

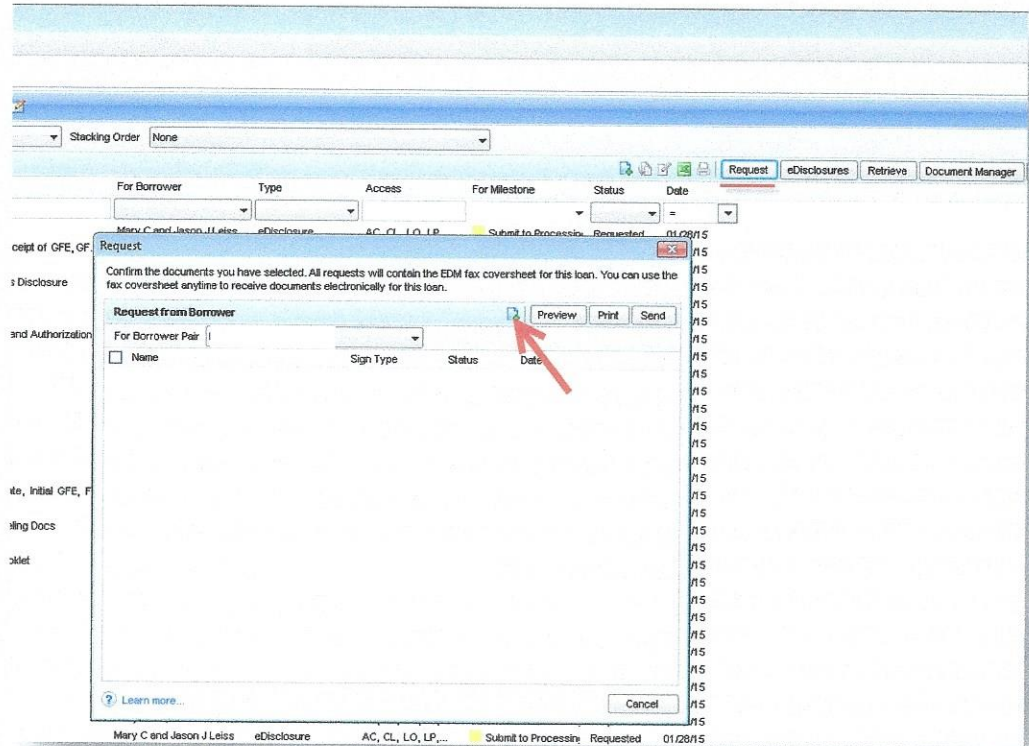
ENCOMPASS JOB AID - Using the eFolder

Request Docs:

To request documents from a borrower or person associated with a file

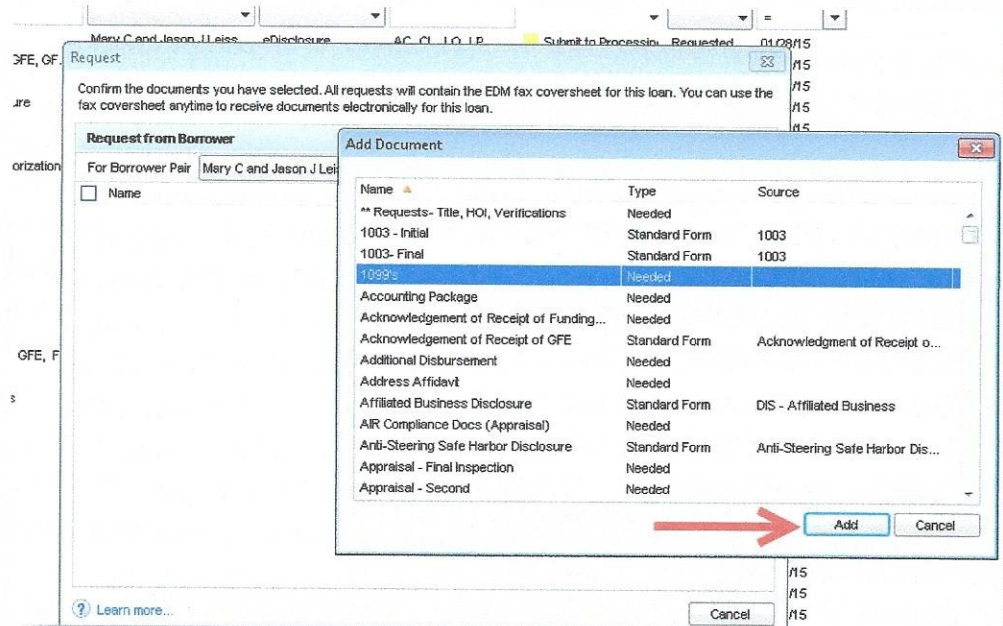
1. Click Request

2. Click on the Paper with + Sign – This will take you into a screen to select the document you want to request. This feature will link the document when the borrower uploads the file.



