

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.

					_
Select Documents	And strategy		100	-	
Choose a stacking order to arrange the docu	menta. Click Continue when done a	electing the documents.			
Stacking Order None	Update Template				
Documents					1
Att Name	Requested From	For Borrower Pair	Status	Date	
① 1003 - URLA ③		Patrick and Penelope Pu	Received	08/18/15	
🗹 🕼 1008 - Transmittel Summery		Patrick and Penelope Pu	Received	08/18/15	
Ø Mortgage Insurance	Essent	Patrick and Penelope Pu	Received	08/18/15	
🕑 🕼 W-2s - Lest 2 years		Patrick and Penelope Pu	Received	08/18115	
					_
② Learn more		P	review	Continue Cancel	
L					_

 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.

Mortgage insurance provided by Essent Guaranty, Inc.

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Essent Document Upload Management		In the Essent Document Upload Management window, the Documents selected will appear in the Document Name/File Name section.
Comments to Essent: Please review updated 1003	Don't wait for upload 😰	When all documents have been added, click Send to Essent .
Success	When your files You will also ge documents hav	s have been uploaded to Essent, the Success window will appear. It an e-mail notification from Essent's Underwriting Team that your e 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.

Report Request	
	Your uploaded documents and comments history will appear on the Document Upload History tab.
Login Information User ID: 333333333 encompass Password: Encode Borrower: Homeowner , Mary Branch Master Policy ID: 333333333 Encode CoBorower: Homeowner , Mary Loan Master Policy ID: 333333333 Encode CoBorower: Homeowner , Mary Loan Master Policy ID: 333333333 Encode CoBorower: Homeowner , Mary Loan Number: 1805000886 Visit essent us - review Rates. Guidelines, and more For assistance, contact EssentCONNECT at 855 282 1483 or essention-ettRessent UD For assistance, contact EssentCONNECT at 855 282 1483 or essention-ettRessent UD Order Check Status/View Result Document Upload History (*) Required field D5-08-2018 Mi or CUW Package #1 Mi Only (No CUW) LoanApplication_20180223162 [SENT] 11:23 AM Plackage water review updated 1003 1003 Final.pdf SENT	 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.
Order Close	

Enter specifics regarding **loan data changes** in the **Comments to Essent** section on the **Essent Document Upload Management** window, <u>and</u> notify the Essent Underwriting team at <u>underwriting@essent.us</u> 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 <u>essentconnect@essent.us</u> or 855-282-1483. For rates, guidelines, loan status, scenarios or turn-times, contact our Underwriting team at <u>underwriting@essent.us</u> or 877-331-8311.

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