Encompass Loan Connect for Business Partners

Your business partners such as realtors, appraisers, attorneys, and other non-Encompass users can contribute to a loan file using Encompass Loan Connect.

Please note that Encompass Loan Connect is available only to users with access to loans originated in **Encompass Consumer Connect**.

> Encompass Loan Connect replaces the Encompass Loan Center for loans originated in Encompass Consumer Connect. Loan Center will continue to be available while older loans are still being processed. Please inform your business partners to use the site provided in the notification email to contribute to the loan, whether it points to Loan Center or Loan Connect.

Features available in Loan Connect include:

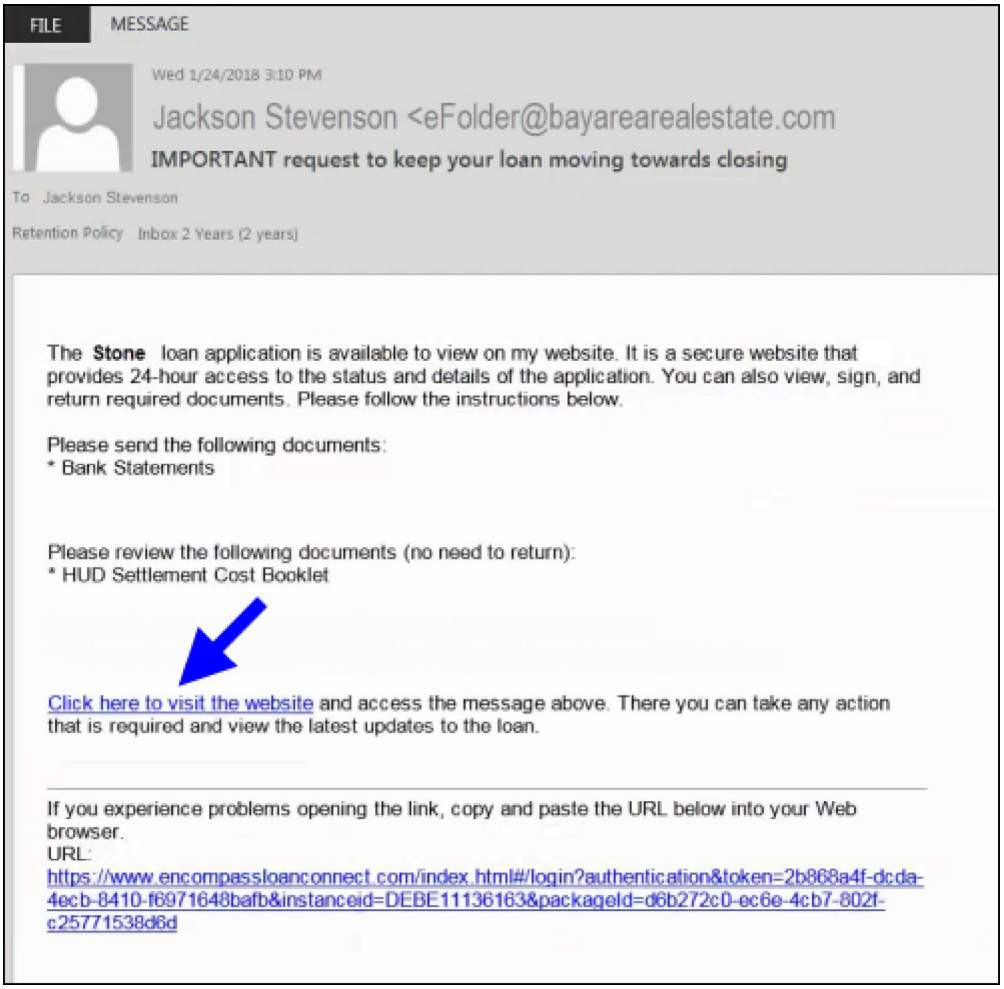
- View To-Do lists (pending and completed)
- Upload documents
- View uploaded documents
- View notifications
- Manage account

Learn how your business partner can:

