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

Complete the following steps to successfully deliver loan packages to Rushmore through Encompass Investor Connect.

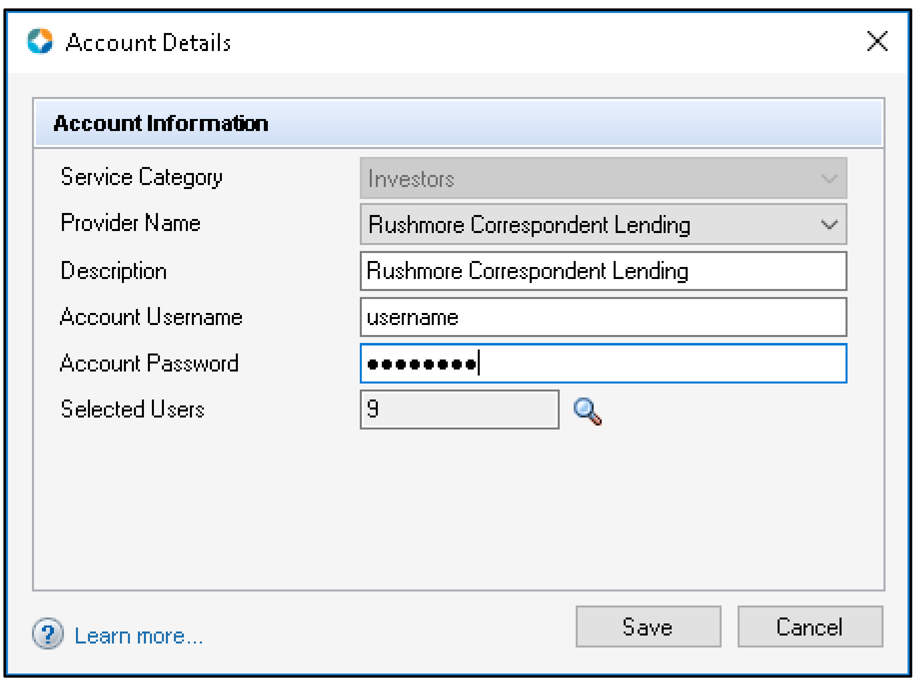
IMPORTANT: Use Encompass Investor Connect to deliver loans to Rushmore only for Registration and Closed Loan Delivery.

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 Rushmore in the Services Password Management setting (**Encompass** > **Settings** > **Company/User Setup** > **Services Password Management**):



Enter any existing credentials used to log in to the Rushmore web portal. Contact your Rushmore Account Executive, if you have any questions.

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 **Registration** or **Closed Loan Delivery** from the **Submission Type** drop-down list.
  - Select a **Stacking Template** when choosing **Closed Loan Delivery** from the drop-down list.

Required Data Fields

For a Registration, Rushmore requires the following fields in the loan file submitted through Encompass Investor Connect to match the loan in Rushmore's system.

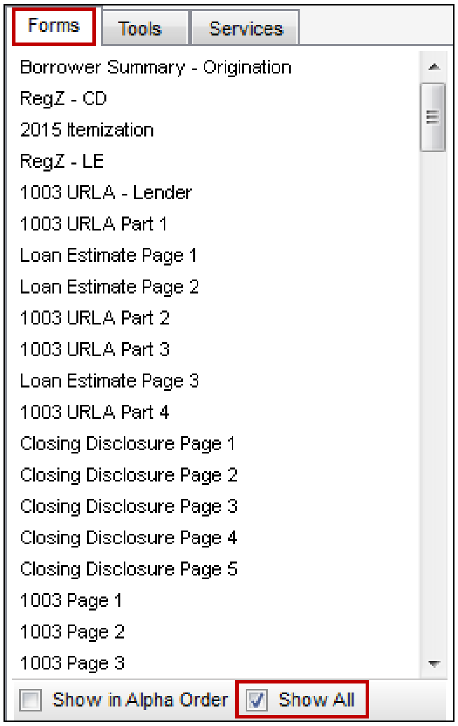
- Seller Loan Number - Encompass Field ID 364
- Lender Name - Encompass Field ID 315

For a smooth Closed Loan Delivery, Rushmore requires the below from the loan file submitted through Encompass Investor Connect to match the loan in Rushmore's system.

