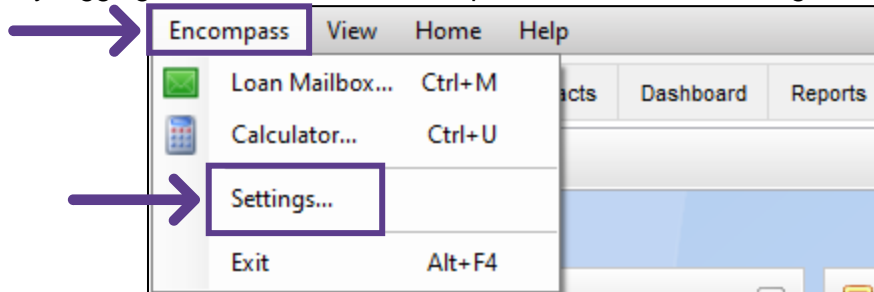
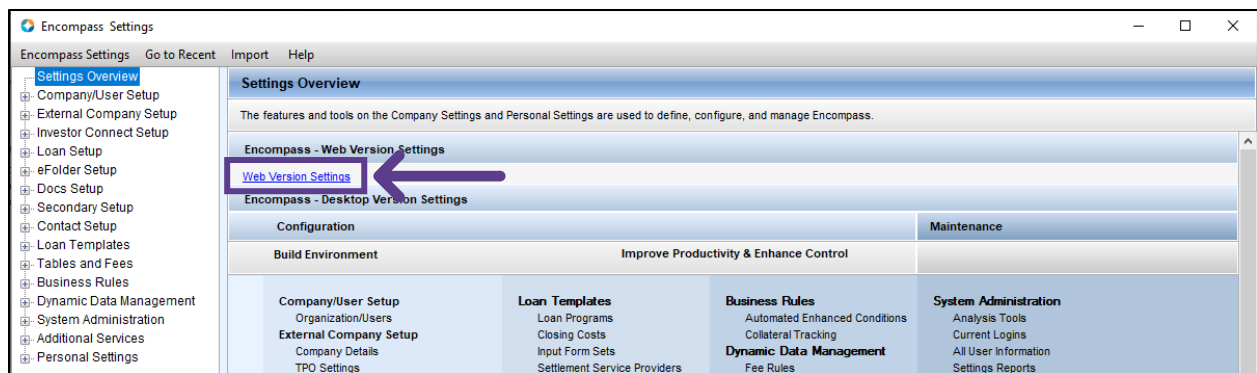


How to Enable Encompass Partner Connect™ (EPC) for Verifications

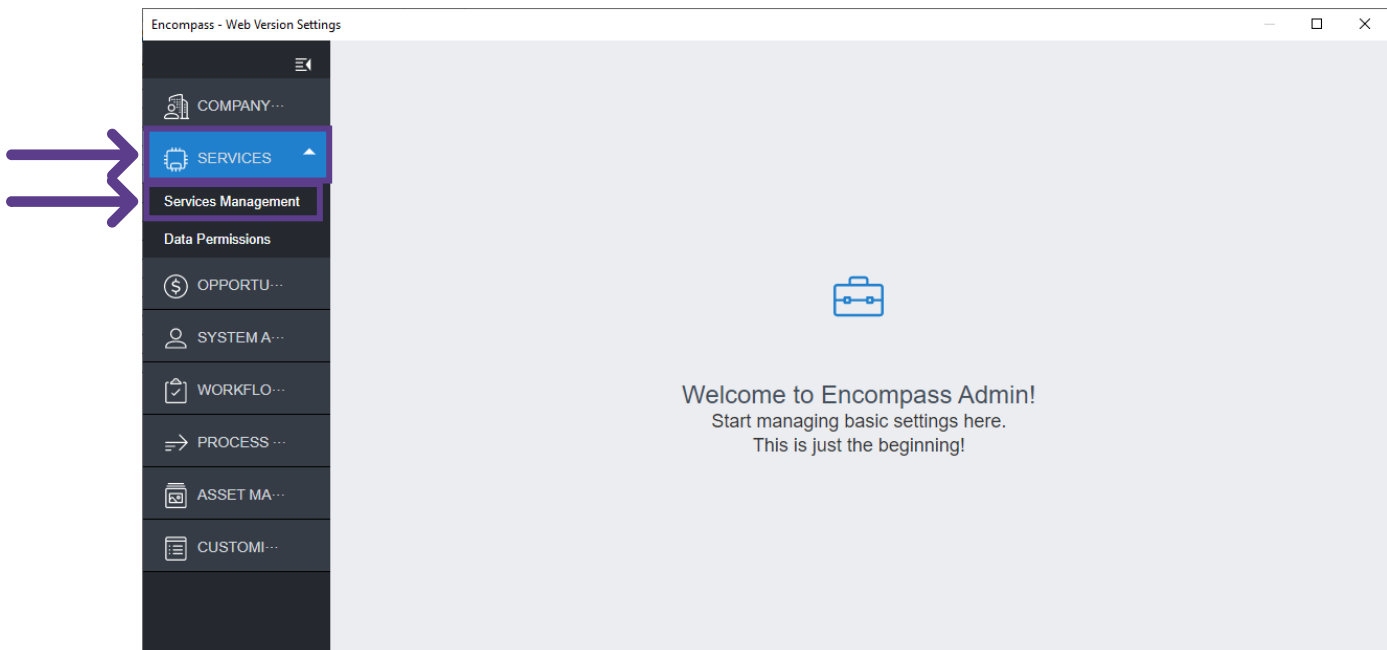
1. Start by logging in and under the Encompass menu, select Settings.



