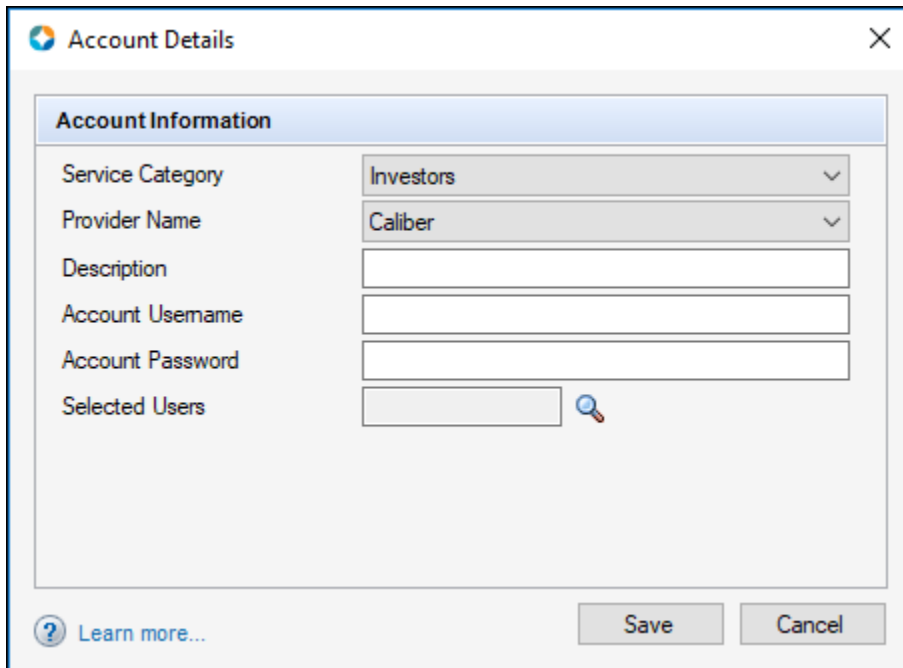


## Caliber Home Loans Addendum to the Encompass Investor Connect Lender User's Guide

### Login Credentials

When your Encompass administrator configures the Account Details window for your Caliber Home Loans account in the Encompass Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**), the recommended best practice is to use the same login credentials that your company uses to access the Caliber portal.



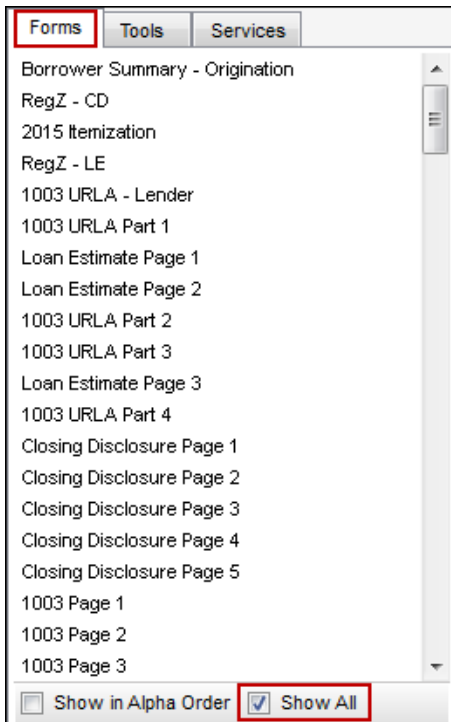
Account Information	
Service Category	Investors
Provider Name	Caliber
Description	
Account Username	
Account Password	
Selected Users	

### Investor Loan Number

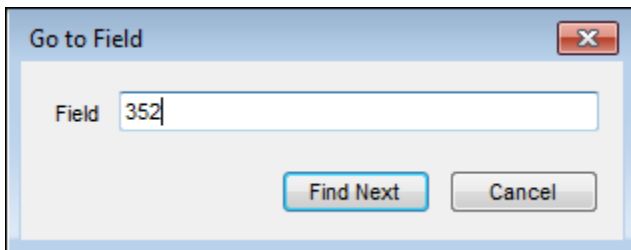
To successfully deliver loan packages, Caliber Home Loans requires an Investor Loan Number in each loan file submitted through Encompass Investor Connect.

## To Add the Caliber Investor Loan Number:

1. Open the loan file, click the **Forms** tab in the lower-left panel, and then select the **Show All** check box.



2. Press **Ctrl+G**.
3. Type **352** in the field and click **Find Next**.



4. The first form on which the field is found opens with the field highlighted. Enter the Caliber Investor Loan Number in the field, and then save the loan.

**NOTE:** The Loan Number must include numbers only. Non-numeric characters such as dashes or letters are not permitted. Be aware that Investor Connect does not currently validate the formatting for this field, and an error message will not display if the formatting does not match the guidelines set by Caliber Home Loans.

