



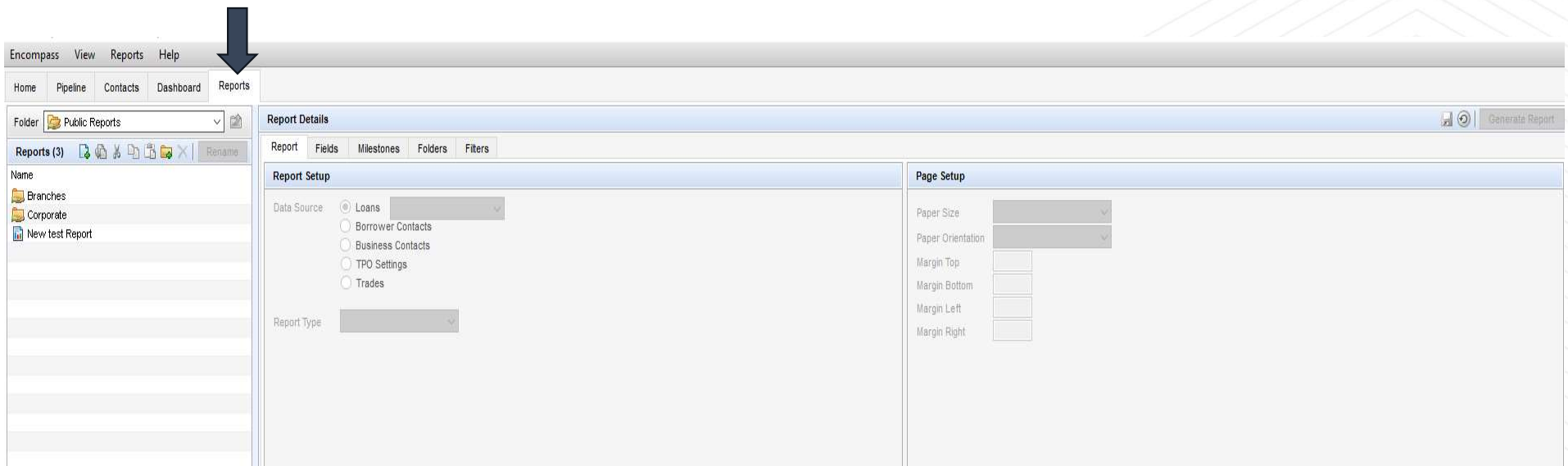
# Encompass Branch Reports



**M/I FINANCIAL, LLC**  
A Subsidiary of M/I Homes, Inc.

# Branch Reports

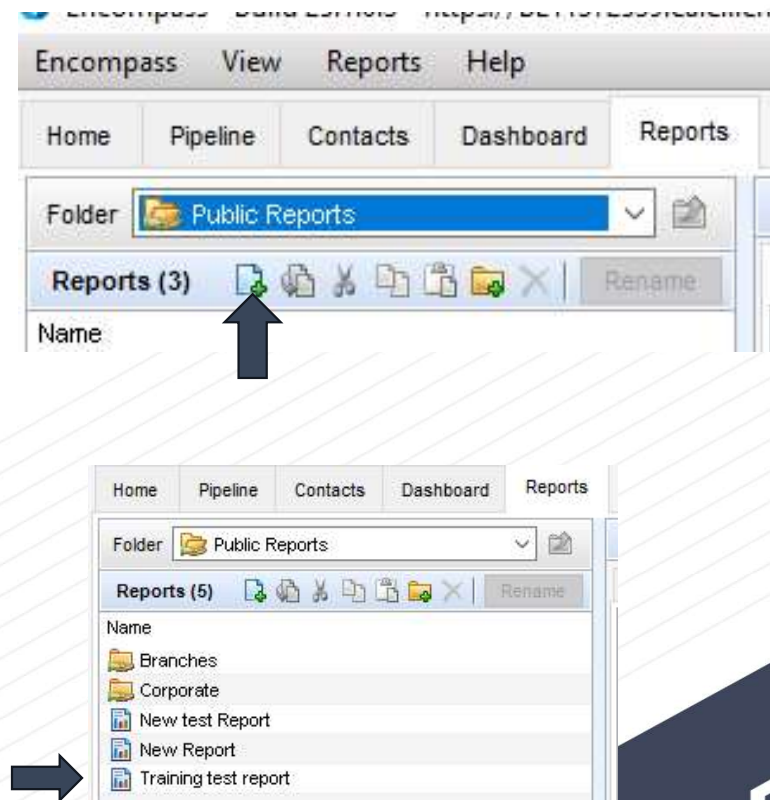
To access branch reports, you will view through your reports tab.



