ICE Mortgage Technology™

Encompass Investor Connect best practices guide:

Best practices for loan delivery efficiency

Encompass Investor Connect™ is the fastest and easiest way to drive more efficient, better quality loan deliveries from Encompass® lenders to investors. Follow the below steps to optimize your loan delivery and timelines.

1. Set up stacking templates

Although stacking templates are not required for investor delivery, setting up a stacking template helps improve loan delivery quality, and speed up review and purchase times. Read about setting up stacking templates here.

2. Know your investor guidelines and required fields

Understanding your investor's requirements will help you deliver complete packages for faster reviews and purchases. If you are unsure of your investor's requirements or required fields, refer to the investor's Encompass Investor Connect addendum.

3. Create custom pipeline views

Track loan delivery status easily and at a glance by customizing your Encompass Pipeline view. See the View Loan Delivery Statuses article to access one-time set up instructions.

4. Set up Investor Connect email notifications

Make sure you know the status of your loan delivery by setting up email alerts. Go to the Configure Email Notifications article for more information.

5. Create separate eFolder documents

Make it easier for investors to quickly identify specific types of document files by creating separate eFolder document entries for each file type.

DO:

Create separate eFolder documents so your investor knows which documents they've received.

Example: Investor knows at a glance which documents are delivered:

- Smith W2s:
  - Adam Smith W2
  - Lisa Smith W2

DON'T:

Avoid delivering unorganized folders that require investors to identify which documents have been received.

Example: Investor must open each file to see what documents are inside:

- Smith Documents:
  - W2 A
  - W2 B

6. Add barcodes if needed

If your investor uses barcodes to identify documents, you can add them to your eFolder documents. For information, refer to the Document Identification topic in the Encompass online help site.

7. Have loan information handy for customer support

If you need to contact ICE Mortgage Technology for support, have the following information ready to achieve a faster resolution:

- Loan GUID
- Transaction/Package ID
- Stacking template name
- Error message from IC Status page (click on view log)
- Screen capture of IC Status page

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