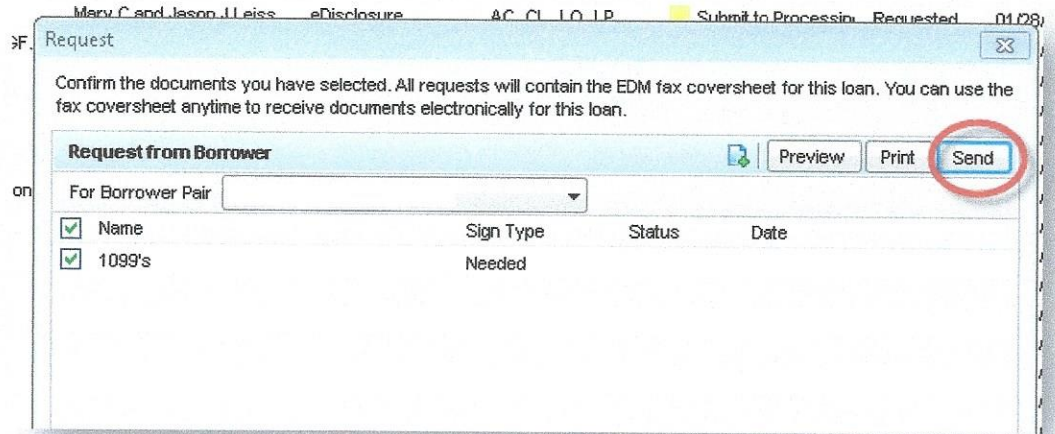
3. Select Document

4. Click Add



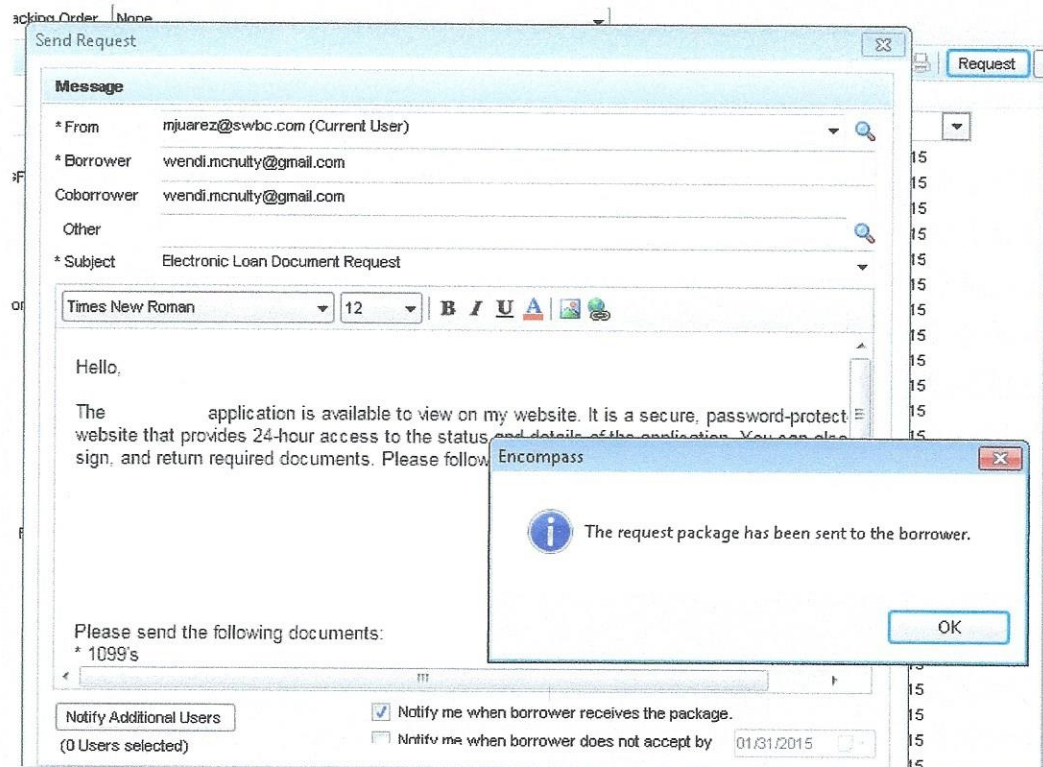
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5. Click Send



6. An email will open. You can edit the Subject line and verbiage of this email to explain to your borrowers what you are requesting.

7. Click Send

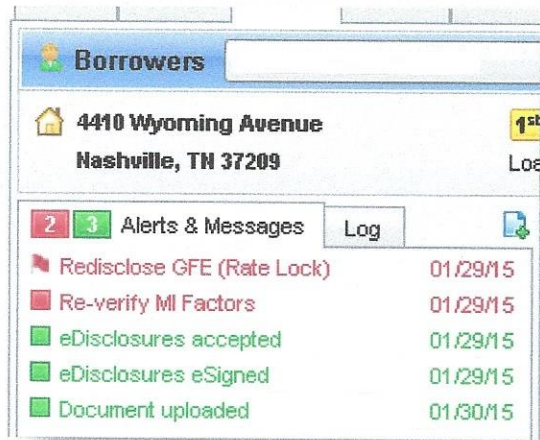


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8. Your borrower will receive an email with a link to their secure loan center. They will then be able to browse and attach the documents you have requested.

You will then receive a notification they have uploaded the documents.

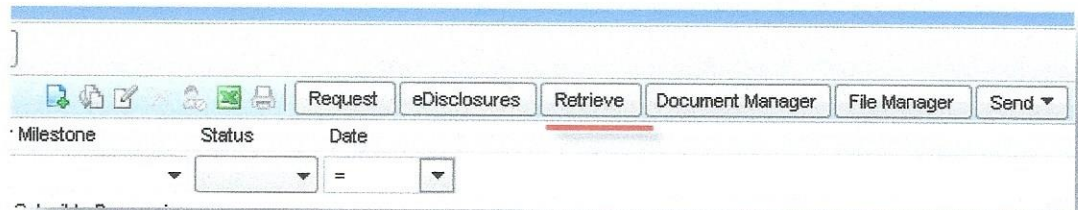
You will also see a notification in green within the loan file.



Retrieving Docs:

When a borrower signs their eDisclosures or uploads a document to through the secure loan portal.

1. Click Retrieve



2. Select the document or all documents and Click Download