# Branch Reporting – Creating a New Report

In reports you will want to use the plus sign in order to establish a new report.

Encompass will add a new report. You can rename it to your needs. You will just need to double click in the name in order to change the name of the report.



# Branch Reporting – Creating a New Report

The screenshot displays the Encompass software interface for creating a new report. The main window is titled "Training test report" and features a sidebar on the left with a folder tree. The "Public Reports" folder is expanded, showing subfolders: "Branches", "Corporate", "New test Report", "New Report", and "Training test report". The "Training test report" folder is selected. The main area is divided into two panes: "Report Setup" and "Page Setup". The "Report Setup" pane shows the "Data Source" set to "Loans" (with "Internal Organization" selected) and "Report Type" set to "Table". The "Page Setup" pane shows "Paper Size" set to "Letter", "Paper Orientation" set to "Portrait", and "Margin Top", "Margin Bottom", "Margin Left", and "Margin Right" all set to "1". A "Generate Report" button is visible in the top right corner of the main area.

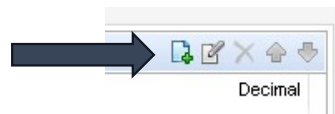
The reporting area has several filters on fields you may want to use as apart of your reporting folder.

# Branch Reporting – Obtaining Fields

Training test report

Report Fields Milestones Folders Filters

Description	Pair	Field	Sorting	Summary	Decimal
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Field Properties

Select a Field Type ☒ Encompass Field ☐ Excel Calculation Field

Field ID

Field Description

Borrower Pair

Sorting Order for this Field

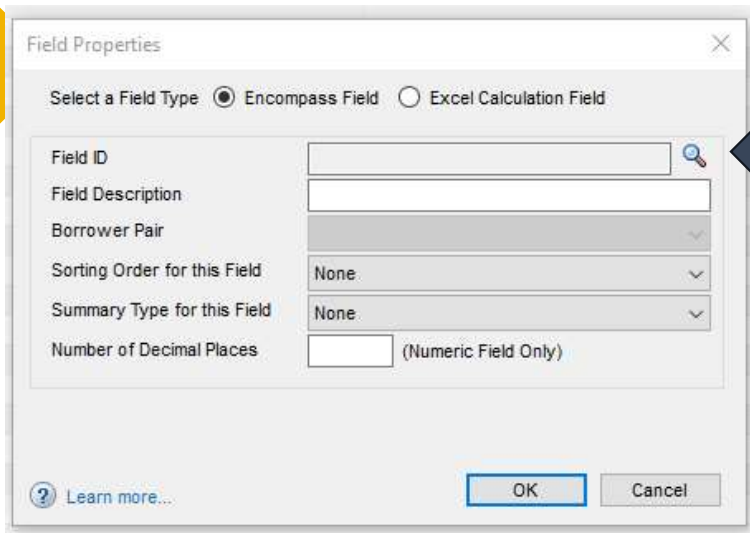
Summary Type for this Field

Number of Decimal Places  (Numeric Field Only)

Learn more... OK Cancel

You will want to start your individual report by adding new fields to your report. Utilizing the Plus sign, it will bring you to field properties to narrow down your selection.

# Branch Reporting – Obtaining Fields



The Field Properties dialog box is shown with the 'Encompass Field' radio button selected. It contains fields for Field ID, Field Description, Borrower Pair, Sorting Order for this Field, Summary Type for this Field, and Number of Decimal Places. A magnifying glass icon is located to the right of the Field ID field, with an arrow pointing to it from the 'Select Field' dialog box.

