

Adding Documents

As you work to process your loan, you will need to add documents to complete the loan package. If you upload a document to the unassigned section, and the loan has unfulfilled conditions, a Conditions window displays to enable you to fulfill the conditions with the uploaded document.

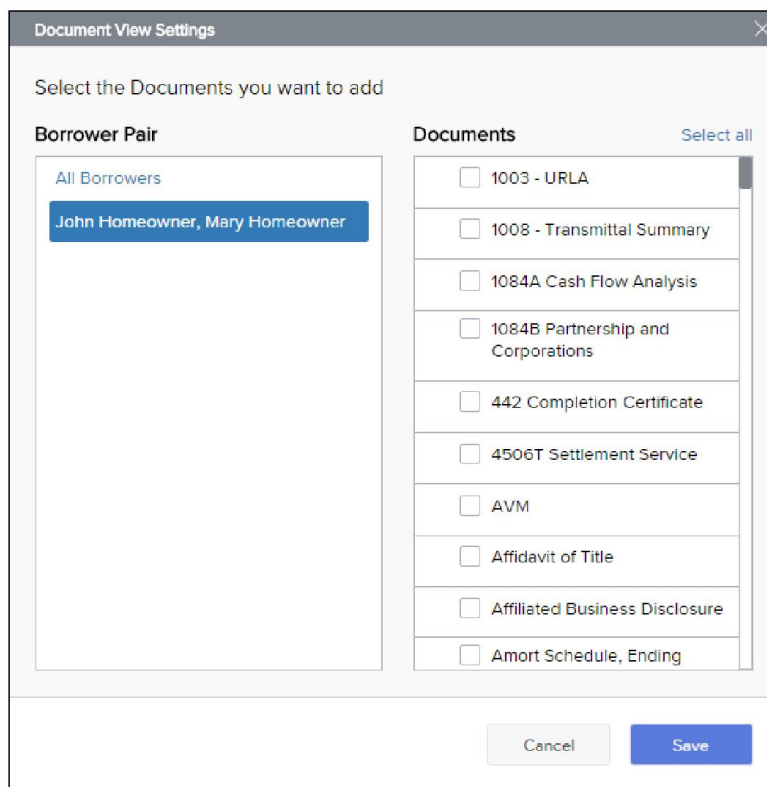
NOTE: Access to the Documents and Conditions section is controlled by the lender's Encompass administrator. The actions you are allowed to perform and the types of documents and conditions that are provided here by default are also controlled by the Lender's Encompass administrator.

To Add Documents to the Loan:

- 1 On the menu on the left, click the **Documents** link.
- 2 Click the **Add Document** button.



- 3 On the Document View Settings dialogue box, select a borrower pair and then select a document from the **Documents** list.



- 4 Click **Save** to add the document(s) to the list on the Documents page.
- 5 Drag and drop the document file to the document entry in the list, or click the **Browse for files** button to select a file to attach to the document entry. The document is now included in the Documents.
- 6 To move a document, click the **Expand Icon** (▶) to expand the document entry, and then click the **Move Icon** (📁) and follow steps three through four to select a new document entry to attach the document to.

- To delete a document assigned to a category, click the Delete (🗑️) icon.


To Assign Unassigned Documents on Upload:

- On the menu on the left, click the **Documents** link.
- Drag and drop a document to the Unassigned section, or click **Browse for files** and select the file to upload.
- Once the upload is completed, the Conditions pop up displays.
- If the document satisfies one or more conditions, select the conditions that the document satisfies.

Condition	Ready for Review
1008	<input checked="" type="checkbox"/>
Appraisal	<input type="checkbox"/>
AUS Findings	<input type="checkbox"/>

Buttons: Cancel, Notify Lender, Ok

- After selecting the conditions that are fulfilled, click **OK** to satisfy the condition with the document, or click **Notify Lender** to satisfy the condition and indicate to the lender or investor that the condition is ready for review.

NOTE: Your administrator can disable the Unassigned category which removed the option from the Documents page. Your administrator can also enable the option to download document files in their original format. If the Admin has enabled this option, you can click the **Download** icon  to download a copy of the document.