including apt., room, suite #), city, state, Zip

First Name <input type="text"/>	Address <input type="text"/>
Last Name <input type="text"/>	City <input type="text"/>
	State <input type="text"/> Zip <input type="text"/>

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

Address <input type="text"/>
City <input type="text"/>
State <input type="text"/> Zip <input type="text"/>

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  
MI 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