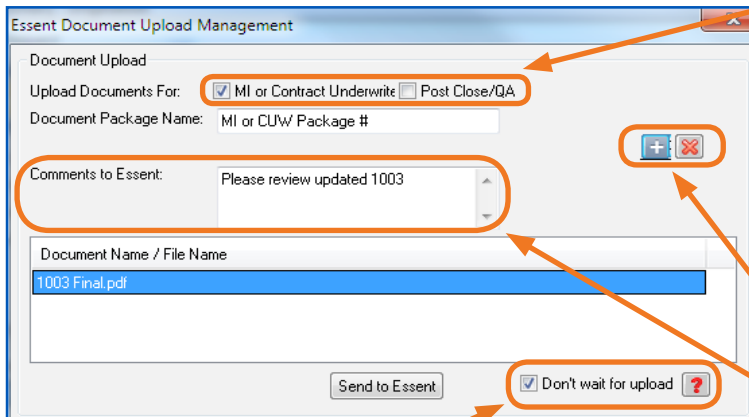**ESSENT**®

ESSENT USER TIP SHEET
Ellie Mae Encompass®

Seamless Document Upload

Essent Document Upload Management

If the documents are for underwriting the loan, check the **MI or Contract Underwriting** checkbox.

> If you are submitting documents after the loan has been activated, check the **Post Close/QA** checkbox.

The **Document Package Name** defaults to MI Package 1 for your initial document upload, MI Package 2 for your second package, and so on.
Note: You can change the Document Package Name to fit your needs.

Click on **+ icon** to select documents. Click on **X icon** to delete a specific document.
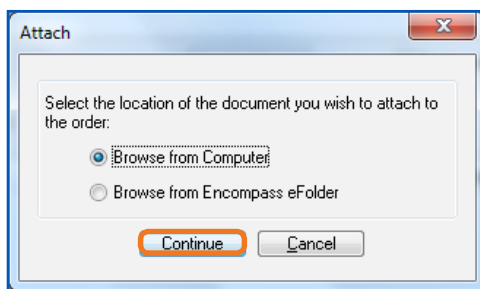
Enter comments to Essent's Underwriting Team.

Note: Maximum character length is 500 for the Comments to Essent.
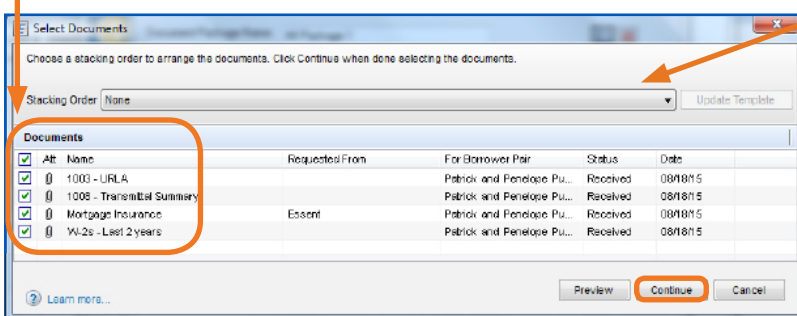
The **Don't wait for upload** checkbox will be checked. This allows you to continue processing other loans in Encompass while your document upload is in progress.

Note: Unchecking this box will require you to wait on this screen for the upload to finish. However, if an upload issue is experienced, this may be resolved by simply unchecking this box.

When you click on **+** the **Attach** window will open. Depending on where you keep your loan documents, select **Browse from Computer** or **Browse from Encompass eFolder** and click the **Continue** button.

- **Browse from Computer**: Select one or multiple documents at the same time and click Open.

- **Browse from Encompass eFolder**: From the **Select Documents** window, choose one document or multiple documents at the same time by clicking the check box.
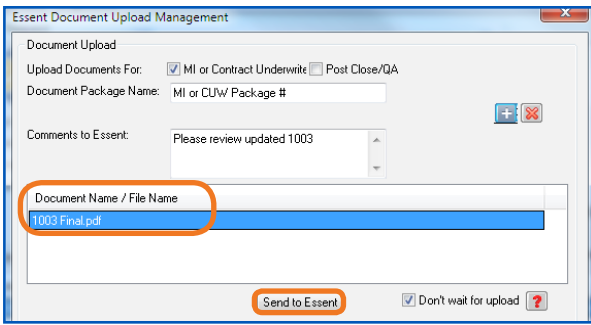

If your Super Admin has created Document **Stacking Orders**, you can select from among those listed or simply select the documents you wish to send from the Document list window.