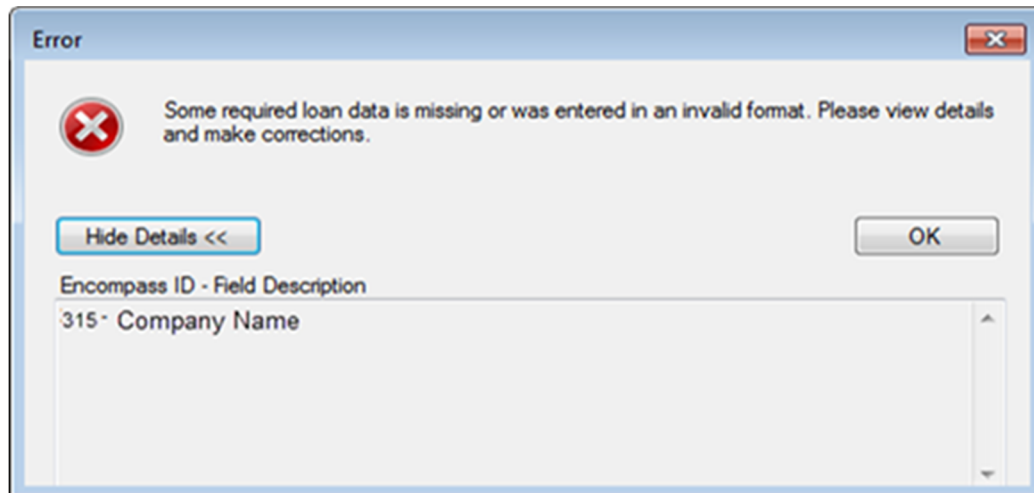
## Company Name Field

To successfully deliver loan packages, Caliber Home Loans requires that the Company Name (field ID 315) be populated in each loan file submitted through Encompass Investor Connect.

If a loan package is submitted without completing this field, the loan package displays a status of **Error** in the Loan Delivery Status window. The loan number is listed for each loan in the package and **View Log** links displays next to loans with errors. To determine if the error is caused by a missing Company Name, click the **View Log** link.

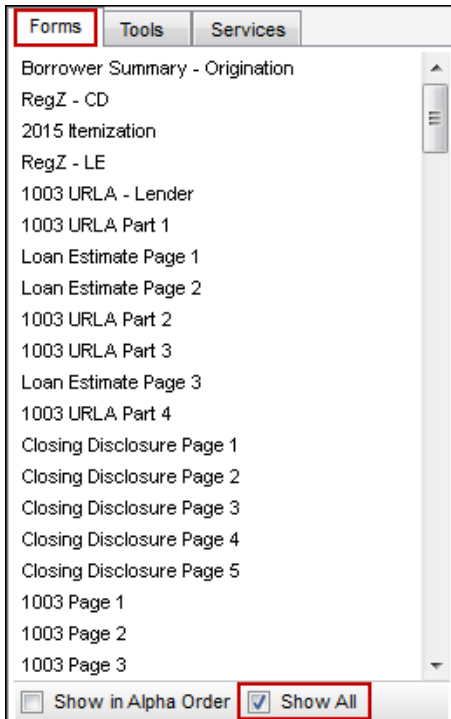
Loan Number	Submission Type	Submission Date	Status	Status Date	Actions
		=		=	
2123131901EM3	default		In Progress	1/30/2019 4:47:47 PM	
2123131901EM3	default	1/30/2019 4:49:27 PM	Submitted	1/30/2019 4:49:27 PM	
2123131901EM3	default		Error	1/30/2019 4:14:19 PM	<a href="#">View Log</a>
2123131901EM3	default		Error	1/30/2019 4:14:19 PM	<a href="#">View Log</a>

If the Company Name field is missing from a loan file, the following error message displays when the lender clicks the **View Log** link.

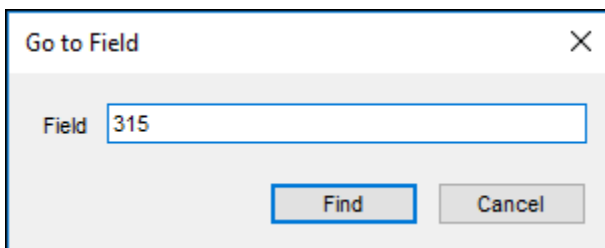


### To Add the Company Name:

1. On the Loan Delivery Status window, find the Loan Number for the loan file in Encompass that had the error message.
2. Open the loan file in Encompass, click the **Forms** tab in the lower-left panel, and then select the **Show All** check box.



3. Press **Ctrl+G**.
4. Type **315** in the field and click **Find Next**.



5. The first form on which the field is found opens with the field highlighted. Enter the Company Name in the field, and then save the loan.

## **Package Type Options**

The **Package Type** drop-down list in the Add Submission Details section of the Deliver Loans window enables lenders to submit Condo, Pre-Close Renovation, Prior Review, and TRID loan packages without having to access Caliber's Correspondent Lending Portal. This field is a required field that is populated with a blank value by default. Lenders can select one of the following options from the drop-down list when submitting a loan package:

- Funding Package
- Condo
- Pre Close Renovation
- Prior Review
- TRID