

## 1. ON line Application

Have your customer go to:

<https://3595307040.mortgage-application.net/WebApp/FullAppLogin.aspx>

Please inform them to select your name from the drop down list.

Follow these instructions to retrieve and import this application into your Encompass loan origination system:

- Start Encompass and click on the Loan Mailbox button.
- You will see all of your messages, including applications that have been submitted to you.
- Click on the message and then click on the link to import the application data.

## 2. Agent E-Sign Documents

### 1. Click on link

<https://encompass.mortgage-application.net/encompassaccount/accountlogin.aspx>

Home > Encompass > Searching > Home Management

Housing Counselor List

Loan Estimate

Housing Counselor List

Your Home Loan Toolkit - Document

[Click here to sign the documents.](#)



click

If you experience problems opening the link, copy and URL:

<https://encompass.mortgage-application.net>

Please do not respond to this e-mail. This mailbox is r  
please contact your Encompass System Administrator

## Log In to the Loan Center

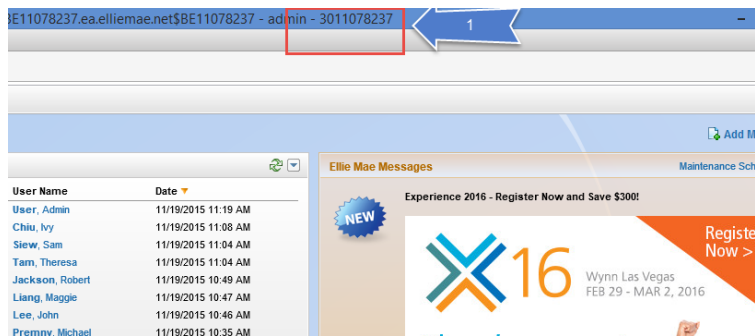
Please log in to sign eDisclosures that require your signature. You will need your Encompass User ID, and Encompass password to enter the system.

Client ID:  ← 1

User ID:  ← 2

Password:  ← 3

1 is found by looking at the top of your ENCOMPASS (3011078237)



2. is your login for encompass

3. Is your login password for encompass

### 3. Error during E Signing

Unfortunately this is a known EllieMae issue, from time to time files will get corrupt and current E sign vendor cannot catch the error in the transmission and results in an error. There are only 2 options to fix this issue:

a. have customer wet sign

b. re disclosure

In the next upgrade this will be corrected.

4. **Missing Email**

Please look into your “Clutter” in box and your “Junk Mail” inbox. I

5. **How do I transfer a file out of Prospect folder**

- a. Go the prospect folder
- b. highlight the loan you want to transfer
- c. select move folder to (from the drop down”
- d. Choose the folder you want it to go to ‘i.e. “my pipeline”

6. **Can you set me up with a “lender” login**

Typically you would use EPPS for pricing.



[Cheat\\_Sheet\\_for\\_pricing\\_using\\_Encompass.pdf](#) (991 kB)



[Cheat\\_Sheet\\_for\\_EPPS\\_-\\_Website.pdf](#) (868 kB)

1. These are 2 “how to” sheets prepaid by Leann to asset you on how to do pricing.

7. **How do I use Encompass:**

- a. I would suggest you go to encompass
- b. Select Help
- c. Select Tutorials from drop down
- d. Select from all the videos they have

Also you can download this great PowerPoint made by Crisiti

# Encompass Origination

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8. **Email issues.** When you log off the online Outlook you should always logoff, not just close you're the browser.
9. **Encompass is causing me issues.**

Most issues can be handled by restating your Encompass. It is highly recommended that every night you shut down your Encompass, this is the only way to receive updates for Software issues.
10. **Computer Security:**

Best practices state that all computers should be at logon screen when you away from your computer and your logon password should never be visible!

  - a. First; Right click on your desktop Select "Personalize"  
Select "Screen Saver"  
on the Wait: enter 5  
check Box next to On Resume, display logon screen  
Don't forget to click "APPLY"
  - b. Next;  
Hold down the "Windows Logo Key" and the letter "L" your computer should go to logon screen.  
So each time you step away from your desk "LOCK" your computer.

*Act like the personal information on your computer is yours!*

**11. What is the best way to get help**

Go to <https://gmccloan.assist.com/portal>

Sign up for a service account" It's free and you can get "Into the Know"