Note: If you are using an Essent Stacking Order, documents listed as Required must be attached or you cannot click on Continue on the Select Documents window.
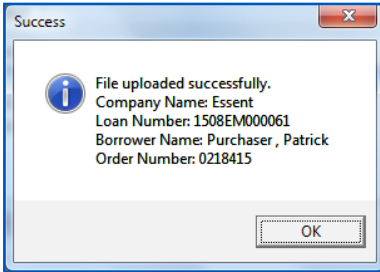
Click on **Continue** button.

In the **Essent Document Upload Management** window, the Documents selected will appear in the **Document Name/File Name** section.

When all documents have been added, click **Send to Essent**.

When your files have been uploaded to Essent, the **Success** window will appear.

You will also get an e-mail notification from Essent's Underwriting Team that your documents have been received.

You can view all your document uploads and/or Comments to Essent at any time by going to the **Check Status/View Result** tab and clicking on the **Direct Document Upload** button.
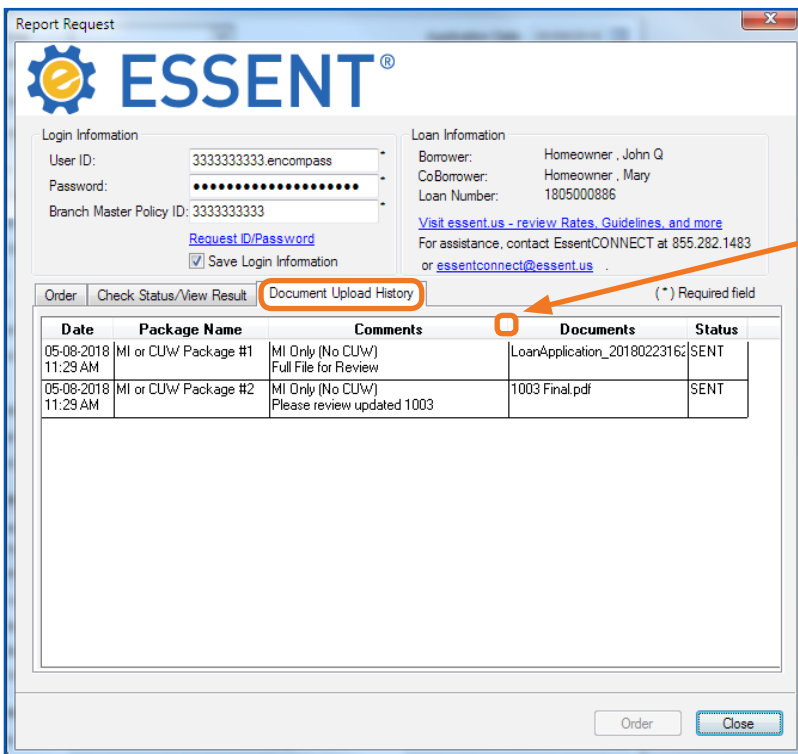
Your uploaded documents and comments history will appear on the **Document Upload History** tab.

Note: To view entire comment, either double click on the line to the right of the Comments header on the Document Upload History tab, or pull the line to the right.

To send additional documents to Essent, click on the **Direct Document Upload** button from the **Check Status/View Result** tab and follow the steps on Page 2.

However, if loan data changes after the initial Non-Delegated Order has been submitted, go to the **Order tab**, select **Resubmit Non-Delegated Order** in the **Request Type** dropdown and send corresponding documents to Essent by using the steps above.

Enter specifics regarding **loan data changes** in the **Comments to Essent** section on the **Essent Document Upload Management** window, **and** notify the Essent Underwriting team at underwriting@essent.us of the data changes made.

We Are Here to Assist You!

We are here to answer your questions Monday – Friday from 8:00 AM to 8:00 PM Eastern time. If you need assistance with Encompass, contact the EssentCONNECT team at essentconnect@essent.us or 855-282-1483. For rates, guidelines, loan status, scenarios or turn-times, contact our Underwriting team at underwriting@essent.us or 877-331-8311.