Field Properties

Select a Field Type ☒ Encompass Field ☐ Excel Calculation Field

Field ID

Field Description

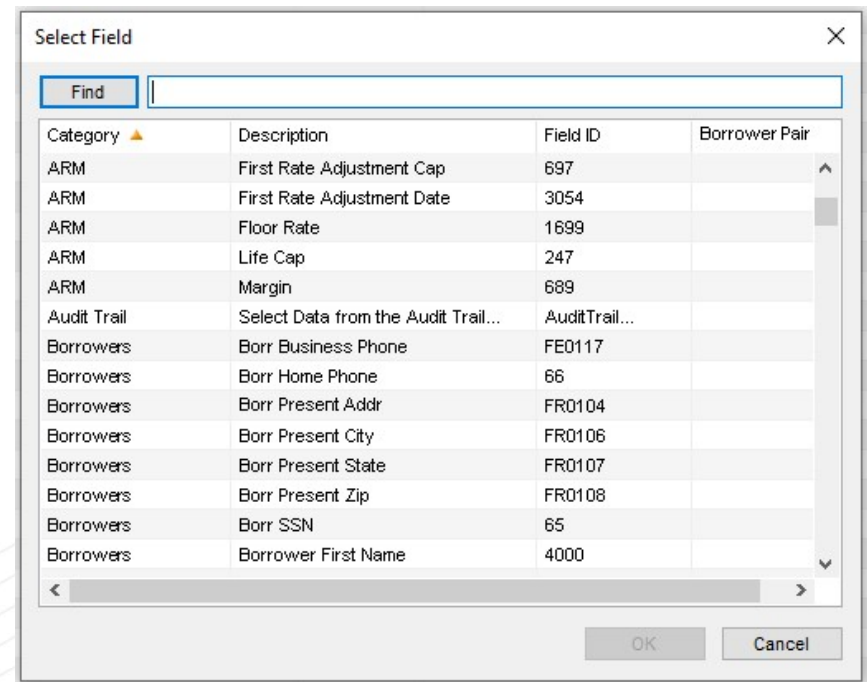
Borrower Pair

Sorting Order for this Field

Summary Type for this Field

Number of Decimal Places  (Numeric Field Only)

[Learn more...](#) OK Cancel



The Select Field dialog box is shown with a search bar and a table of fields. The table has columns for Category, Description, Field ID, and Borrower Pair. The 'Find' button is highlighted.

Select Field

Find

Category	Description	Field ID	Borrower Pair
ARM	First Rate Adjustment Cap	697	
ARM	First Rate Adjustment Date	3054	
ARM	Floor Rate	1699	
ARM	Life Cap	247	
ARM	Margin	689	
Audit Trail	Select Data from the Audit Trail...	AuditTrail...	
Borrowers	Borr Business Phone	FE0117	
Borrowers	Borr Home Phone	66	
Borrowers	Borr Present Addr	FR0104	
Borrowers	Borr Present City	FR0106	
Borrowers	Borr Present State	FR0107	
Borrowers	Borr Present Zip	FR0108	
Borrowers	Borr SSN	65	
Borrowers	Borrower First Name	4000	

OK Cancel

You will use the search/find field ID button to look up the description of the field you would like to add.

# Branch Reporting – obtaining fields

You can search by field number or description.

Select Field

Find

Category ▲	Description	Field ID	Borrower Pair
ARM	First Rate Adjustment Cap	697	
ARM	First Rate Adjustment Date	3054	
ARM	Floor Rate	1699	
ARM	Life Cap	247	
ARM	Margin	689	
Audit Trail	Select Data from the Audit Trail...	AuditTrail...	
Borrowers	Borr Business Phone	FE0117	
Borrowers	Borr Home Phone	66	
Borrowers	Borr Present Addr	FR0104	
Borrowers	Borr Present City	FR0106	
Borrowers	Borr Present State	FR0107	
Borrowers	Borr Present Zip	FR0108	
Borrowers	Borr SSN	65	
Borrowers	Borrower First Name	4000	

OK Cancel

Select Field

Find

Category ▲	Description	Field ID	Borrower Pair
Database	Application Date	745	
Database	Application Taken By	479	
Database	Appraisal Co Email	89	
Database	APR	799	
Database	ATR QM - Eligibility - Ability-to-R...	QM.X23	
Database	ATR QM - Eligibility - Is Loan Elig...	QM.X25	
Database	AUS #1	HMDA.X44	
Database	AUS #2	HMDA.X45	
Database	AUS #3	HMDA.X46	
Database	AUS #4	HMDA.X47	
Database	AUS #5	HMDA.X48	
Database	AUS Recommendation #1	HMDA.X50	
Database	AUS Recommendation #2	HMDA.X51	
Database	AUS Recommendation #3	HMDA.X52	

OK Cancel



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# Branch Reporting – Field ID

The screenshot shows a form for entering borrower and co-borrower information. The 'Borrower' section is active, showing fields for Vesting Type (Individual), First Name (Florida), Middle, Last Name (Davis), Suffix, SSN (111-11-1111), DOB (12/12/1988), and Marital Status (Married). A tooltip is displayed over the First Name field, stating '4000: The borrower's first name.' The 'Co-Borrower' section is also visible but empty. At the bottom, there are checkboxes for 'Preferred Contact Method - Select All That Apply'.