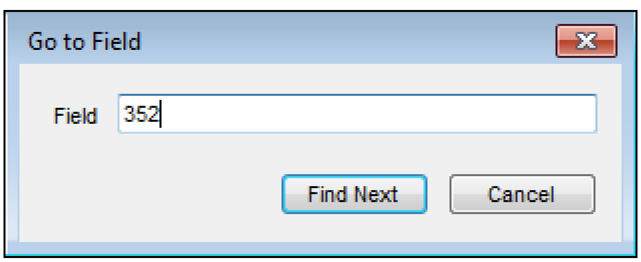
- Investor Loan Number - Encompass Field ID 352
- Seller Loan Number - Encompass Field ID 364
- Commitment Number - Encompass Field ID 3907
- Lender Name – Encompass Field ID 315
- Actual Ship Date - Encompass Field ID 2014
- Shipment Method - Encompass Field ID 2016
- Carrier - Encompass Field ID 2017
- Package Tracking # - Encompass Field ID 2018

To Add these fields:

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 the **Field ID** in the field and click **Find Next**.



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

Delivery Conditions

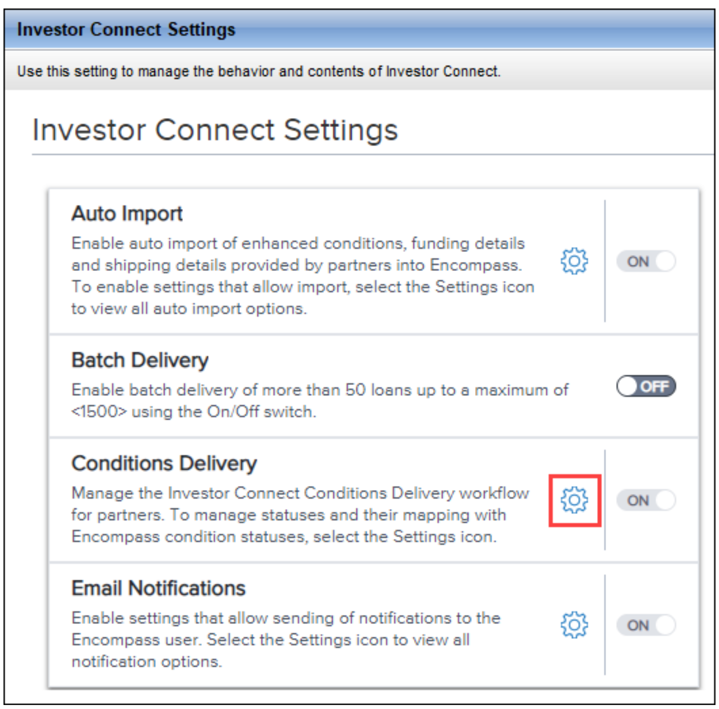
Rushmore has enabled the delivery conditions workflow with Encompass Investor Connect. For an overview of the steps required to set up and work with delivery conditions, refer to the Configure and Use Delivery Conditions in Encompass Investor Connect quick reference guide. For detailed information, please refer to the *Delivery Conditions* section of the Encompass Investor Connect Lender User's Guide.

Mapping Rushmore Condition Statuses to Encompass Condition Statuses

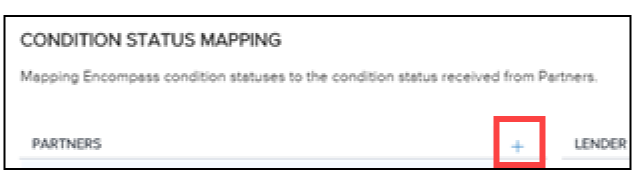
To ensure that conditions sent by Rushmore are assigned the correct status when they are imported into Encompass, use the Investor Connect Settings (**Encompass** > **Settings** > **External Company Setup** > **Investor Connect Setting**) to map the conditions statuses.

