

Planet Home Lending Correspondent Addendum to the Encompass Investor Connect Lender User's Guide

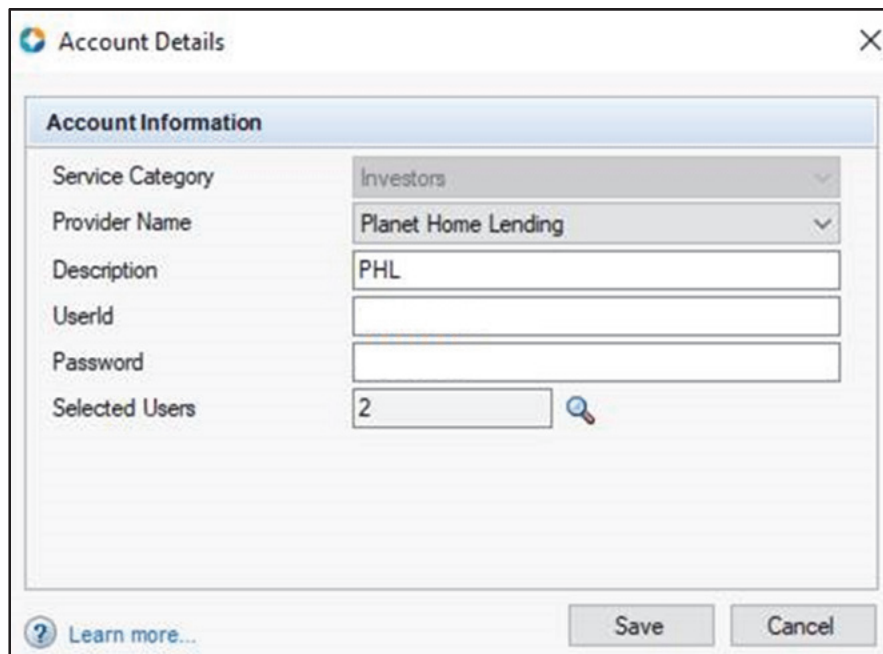
Complete the following steps to successfully deliver loan packages to Planet Home Lending through Encompass Investor Connect.

Configuring Your Investor Connect Setup

Your administrator needs to complete the following steps when configuring Encompass Investor Connect in the Encompass settings.

Services Password Management

Your Encompass administrator must follow these guidelines when creating the Account Details entry for Planet Home Lending in the Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**):



Account Information	
Service Category	Investors
Provider Name	Planet Home Lending
Description	PHL
UserId	
Password	
Selected Users	2

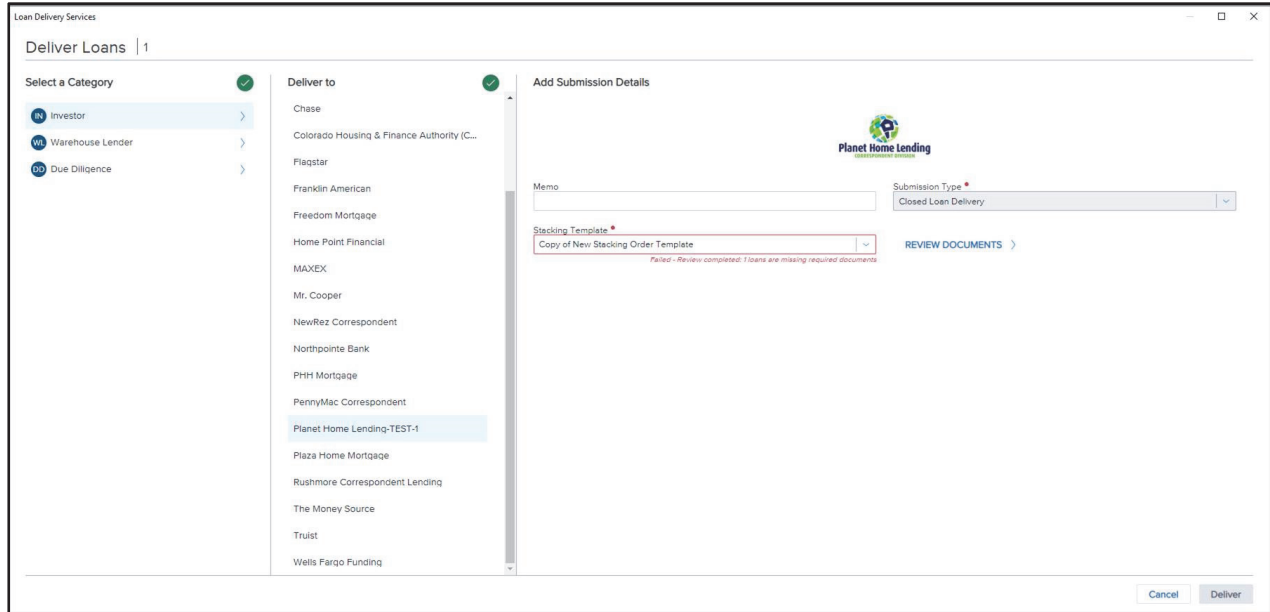
IMPORTANT: Please contact clientadmingroup@planethomelending.com to have your access credentials provided.