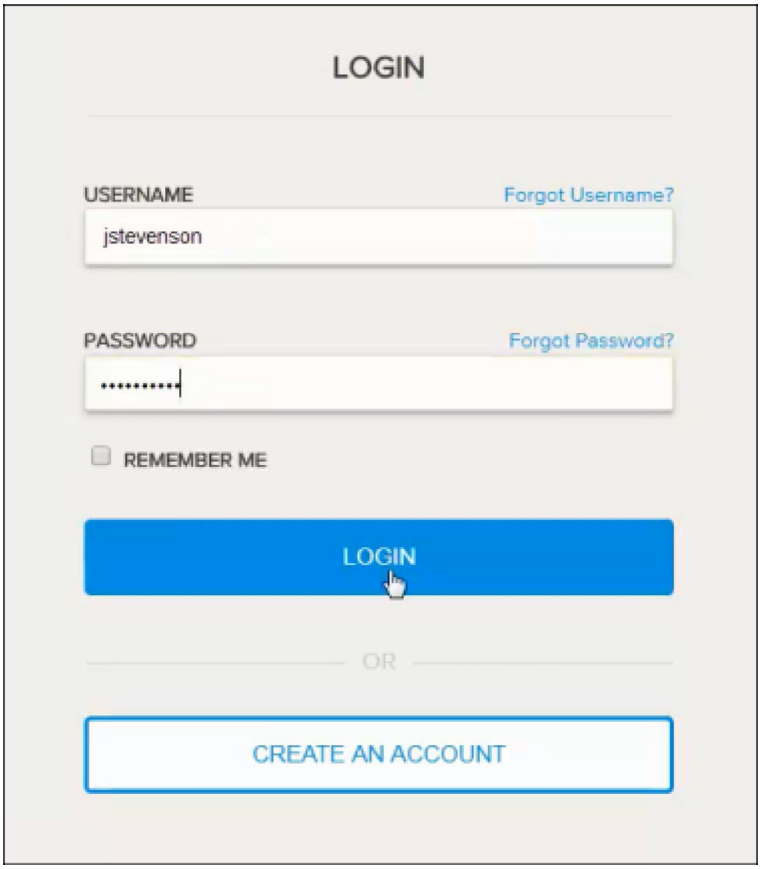
Access Loan Connect

When you request documents from a business partner, Encompass sends a notification email to the email address specified for the business partner. The email contains a unique link to the loan file in Loan Connect.

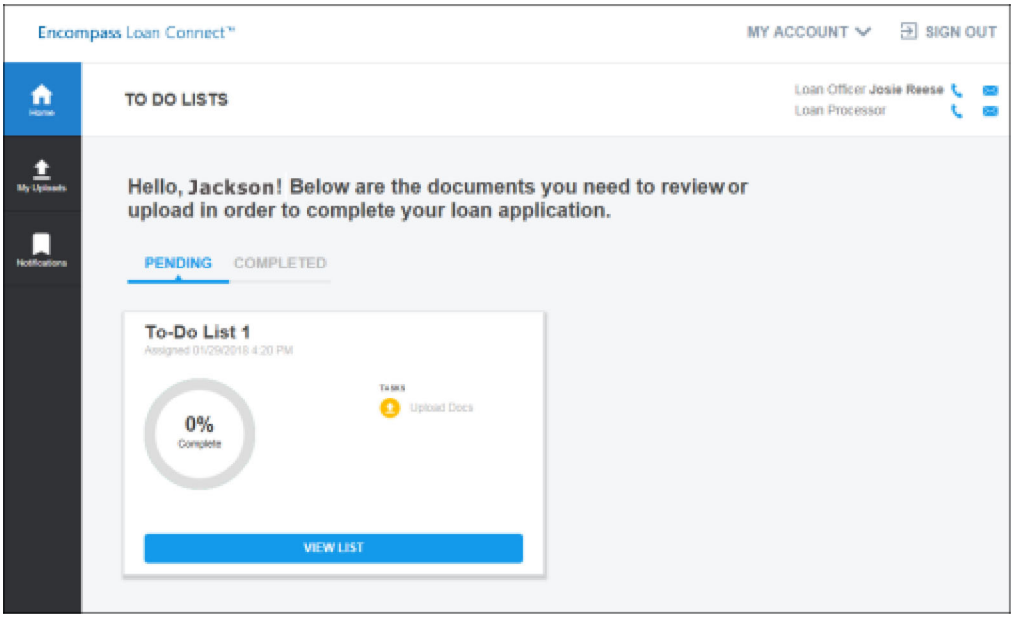
> The link directs the business partner to a single loan file in Loan Connect. If a business partner is working with multiple loans, he or she will access each loan file from it's corresponding unique link.



