**Encompass Processing Walkthrough Checklist**

**Follow these steps on a new loan file:**

* Go to pipeline: **Processor – Conditioned**
* Review the **Conversation Log** – Review Notes & Comments
* Go to the **M/I Borrower Summary Origination** Page and **1003 URLA** pages to review loan details
* Review **eFolder**:
  + Review documents & conditions
  + Open 1003, credit & AUS, income analyzer
  + Review documents received, requested, and determine if any additional items needed
* As you review/clear, you will link documents to conditions, annotate and add expiration dates, as needed.
* Review **UW conditions** and fill in any external conditions (these will print on the commitment letter)
* Add **Commitment conditions/blank conditions**, as needed. These conditions will need to be marked “prior to approval” and “external” to print on commitment letter.
* **eFolder**
  + Click **eDisclosures** to generate Commitment Letter
  + **Request** documents needed
* Add notes of intro call and create alerts for follow up on the **Conversation Log**
* Documents will auto-retrieve once uploaded to ECC by borrower. You will receive a message (viewable on pipeline). Review documents and link to conditions in **eFolder**, as needed.
* Rerun **AUS** as required
* Once updated – and have HOI, Lock, Close date and appraisal, click **Ready for CD** on the M/I Borrower Summary Origination screen
* Other Vendor Services Run Throughout Processing:
  + WVOE: Work number, Truework
  + AccountChek
  + DataVerify DRIVE
  + MI Center
  + Flood
  + Appraisal
  + Transcripts
  + Mavent (Compliance)

**Prior to finishing the Processing milestone for Conditional Review from Branch UW Processors must:**

* Run update **AUS** and **vendors (5-day items)**
* Pull current **transmittal**
* Add comments to **conversation log** as needed
* Clean up the **eFolder** (marking docs as current, attaching docs and conditions)
* Select the **UW** and **Finish** the **Processing Milestone**