

How to Add a Borrower Pair Within Encompass

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

| Home | Pipeline | Loan | Trades | Contacts | Dashboard | Reports | | | | |
|---------------------------------------|--|------|--------|--------------|-----------|---------|------------|-----------------|-----------------------|--|
| 🙎 Boi | 🔒 Borrowers Nickie Green and Alan Brown 🗸 🗹 Search AllRegs 🚨 dFolder 🔒 🖨 🔀 | | | | | | | | | |
| 100 TERRACE AV 128 Loan #: 2308000154 | | | | 000154 | LTV: // | Rate: | Est C | losing Date: // | | |
| WEST HAVEN, CT 06516 | | | | Loan Amount: | | DTI: / | Not Locked | 🤱 F | FS: Xactus Test 🛛 🗸 🗸 | |

2. Then, click on the small icon to Manage Borrowers.



3. A window will pop-up showing the borrower pairs. Click the small icon to add a new borrower.

| Manage Borrowers | | | | | | |
|------------------|---------------|---------------|-----------------------------|--|--|--|
| Borrower Pairs | | rower Pairs | Import Dointe Borrower Pair | | | |
| Pa | Pair Borrower | | Co-Borrower | | | |
| 1 | | Green, Nickie | Brown, Alan | | | |

4. Add the borrower information at the bottom of the screen. Then click Close.

| В | Borrower | | Move | Co-Borrower | Move | Delete Co-Borrower |
|-----|---------------------|-------------|--------|----------------------|-------------|--------------------|
| Ve | esting Type | | ~ | Vesting Type | | ~ |
| Fir | irst Name | Kevin | | First Name | Hannah | |
| Mi | iddle | | | Middle | | |
| La | ast Name | Testcase | Suffix | Last Name | Testcase | Suffix |
| SS | SN | 000-00-0006 | | SSN | 000-00-0011 | |
| Ex | xperian/FICO | | | Experian/FICO | | |
| Tr | rans Union/Empirica | | | Trans Union/Empirica | | |
| Eq | quiFax/BEACON | | | EquiFax/BEACON | | |
| Se | elf-Employed | 0 | | Self-Employed | | |
| ? | Learn more | _ | | | | Close |

5. If an individual order is needed on only the Co-borrower, click Move.

| Borrower | | Move | Co-Borrower | Move | ociete co-porrower | |
|--------------|-------------|--------|--------------|-------------|--------------------|--|
| Vesting Type | | ~ | Vesting Type | | ~ | |
| First Name | Kevin | | First Name | Hannah | | |
| Middle | Middle | | Middle | | | |
| Last Name | Testcase | Suffix | Last Name | Testcase | Suffix | |
| SSN | 000-00-0006 | | SSN | 000-00-0011 | | |

6. Select the borrower position to swap with the selected borrower.

| N | Nove Bo | orrower | | | | | × |
|---|---------|----------------------------|--------------------------|--------|-----------------|------|-------|
| | Choose | e a borrower position to s | wap with the selected bo | mower: | | | |
| | Borro | ower Pairs | | | | | |
| | 1 | O Nickie Green | | | O Alan Brown | | |
| | 2 | Kevin Testcase | \leftarrow | | Hannah Testcase | | |
| | 3 | 0 | • | | | | |
| | 4 | 0 | | | | | |
| | 5 | 0 | | | | | |
| | 6 | 0 | | | | | |
| | | | | | | | |
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| | | | | | | | |
| | | | | | | Move | ancel |
| - | | | | | | | |

7. Select Yes.

| Encompa | ISS | × |
|---------|--|---|
| ? | Are you sure you want to swap selected borrower information to another borrower? | |
| | Yes | |

| Manag | ge Borrowers | | | | | | | | × |
|-------|--------------------|-------------|--------|-----|----------------------|-------------|-------|-------------------|---------------|
| Bo | rrower Pairs | | | | Import | 2 | ۰ 🐣 | Delete Borrower P | air |
| Pair | r Borrower | | | | Co-Borrower | | | | |
| 1 | Green, Nickie | | | | Brown, Alan | | | | |
| 2 | 2 Testcase, Hannah | | | | Testcase, Kevin | | | | |
| - | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | _ |
| | | | | | | | | | |
| Bo | rrower | | M | ove | Co-Borrower | M | love | Delete Co-Borrow | /er |
| Ves | ting Type | | | ~ v | Vesting Type | ~ | | | $\overline{}$ |
| First | t Name | Hannah | | | First Name | Kevin | | | |
| Mide | dle | | | | Middle | _ | | | |
| Las | t Name | Testcase | Suffix | La | Last Name | Testca | ase | Suffix | |
| SSN | I | 000-00-0011 | | | SSN | 000-00-0006 | | | _ |
| Exp | erian/FICO | | | | Experian/FICO | | | | |
| Trar | ns Union/Empirica | | | Т | Trans Union/Empirica | | | | |
| Equi | iFax/BEACON | | | | EquiFax/BEACON | | | | |
| Self | -Employed | 0 | | | Self-Employed | 0 | | | |
| ? L | earn more | | 1 | | | | Close | ; | |

8. You will now notice that Hannah is the primary Borrower.

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