The business partner clicks the link and signs in to Loan Connect to complete the loan tasks. If the business partner is accessing Loan Connect for the first time, they will need to create an account before signing in.



Loan Connect opens to the home page displaying the To Do Lists for the business partner.



Upload Documents with Loan Connect

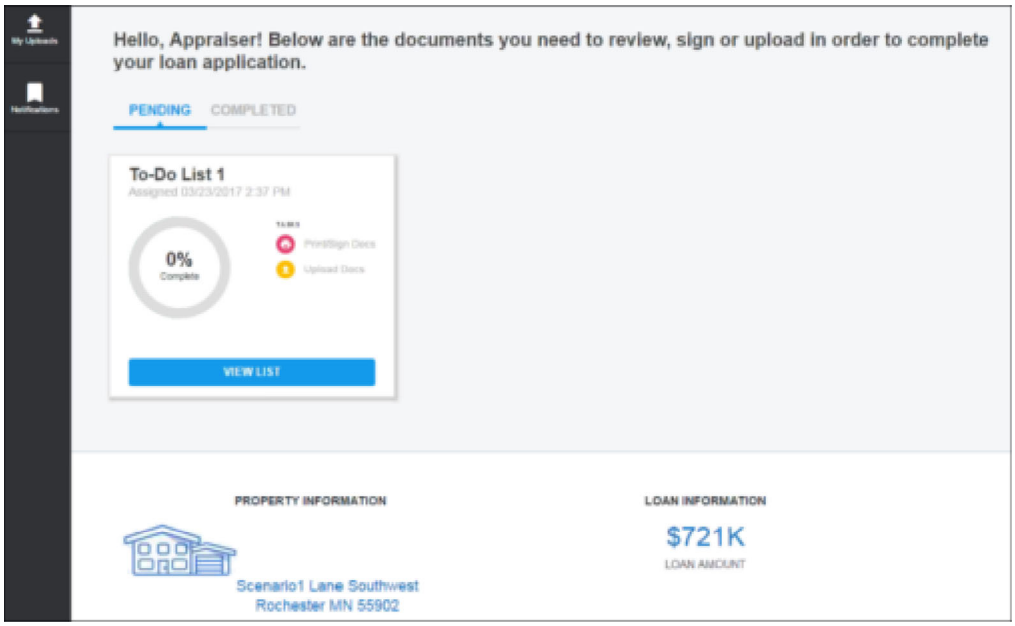
To Upload Documents:

