Encompass Applications

Adding a Borrower to an Application

To add a borrower, you will start by opening the manage borrower screen.

You can add the co-borrower by filling in their name and social.

Adding a Borrower to the Application

Once the information is filled in, you can press close, and their name will appear along with the borrowers.

You will need to go into the URLA and complete the co-borrowers information

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Adding a Borrower Pair

On the Tools Tab, click Co-Mortgagors
Click the new icon, add borrower pair.

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Adding a Borrower Pair

The new borrower pair is displayed on the screen.
Type the information in the borrower section and then click close to return to the loan.
The borrower will now appear in the drop down to choose.
You can then proceed with entering the remaining application information.

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Duplicating a Loan

**Click to select the loan on your pipeline, and then click the Duplicate icon.
You can also right click on your pipeline and click duplicate loan.**

Duplicating a Loan

Once you have clicked on duplicate loan, you need to list what folder you would like loan in and the template.
Once your loan is duplicated, it will ask you if you would like to open the loan now.

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Duplicating a Loan

Once you choose to open the new loan, it will ask you to apply a template set.
Then you will select the template you need. You will complete this from the loan tab.
Once selected, proceed with editing the application and adding any documents to the loan.

Keep in mind, when you duplicate a loan, the only thing that carries over is the data. You will need to upload all documents to the new loan.

Flip the Borrower and Co-Borrower within a Pair

Open the Manage Borrowers tool:

The Manage Borrowers window opens with the primary borrower at the top of the Borrower Pairs list. The borrower pair at the top of the list is always the primary borrower associated with the loan.

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Flip the Borrower and Co-Borrower within a Pair

On the Manage Borrowers window, select the borrower pair containing the borrower and co-borrower to be switched, and then click Move.

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Flip the Borrower and Co-Borrower within a Pair

Once move is selected, a dialog box will open.
You will choose the borrower position to swap and click move.
Then the information will be swapped, and the name of the new borrower displays in the borrower's pair section.

Deleting an Individual Borrower from an Application

You will start by pressing the manage borrowers icon.

This will open up the manage borrowers dialog box.

Deleting an Individual Borrower

Within the Manage Borrowers, you will select what borrower you would like to delete. Then you will press the Delete Borrower button.
It will ask you confirm that you want to delete, pressing yes will remove the borrower.

Deleting a Borrower Pair

In order to delete a 2nd pair on the application, you will need to use the borrower drop down and press the manage borrower's icon.
You will then highlight the borrower pair you wish to delete and press the Delete Borrower Pair.

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Deleting a Borrower Pair

You will then click, yes, and it will remove the 2nd borrower pair.

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