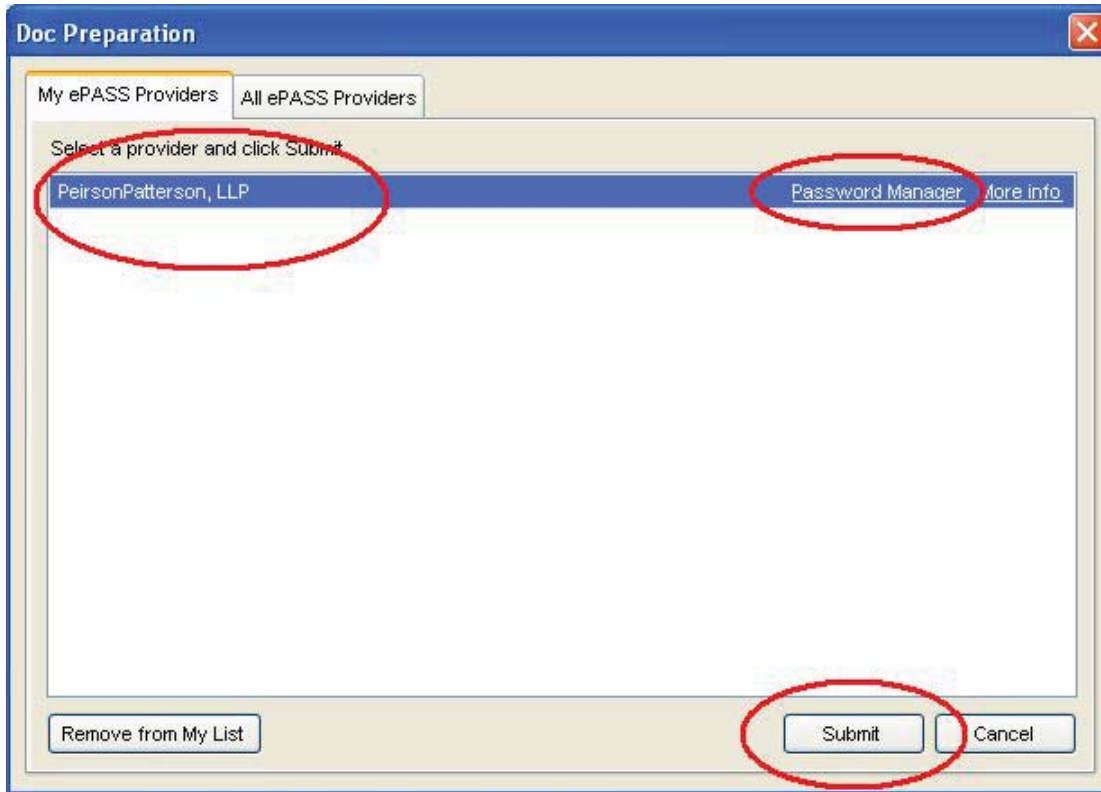


# HOW TO IMPORT DATA USING ENCOMPASS

Open Encompass and when you're ready to import your file click "Services" then "Doc Preparation"

The screenshot displays the Encompass360 software interface. The main menu bar at the top includes 'Encompass', 'View', 'Loan', 'Forms', 'Verifs', 'Tools', 'Services', and 'Help'. The 'Services' menu item is circled in red. Below the menu bar, there are navigation tabs for 'Home', 'Pipeline', 'Loan', 'Contacts', 'Dashboard', and 'Reports'. The main content area shows a 'Borrowers' section with a search bar containing 'Encompass Test'. Below this, there is a summary for a loan at '123 Happy Trails, Arlington, TX 76017'. The loan details include: Loan #: 45454545454, LTV: 100,000/100,000, Rate: 5.000%, Est Closing Date: 10/17/2009, Loan Amount: \$100,000.00, and DTI: /. The interface is divided into several sections: 'Alerts & Messages' (showing a 'Lock expired' alert on 11/02/09), 'Borrower Summary - Origination' (with a 'Current Status' of 'Active Loan'), and a 'Forms' sidebar on the left. The 'Borrower Summary - Origination' section is further divided into 'Borrower Information' and 'Co-Borrower' fields, including 'First Name', 'Middle', 'Last Name', 'SSN', 'DOB', 'H. Phone', 'W. Phone', 'Cell', 'Marital Status', and 'E-mail'. Below these are 'Present Address' and 'Previous Address' sections with fields for 'Address', 'City', 'State', 'Zip', and '# of Years' (with checkboxes for 'Y', 'M', 'Own', 'Rent'). The status bar at the bottom right shows the date and time: '10/19 15:18\* Tuesday, 12/29/2009'.

Choose "PeirsonPatterson, LLP" then click "Submit". (\*note: you need to have your PPDocs login and password input in the Password Manager)



Click "Submit Request"

Encompass360 - (Local) - admin

Encompass View ePASS Help

Home Pipeline Loan ePASS Contacts Dashboard Reports

peirsonpatterson, llp  
Attorneys at Law

**PeirsonPatterson, LLP a name you can count on.**

PeirsonPatterson, LLP is a Texas law firm specializing in the preparation of residential real estate documents nationwide. With over twenty years of service, PeirsonPatterson, LLP has built a reputation of providing quick and affordable, quality loan document services via our dynamic web-based legal document ordering platform. Our team of real estate legal professionals are eager to provide any institution the loan document preparation service they seek to gain or maintain an edge over their competition. PeirsonPatterson, LLP is a name industry professionals recognize and trust.