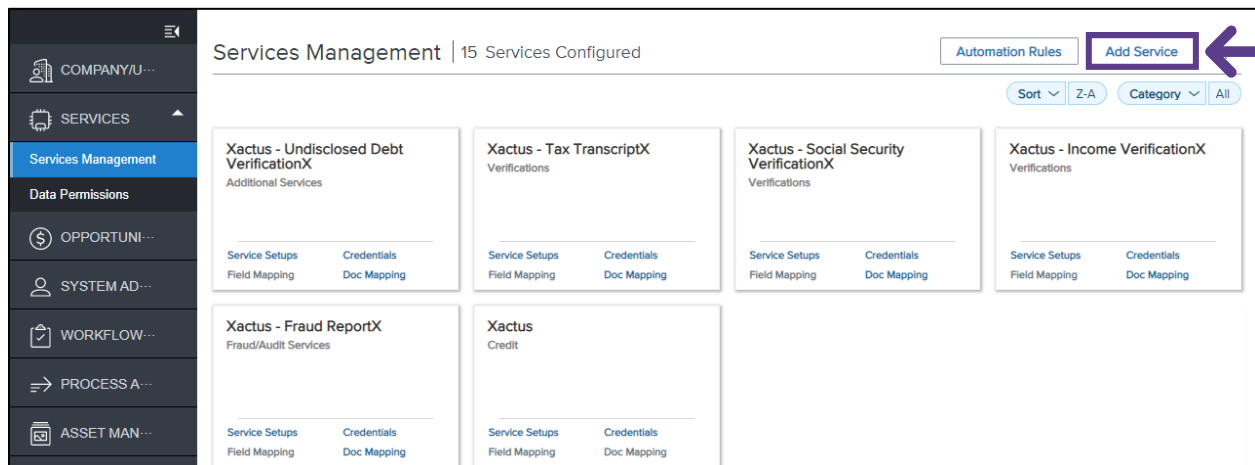
2. Then, click the link for Web Version Settings.



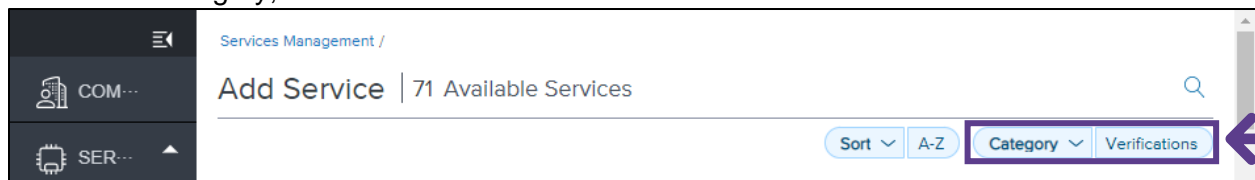
3. Select SERVICES then choose Services Management.



