

1. Start by logging in and opening the applicants loan file.

The screenshot shows the Encompass software interface. At the top, there is a menu bar with options: Encompass, View, Loan, Forms, Verifs, Tools, Services, Help. Below the menu bar, there are tabs for Home, Pipeline, Loan, Trades, Contacts, Dashboard, and Reports. The main area displays the borrower's information: Kevin Testcase. Below this, there is a summary of the loan: 9614 ORIOLE LANE, ANTHILL, MO 65488. Loan #: 1807000100, LTV: //, Rate: Not Locked, Est Closing Date: //, and FS: William Distrow.

2. Click on the Services tab in the bottom left corner. Select Order Verifications.

The screenshot shows the Services menu in the Encompass software. The menu is titled 'Services' and contains the following options: Order Flood Certification, Order Title & Closing, Order Doc Preparation, Register MERS, Order AVM, Order Mortgage Insurance, Order Fraud/Audit Services, Request HMDA Management, Order Additional Services, Order Verifications, Submit Investors, Submit Warehouse Lenders, Submit Due Diligence, and View My Custom Links. The 'Order Verifications' option is highlighted with a purple box and a purple arrow pointing to it.

A window will pop-up allowing you to choose your Provider. Then, click Submit to launch the order form.

The screenshot shows the Verifications pop-up window. The window has a title bar 'Verifications' and a close button. Inside, there are two tabs: 'My Providers' and 'All Providers'. Below the tabs, there is a list of providers with the instruction 'Select a provider and click Submit.' The list contains two entries: 'Xactus - Income VerificationX' and 'Xactus - Social Security Notification', both with 'Partner Connect' next to them. A purple arrow points to the 'Xactus - Income VerificationX' entry. At the bottom of the window, there are three buttons: 'Remove from My List', 'Submit', and 'Cancel'. A purple arrow points to the 'Submit' button.

3. Start by ensuring Manual is the Type of Order. Then, select the Type of Verification and complete the rest of the fields including Employee information. Your applicant information will pre-populate from the 1003.

**Order Type**

Experian Verify   The Work Number   **Manual**

**Type of Verification**

Verification of Employment  
 Verification of Employment & Income

Borrowers  
NICKIE GREEN   Loan Number

Rush

**Employee**

First Name: NICKIE   Middle:   Last Name: GREEN

Suffix:   Social Security Number: 123-00-3333

Street: 100 TERRACE AV   City: WEST HAVEN   State: CT   Zip: 06516

Phone:   Date Of Birth: 01-01-1999

4. Select whether this is the applicants Current or Previous employer and complete all fields.

**Employer**

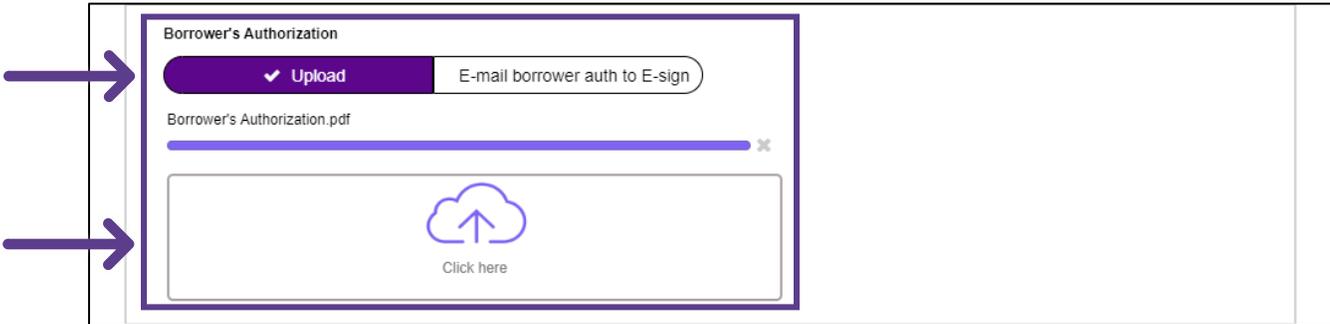
Employment Name: My Fake Company   Employment Type: Current