- Enter the account UserID provided by Planet Home Lending.
- Enter the account Password provided by Planet Home Lending.

Submitting Data and Document Packages

Encompass users must follow these guidelines when submitting data and document packages:

- On the Add Submission Details section of the Deliver Loans window:
 - Select **Closed Loan Delivery** from the **Submission Type** drop-down list.
 - Select a **Stacking Template** from the drop-down list.



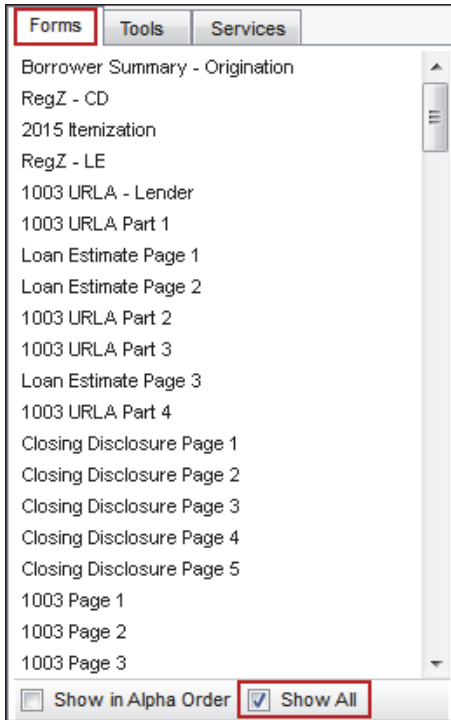
Required Data Fields

For all submissions, Planet Home Lending requires the below from the loan file submitted through Encompass Investor Connect to match the loan in Planet Home Lending's system.

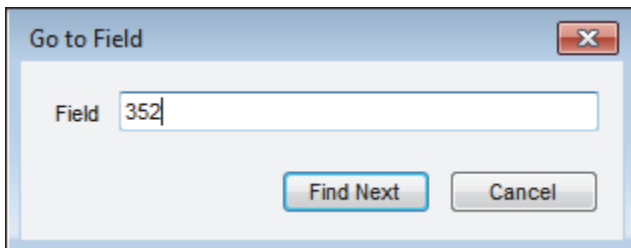
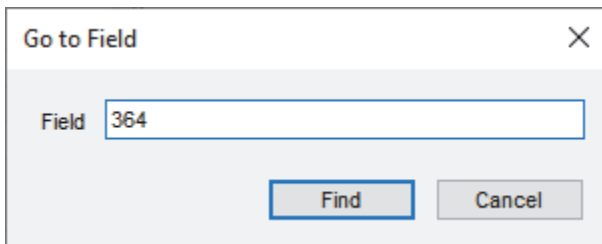
- Seller Loan Number - Encompass Field ID 364

To Add the Seller 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 **364** in search field and click **Find Next**.



This takes you to the field. Enter the information, and then save the loan.