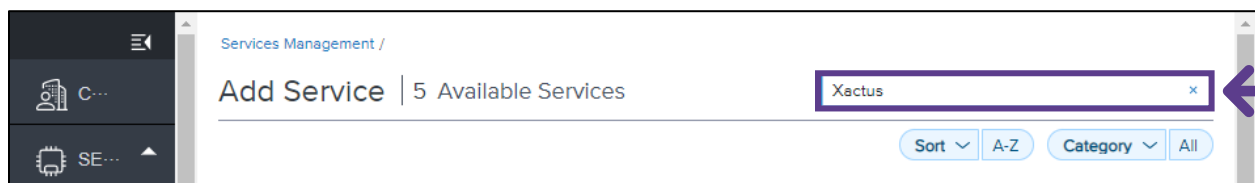
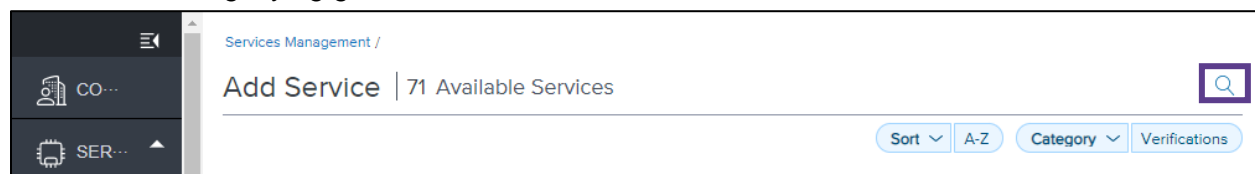
4. Next, click Add Service.



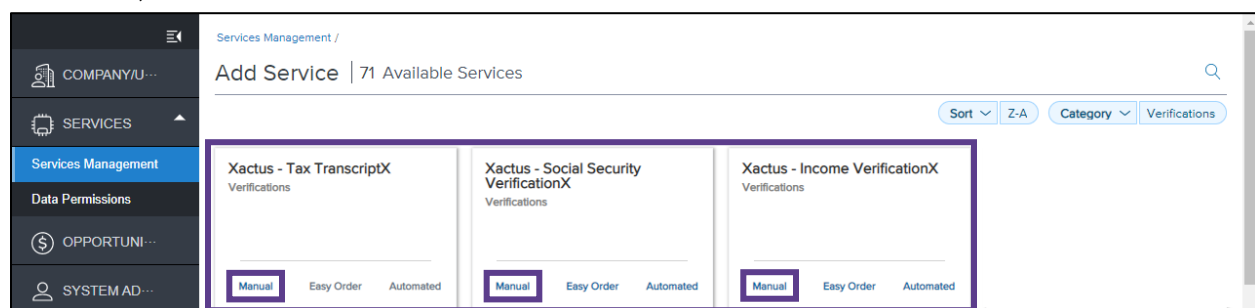
5. Under Category, select Verifications.



6. Click the magnifying glass and search for Xactus.



7. Then, select Manual next to the service needed. Services must be added one at a time.



8. First, toggle ON next to Active. Then, enter the Service Setup Name. Typically, the Service Setup Name reflects the Provider name.

Services Management / Add Service /

Add Manual Setup

Active ☒

Service Type	Evaluation Level	Provider
Verifications	Loan Level	Xactus - Tax TranscriptX

Service Setup Name

Service Setup Description

Readiness Conditions ⓘ

☒ Condition Editor ☐ Query Builder

9. Then, under Authorized Users, select Add.

Authorized Users

10. Select the Users category and click the right arrow to add them to the Selected Users section. All authorized users must be added to the Selected Users section to have access to the Provider.
Once complete, click Add.

Add Entities

Category

Organizations	↩	→
Users	↩	→
Personas	↩	→

Selected Users

Processor User (processor)	↩	✖
Xactus Test (xactustest)	↩	✖

CLEAR ALL

2/200

Cancel

Add

11. When all Authorized Users are added, click Save.

Authorized Users

Add

Delete

<input type="checkbox"/>	ID	NAME	TYPE	ACTION
<input type="checkbox"/>	processor	Processor User (processor)	User	
<input type="checkbox"/>	xactustest	Xactus Test (xactustest)	User	

Total items: 2

Cancel

Save

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