Street: 31550 Winterplace Parkway   City: Salisbury   State: MD   Zip: 21804

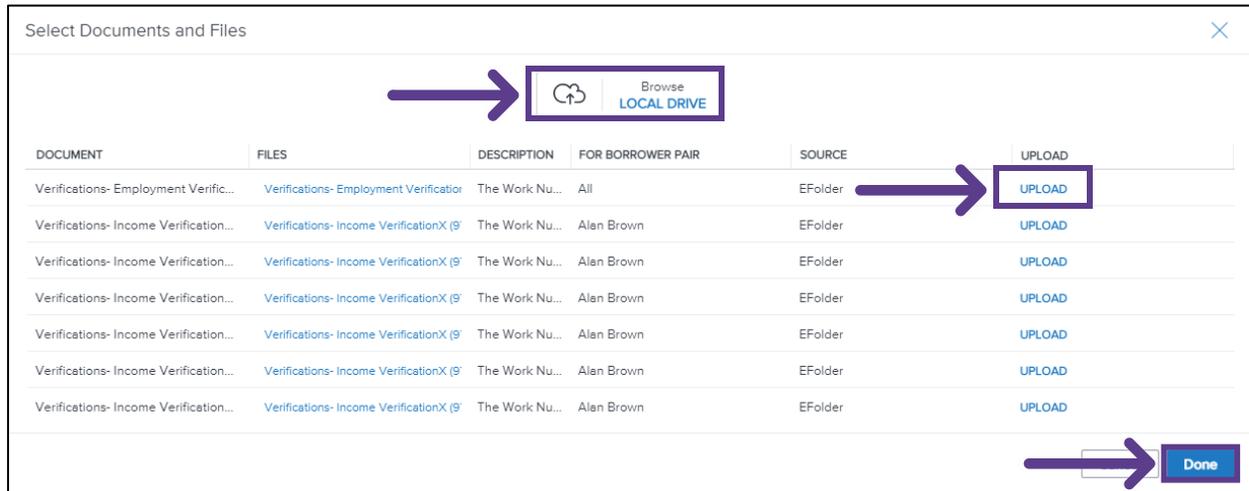
Position: FOH   Date Hired:   Date Terminated:   Phone: 800-258-3488

Enter Notes

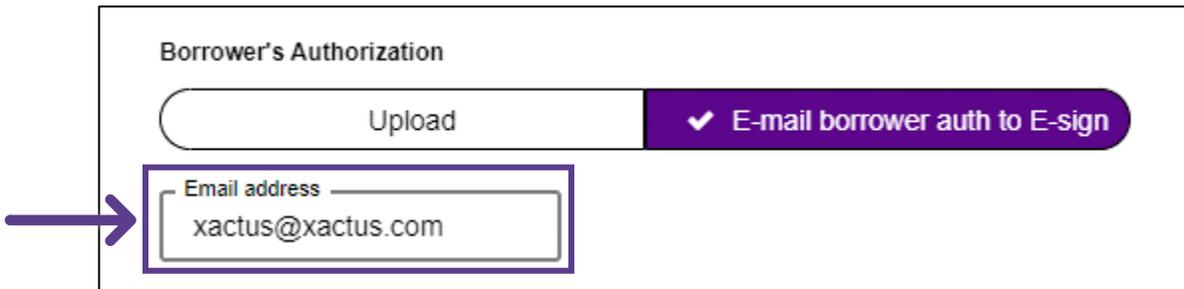
- Choose a file to attach for the authorization or select E-sign to have the document emailed. To upload a document, click 'Click here'.



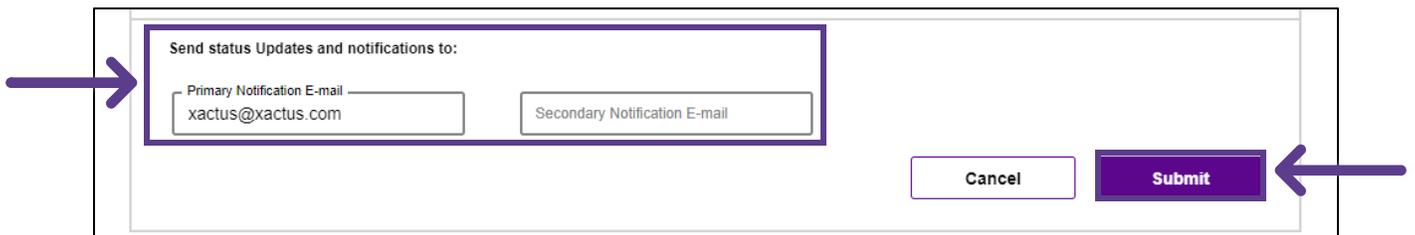
- Either browse for the document on your Local Drive or Upload one of the existing documents by clicking UPLOAD. When the document has been uploaded, click Done.



- If E-Sign is selected, enter the consumer's email address.



- Confirm the notification email address and click Submit when complete.





\*Please note Encompass Partner Connect (EPC) verifications use Dynamic & Default E-folders. A document cannot return to the e-folder while a loan is open/locked and may take up to 20 minutes. This is by design of EPC and not a result of a Xactus delay. All documents are available immediately on xactus360.com

1. The Default folder will be labeled verifications and remain in processing / requested status. This is the folder that will allow you to utilize the check status button next to the order verifications option and return to the report screen.

2. The Dynamic folder will return once your order is completed and be labeled with your product and vendor name and say Processing / Received. This is where your completed document will be located.

Alt	Fo	Name	Description	For Borrower Pair	Type	Access	For Milestone	Status	Date	
		1 Verifications	Verifications	KURT BIROVLJEV	Settlement Service	AC, CL, FN, LD,...		Processing	Requested	08/09/23
		2 Income VerificationX (29393)	Experian Verify	KURT BIROVLJEV	Settlement Service	AC, CL, FN, LD,...		Processing	Received	08/09/23

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.