If you want to find a field number in encompass, hover over the area or you can do ctrl+G to locate the field id. Input the field number into the find button, and it will bring up the description for you to pick and press ok.

The 'Select Field' dialog box is open, showing a list of fields. The 'Find' field contains '4000'. The list has four columns: Category, Description, Field ID, and Borrower Pair. The first row is selected, showing 'Borrowers' as the category, 'Borrower First Name' as the description, and '4000' as the field ID. The 'OK' button is highlighted.

Category	Description	Field ID	Borrower Pair
Borrowers	Borrower First Name	4000	
Borrowers	Borrower First/Middle Name	36	
Borrowers	Borrower Last Name	4002	
Borrowers	Borrower Last Name/Suffix	37	
Borrowers	Borrower Middle Name	4001	
Borrowers	Borrower Suffix Name	4003	
Borrowers	Co-Borr SSN	97	
Borrowers	Co-Borrower First Name	4004	
Borrowers	Co-Borrower First/Middle Name	68	
Borrowers	Co-Borrower Last Name	4006	
Borrowers	Co-Borrower Last Name/Suffix	69	
Borrowers	Co-Borrower Middle Name	4005	
Borrowers	Co-Borrower Suffix Name	4007	
Company	Broker Lender Addr	319	



# Branch Reporting – Creating Fields

Select Field

Find 4000

Category	Description	Field ID	Borrower Pair
Borrowers	Borrower First Name	4000	
Borrowers	Borrower First/Middle Name	36	
Borrowers	Borrower Last Name	4002	
Borrowers	Borrower Last Name/Suffix	37	
Borrowers	Borrower Middle Name	4001	
Borrowers	Borrower Suffix Name	4003	
Borrowers	Co-Borr SSN	97	
Borrowers	Co-Borrower First Name	4004	
Borrowers	Co-Borrower First/Middle Name	68	
Borrowers	Co-Borrower Last Name	4006	
Borrowers	Co-Borrower Last Name/Suffix	69	
Borrowers	Co-Borrower Middle Name	4005	
Borrowers	Co-Borrower Suffix Name	4007	
Company	Broker Lender Addr	319	

OK Cancel

Field Properties

Select a Field Type ☒ Encompass Field ☐ Excel Calculation Field

Field ID 4000

Field Description Borrower First Name

Borrower Pair 1st

Sorting Order for this Field None

Summary Type for this Field None

Number of Decimal Places (Numeric Field Only)

Learn more... OK Cancel

Field Properties

Select a Field Type ☒ Encompass Field ☐ Excel Calculation Field

Field ID 4000

Field Description First Name

Borrower Pair 1st

Sorting Order for this Field None

Summary Type for this Field None

Number of Decimal Places (Numeric Field Only)

Learn more... OK Cancel

Home Pipeline Contacts Dashboard Reports

Folder Public Reports

Reports (4)

Name

- Branches
- Corporate
- New test Report
- Training test report

Training test report

Report Fields Milestones Folders Filters

Fields

Description

First Name

Once you have selected the field and pressed ok, it will bring you to where you can edit your field description of the report. You can leave it as is or rename the field. Press okay, then it will become a field in your report.

# Branch Reporting – Creating a Report

The screenshot displays the 'Training test report' configuration in the M/I Financial system. The interface includes a sidebar with a folder tree (Public Reports, Branches, Corporate, New test Report, Training test report) and a main panel with tabs for Report, Fields, Milestones, Folders, and Filters. The 'Fields' tab is active, showing a list of fields with their descriptions, pairs, field names, sorting orders, and summaries.

Description	Pair	Field	Sorting	Summary
Branch		CX.DIVISION	Ascending	Group
Loan #		364	None	Count
Last Name		4002	None	None
Loan Processor		LoanTeamMember.Name.Loan Processor	Ascending	Group
Loan Officer		LoanTeamMember.Name.Loan Officer	None	None
Application Date		745	None	None
Milestone Date - Processing		Log.MS.Date.Processing	None	None
Underwriting Approval Date		2301	None	None
Mortgage Loan Commitment Date		3094	None	None
# days		Excel Field	None	None
Underwriting Suspended Date		2303	None	None
Current Status Date		749	None	None
WHC?		CX.WHC.ENROLLMENT.DATE	None	None
Data when conditions are due on Notice of Incompleteness		CX.INCOMPLETE.DEADLINE	None	None
Next Expected Milestone		Log.MS.Stage	None	None
Underwriting Status		CX.UNDERWRITING.STATUS	None	None

You can create a report with the fields you have chosen, and it will show as apart of your description and field.