**Standard products include:** Closing Documents with Survey Review & Title Quality Control.

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**Existing Users of PPDocs' ePASS Interface:**    **—OR—**    **New to PPDocs' ePASS Interface:**

- [Submit Request](#)  
Click here to submit the Request.
- [Setup Login](#)  
Click here to setup the Login information.

- [Sign up with PPDocs](#)  
Click here to sign up with PPDocs.

**PeirsonPatterson, LLP.**  
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Phone: 800 800 9975  
Fax: 817 856 6060

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Done 10/19 15:16\* Tuesday, 12/29/2009

## Select the appropriate Order Form

### Select Order Form

Displaying order forms for TX. [Other states](#) are available.

The sort order of and availability of the list of order forms can be [customized](#) to suit your needs. [Contact us](#) at 800.800.9975 to find out how.

#### APPLICATION / PRE CLOSING ORDER FORMS



##### Initial Disclosures - Federal

Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, state specific disclosures (some Texas disclosures are available).



##### Aggregate Escrow Analysis

Calculations and forms to determine RESPA compliant starting balance for a loan closing.

#### SPECIALTY ORDER FORMS



##### Fax Cover Sheet

Fax cover sheet only.



##### RESPA GFE and HUD-1 Settlement Statement

This product can be used with or without P&P loan documents. Documents include the new 2010 GFE, HUD-1, TIL, Itemization of amount financed, and Amortization schedule.

#### CLOSING ORDER FORMS



##### Legal Documents Only

This package does not include a TIL. Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.



##### Residential Mortgage

Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.



##### Residential Consumer Bank Loan

Flexible Bank loan documents for loans not usually sold in secondary market i.e. true daily earnings computation. Also used for home improvements, vacation property and 2nd homes.



##### Residential Non-Consumer Bank Loan (Investment Property) - RESPA DOES NOT APPLY (Closing statement given - NOT HUD-1)

Flexible Bank loan documents. A TIL is not required for investment - business, agricultural or commercial transaction unless loan is used for personal, family, household purposes...then the new TIL format and GFE are required (use Residential Consumer Bank Loan Order form). If order is for 2nd home use the Residential Mortgage or Residential Consumer Bank Loan order form.



##### Texas Home Equity (Closed End)

## Was a GFE provided?

On certain closing document order forms we need to know if a GFE was provided

Home > Account > Respa

### RESPA

**IS THIS LOAN SUBJECT TO RESPA? DID YOU PROVIDE A GOOD FAITH ESTIMATE (GFE)?**

For more information about Reg X and RESPA, along with tools to determine whether your loan applies or not, visit our [RESPA Resources](#) or check out the [FAQ about RESPA](#) on our website. If you have further questions, please [contact us](#).

Was a GFE provided?

[Continue... >](#)

## Select Full Service or Express Service and click "order"

Home > Account > Products

### Residential Mortgage

Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

#### Select Service:

Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - RESPA	FREE	<a href="#">ORDER</a>
Express-Conventional, FHA, or VA Package - RESPA	FREE	<a href="#">ORDER</a>

**WHAT IS EXPRESS SERVICE?**

PPDocs, Inc. will NOT inspect, review, or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the document selection as needed. You may request multiple redraws as needed. There are no redraw fees.

**WHAT IS FULL SERVICE?**

PPDocs, Inc. will perform quality control of data based on the information entered on these order forms and provided via fax. We will select required document as well as review title commitment and survey.

## Select a profile and template if applicable, and then start a new order

### Select Default Data

#### Profile:

Profiles are preset names and addresses for a lender or branch. Typically, you will have one profile that contains your organization's name and address. If you are ordering for more than one branch or company, then multiple profiles may be needed. You must have at least one profile setup. If you have multiple profiles, be sure to select the correct one.

Select profile:

Carrie Goff, CBA ▾

#### Template:

Templates are files that contain data that is imported into your new order. This is designed to help save time when ordering documents that contain similar information to a template file. You can turn any order into a template. Templates are order form specific. If you do not wish to use a template select "\*\* Blank Template \*\*".

**ATTENTION: DO NOT USE TEMPLATES CREATED PRIOR TO JANUARY 1st, 2010 FOR LOANS REQUIRING THE NEW HUD-1. YOU MUST USE 2010 TEMPLATES TO ACCOMMODATE THE RECENT CHANGES TO RESPA.**

Select template:

\* Blank Template \* ▾

Start a new order >

Click "Open Order Form" and begin processing. At the end of the order form click "submit"

### Loan Information

Borrower:	Michael Young
Property:	12355 Northside Drive, TX
Lender:	ABC Lender
Loan Number:	111711
Last Modified:	7/23/2012 2:04:03 PM
Profile:	Carrie Goff, CBA
Template:	
Import:	PointWC 24

### Selected Product

#### Residential Mortgage

Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Express  
Fee: \$0.00

[Open Order Form](#) >

[Import Data](#) >

[Export Data](#) >

[View Data](#) >

[Print Summaries](#) >

[Clone Order](#) >

[Create Template](#) >

[Send Copy](#) >

[Archive Order](#) >

[Fax Cover Sheet](#) >