1. Business partner logs into Loan Connect.

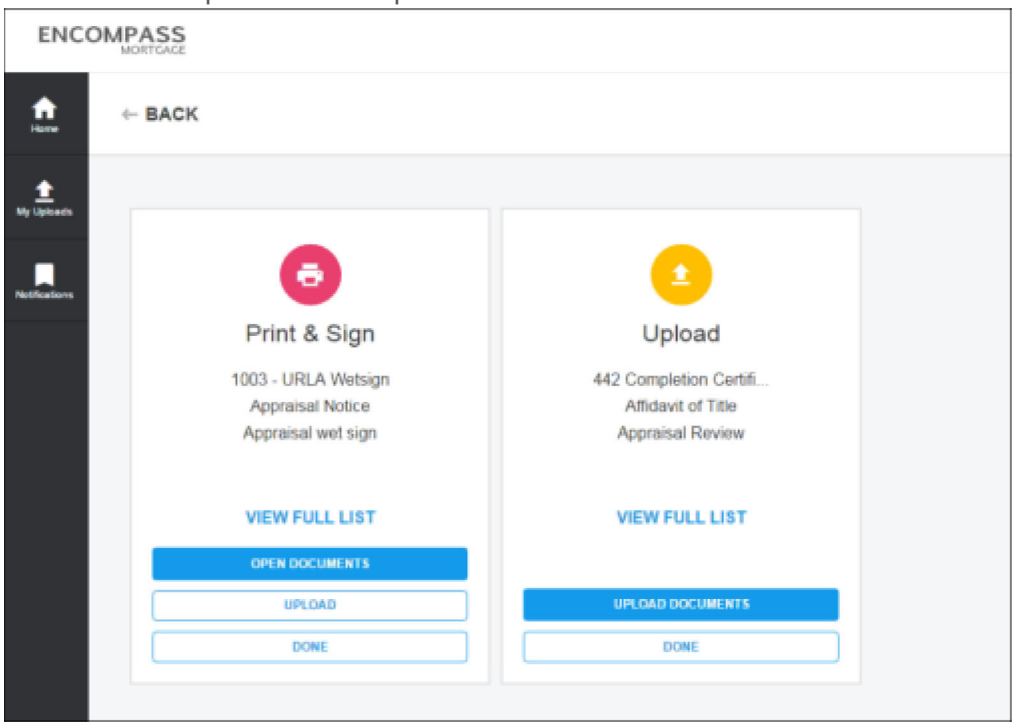
2. If the Authorization Code has not already been entered, the business partner enters the Authorization Code to gain access to the loan documents.

3. The Authorization Code is created by the Encompass user who sent the electronic document request from the eFolder. The Encompass user must contact the business partner to provide the Authorization Code. If authentication fails five times, the business partner will be required to print and wet sign the document.

4. Partner tasks are shown in the To Do Lists.



5. The business partner clicks **Upload** to upload wet-signed documents or **Upload Documents** to upload other required documents.

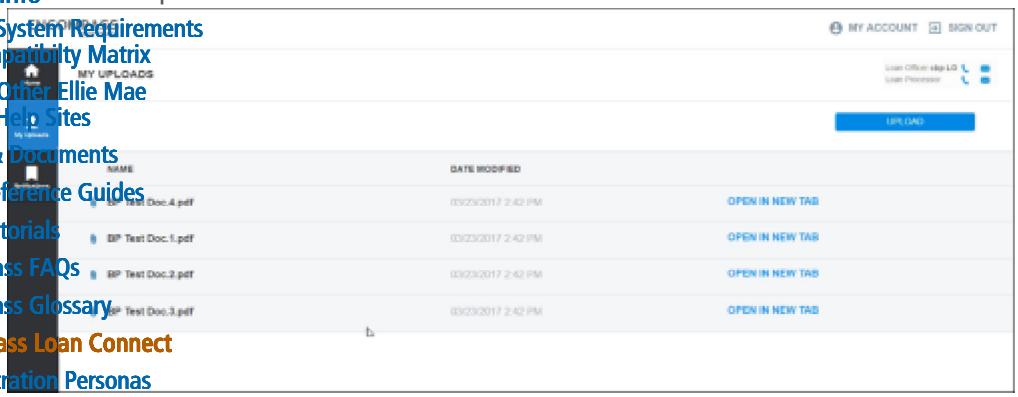


6. Business partner selects the files to upload.

The following file extensions are supported for Browse and Attach: pdf, doc, docx, txt, tif, jpg, jpeg, emf and xps formats.

7. Business partner clicks **Upload**.

8. After the files are uploaded to Loan Connect, the business partner can click **My Uploads** to view all uploaded documents for the loan file.



Additional Info
Product System Requirements and Compatibility Matrix
Links to Other Ellie Mae Product Help Sites
Guides & Documents
Quick Reference Guides
Video Tutorials
Encompass FAQs
Encompass Glossary
Encompass Loan Connect
Administration Personas
Adverse Loan Status
Encompass and Ellie Mae Network Passwords
Encompass Investor Connect
Access to Loan Files and Data
Loan Officer License Enforcement
Loan Status
LTV and CLTV Ratios
Qualifying Rates
Tracking the Status of a Loan
Working with 2010 RESPA and MDIA Regulations
Working with 2015 RESPA-TILA Regulations
HMDA Support
UCD Support
URLA 2020 Support

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