# Branch Reporting – Date specific

Generate Report

Insert AND/OR Parentheses View Filter

As apart of your reports, you can get date specific. You can apply filters to your specific report. To apply a filter, you will just need to press the add sign and select the filters you will need.

Add/Edit Search Filter

Field: 748

Description: Closing Date

☐ Date is recurring (disregard the year).

Operator: Next 15 days

- Previous week
- Previous month
- Previous year
- Next week
- Next month
- Next year
- Last 7 days
- Last 15 days
- Last 30 days
- Last 60 days
- Last 90 days
- Last 180 days
- Last 365 days
- Next 7 days
- Next 15 days
- Next 30 days
- Next 60 days
- Next 90 days
- Next 180 days
- Next 365 days
- Is
- Is not
- Before
- On or before
- After
- On or after
- Date between
- Date not between
- Empty Date Field
- Non-empty Date Field

Add/Edit Search Filter

Field: 748

Description: Closing Date

☐ Date is recurring (disregard the year).

Operator: Date between

Minimum: 05/08/2025

and

Maximum: 06/08/2025

OK Cancel

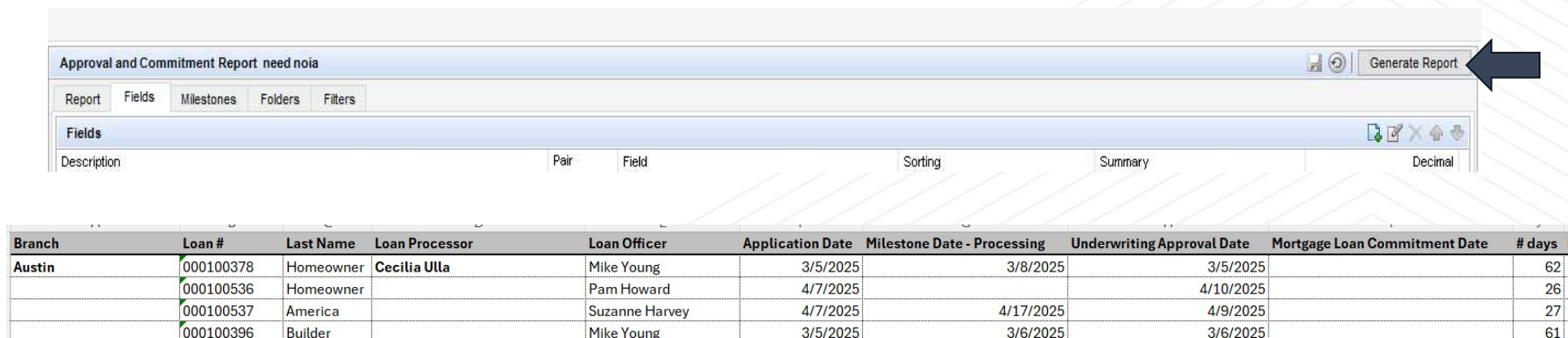
14 Days - need mktg spcl code, noia

Report	Fields	Milestones	Folders	Filters
Filters (4)				
(	Field	Operator	Value	)
	Application Date	Is	Last 365 days	Joint
	Underwriting Denied Da	Is	Non-empty Date Field	and
	Denial Mailed Date	Is	Empty Date Field	and
	Underwriting Approval D	Is	Empty Date Field	

# Branch Reporting – Generating a Report

Once you have your fields input, you will want to generate that report. The generate report button is on the top right of the screen.

The report will automatically generate into an excel spreadsheet for your review and editing.



Approval and Commitment Report need noia									
Generate Report									
Fields									
Description	Pair	Field	Sorting	Summary	Decimal				
Branch	Loan #	Last Name	Loan Processor	Loan Officer	Application Date	Milestone Date - Processing	Underwriting Approval Date	Mortgage Loan Commitment Date	# days
Austin	000100378	Homeowner	Cecilia Ulla	Mike Young	3/5/2025	3/8/2025	3/5/2025		62
	000100536	Homeowner		Pam Howard	4/7/2025		4/10/2025		26
	000100537	America		Suzanne Harvey	4/7/2025	4/17/2025	4/9/2025		27
	000100396	Builder		Mike Young	3/5/2025	3/6/2025	3/6/2025		61



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TransOhio Residential Title



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