

## ENCOMPASS REMOTE ASSISTANT PACKAGE



Official Ellie Mae Pro  
Consulting Partner

### WORKING REMOTE HAS REQUIRED US ALL TO WORK A BIT DIFFERENTLY, ESPECIALLY WITHIN ENCOMPASS.

The Remote Assistant Package is a collection of tools to allow all Encompass users to work more efficiently remotely.

These tools improve communication within your team, allow progress to continue to be made while users are in a file, automatically make file updates and track file changes; which is so important for Underwriting and Closing right now.



### SANDBOX MODE

Allows user to work and run scenarios, even when someone else is in the loan file.

- Allows user to enter a loan in READ ONLY status and provides the user the ability to access a loan without exposure
- Allows user to make changes to the loan file to run various scenarios without having the ability to save any changes
- Ensures that changes to loan data are able to be made without effecting any of the loan attributes
- Flexibility to revise and run 'what if' scenarios in the loan file without the fear of saving



### AUTO ROLE ASSIGNMENT

This tool provides two key functions while working remotely:

- Allows the auto assignment of roles to a loan file based on predetermined rules so user can be alerted and automatically added to a loan file
- Automatically distributes loan files to users based on predetermined rules that you are able to manage. Easily assign by loan product, by role and by milestone



### KNOCK KNOCK TOOL

Easily communicate with your team when they are in a loan file and request them to exit the file so you may access it.

- Allows user to communicate directly from the Pipeline & request access to a loan currently being occupied by another user
- Users can send responses notifying others when they will be exiting a file
- Receive automatic notifications when the loan you were waiting to gain access to becomes available

# STIMULUS PACKAGES: ENCOMPASS REMOTE ASSISTANT PACKAGE



## SESSION MANAGER

With everyone working from home, no one wants Encompass to remain open by accident. The Encompass Session Manager automatically logs users out of either the Encompass smartclient or just the loan file at set time intervals to assist in files remaining open for extended periods, overnight and during possible IT upgrades.

- Available to apply on a user basis
- Provides warning message to user notifying them to save work prior to session termination and also allows time interval to be reset if user is working in loan for extended period of time



## TOTAL MORTGAGE INFORMATION (TMI) LOG

This is our version of the Conversation Log with robust functionality and ease of use.

- Customized Conversation Log that allows users to communicate on a particular loan file from the pipeline without ever entering a loan
- Post comments & receive responses to conversations while working in or outside of a loan
- Custom notifications to let you know when you have a new comment posted for your review
- Total Mortgage Information all the time...

### FOR MORE INFORMATION CONTACT:

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## LOAN VALIDATION TOOL

With so many investor requirements and product restrictions changing, the need to have your users aware of these changes immediately has never been greater. The loan validation tool is fully customizable and can compare any data element within a loan file including: FICO score, employment, LTV, DTI and Loan Product.

### Common Use Cases:

- Compares current file to how it was locked
- Compares file to how it was last underwritten
- Compares current loan or final underwrite

LVT includes business rules to prevent a file from closing if discrepancies exist



## PRODUCTIVITY MANAGER

Provides management with data & reporting including:

- Number of files a user has opened within a specific time period
- How long a user was in each file
- What fields were updated and time in/out of each file
- Run true productivity reports and benchmarking across departments with factual data

**EACH REMOTE ASSISTANT PACKAGE COMES WITH THE IGNITE CUSTOM MENU TO SUPPORT THE MULTIPLE INTERNAL AND EXTERNAL SITES THAT WILL NEED TO BE ACCESSED IN THE COMING MONTHS.**

**CUSTOM PACKAGE PRICING CAN BE CREATED UPON REQUEST.**



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