To Configure the Condition Mapping:

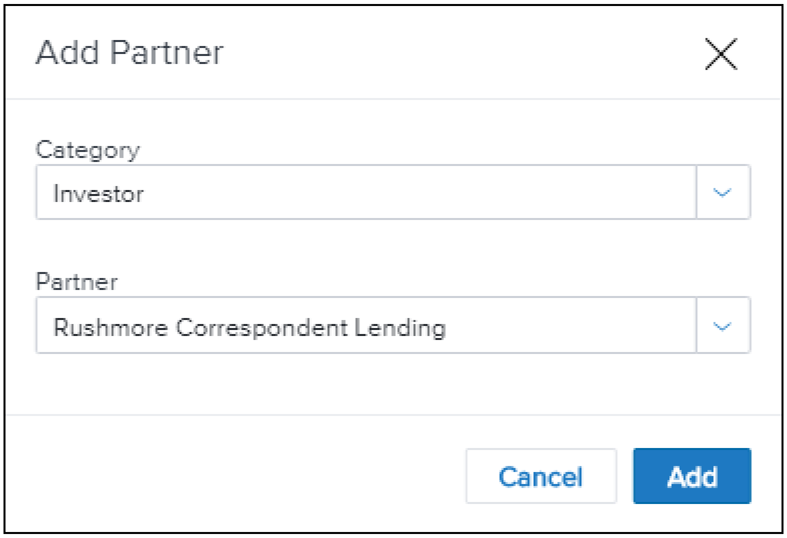
1. In the Investor Connect Settings, click the **Gear** icon for the Conditions Delivery feature.



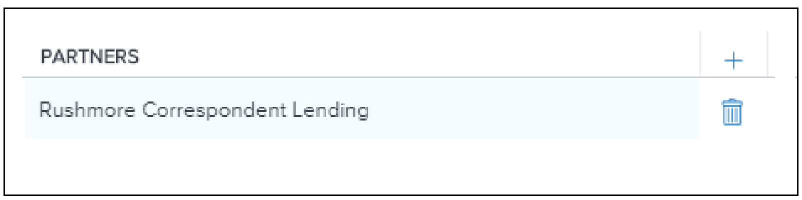
2. In the Condition Status Mapping section, if Rushmore is already listed in the Partner column, proceed to Step 4. If Rushmore does not display in the Partner column, click the **Add** icon.



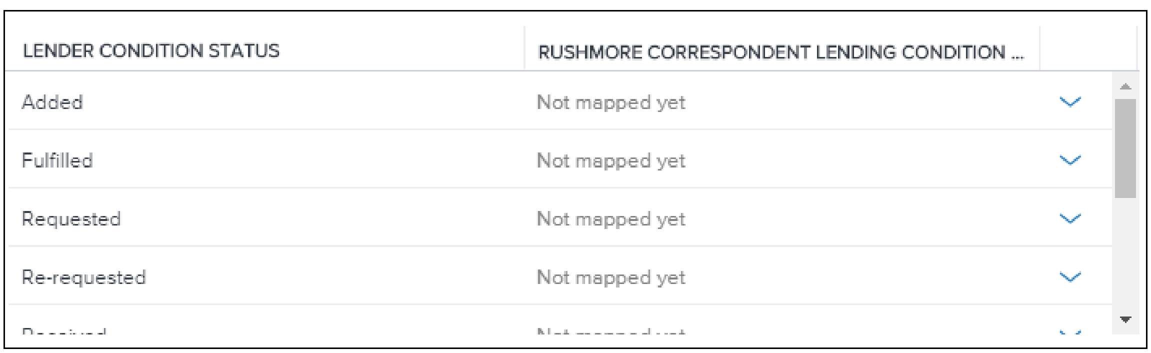
3. When the Add Partner window opens, select **Investor** for the Category, select **Rushmore** for the partner, and then click **Add**.



4. Select Rushmore from the Partner list.



The Encompass condition statuses display in the Lender Condition Status column. The condition statuses in the Rushmore Correspondent Lending Condition column will display **Not mapped yet** by default.



5. Click one of the **Arrow** icons on the far right in the Rushmore Correspondent Lending Condition column to open a pop-up window where you can select a check box to map a Rushmore condition to an Encompass condition.

6. Select the mapping options shown below to configure the condition statuses supported by Rushmore.

LENDER CONDITION STATUS	RUSHMORE CORRESPONDENT LENDING CONDITION ...
Added	New Conditions
Fulfilled	Not mapped yet
Requested	Not mapped yet
Re-requested	Problem Recondition
Received	Received Pending Review
Reviewed	Not mapped yet
Rejected	Deactivated
Cleared	Cleared
Waived	Waived

Delivery Condition Responses

If you send a condition response back to Rushmore, be sure to attach the required documents and/or comments to the condition. This ensures that Rushmore is aware of any updates you made to fulfill the condition or any questions you may have about the condition.