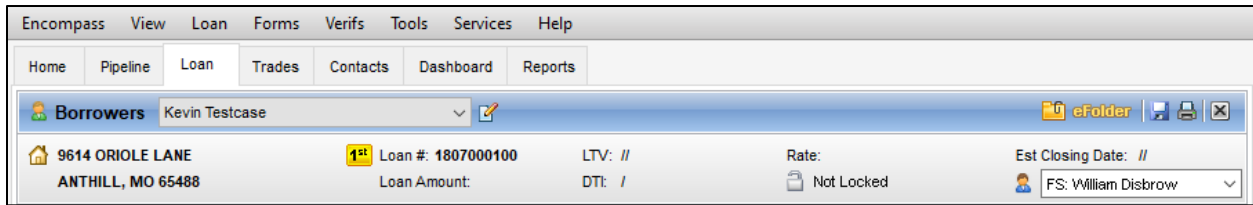
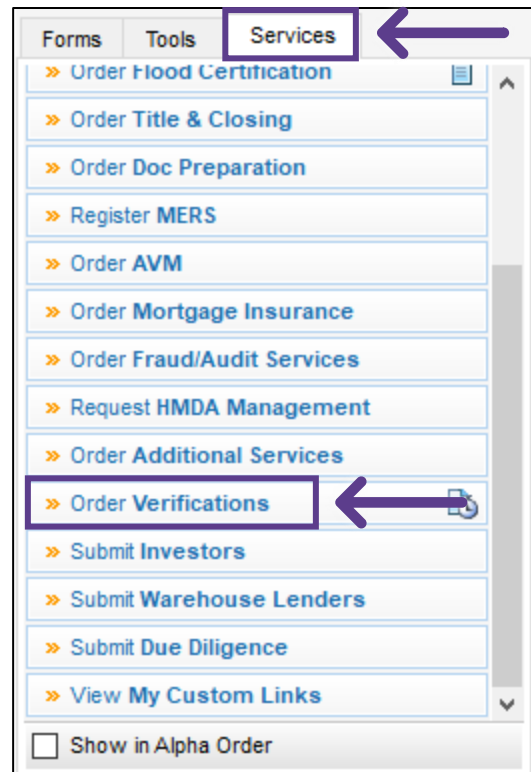


1. Start by logging in and opening the applicants loan file.



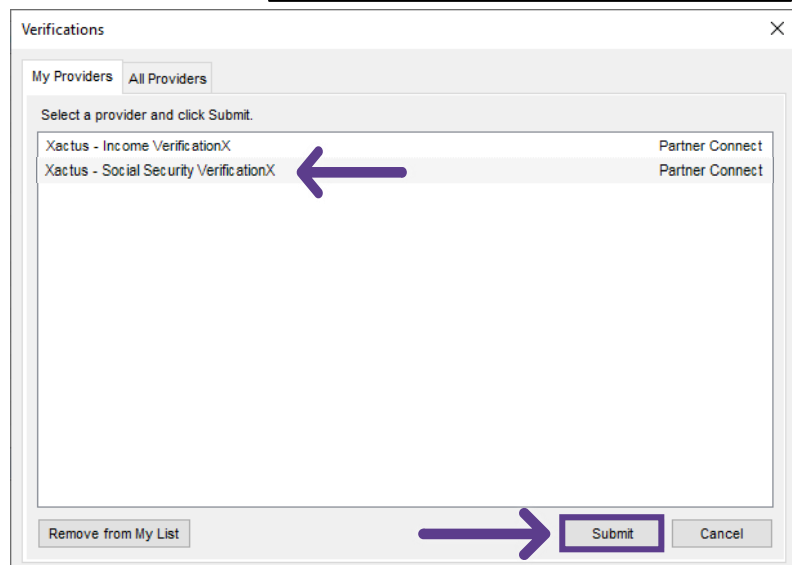
The screenshot shows the Encompass software interface. The top menu bar includes Encompass, View, Loan, Forms, Verifs, Tools, Services, and Help. Below this is a sub-menu bar with Home, Pipeline, Loan, Trades, Contacts, Dashboard, and Reports. The main area displays the loan file for Kevin Testcase. Key information includes: 9614 ORIOLE LANE, ANTHILL, MO 65488; Loan #: 1807000100; LTV: //; Rate: //; Est Closing Date: //; and FS: William Disbrow. The loan amount is also displayed.

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



The screenshot shows the Services tab in the Encompass software interface. The Services tab is selected, and a list of services is displayed. The services include: 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 service is highlighted with a red box and a red 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 with 'Verifications' and a close button. Inside, there are two tabs: 'My Providers' and 'All Providers'. The 'My Providers' tab is selected, and it displays a list of providers. The providers are: Xactus - Income VerificationX and Xactus - Social Security VerificationX. Both providers are marked as 'Partner Connect'. A red arrow points to the 'Xactus - Social Security VerificationX' provider. At the bottom of the window, there are three buttons: 'Remove from My List', 'Submit', and 'Cancel'. A red arrow points to the 'Submit' button.

- Click the Applicant(s) dropdown to select one borrower. Your applicant information will pre-populate from the 1003. Next, click Choose File to upload the SSA89 from the EFolder or local drive. Ensure the correct email address is entered for the alert. When all is complete, click Submit.

SSNV

Applicant(s)

NICKIE GREEN ▾

Loan Number/ID

2307000328

Applicant:

First

Middle

Last

Suffix

SSN

NICKIE

GREEN

123-00-3333

DOB (MM-DD-YYYY)

01-01-1999

☒

Order SSNV for this Applicant

☐

Upload SSA-89 for this Applicant

Choose File

SSA89.pdf

E-MAIL Alert:

You can choose to receive an e-mail alert when this order is complete..

(Hint: You can change the default alert setting on your Preferences page.)

Send Alert

Alert E-Mail Address

Yes ▾

xactus@xactus.com

Secondary Alert E-Mail Address

Submit

- The status will appear as Pending and an email will be sent to you when complete.

SSNV					
Applicant:	NICKIE GREEN	SSN:	123-00-3333	Order ID:	1729197
Status:	Pending				
Loan Number:	2307000328				

- Forms

Tools

Services

» 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

» View My Custom Links

☐ Show in Alpha Order

- [illegible]

\*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.

Att	Fo	Name	Description	For Borrower Pair	Type	Access	For Milestone	Status	Date
2		Social Security VerificationX (7200)	SSx_Report_SSNV	SSA89 Test	Settlement Service	AC, CL, FN, LD,...	Processing	Received	08/09/23
1		Verifications	Verifications	SSA89 Test	Settlement Service	AC, CL, FN, LD,...	Processing	Requested	08/09/23

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

09/11/2023