



## MINI CORRESPONDENT

### IMPLEMENTATION & PROFESSIONAL SERVICES

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Maximize your Encompass® investment.

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You have selected the leading cloud-based platform for your mortgage technology needs. It's now time to fully realize your return on investment. Our highly experienced staff is ready to help you get up and running quickly and seamlessly, assisting you in optimizing deployment, while leveraging all that Encompass has to offer, out of the gate.



*Experience  
the Teraverde  
Difference.*

### Mini Correspondent Implementation

This service is appropriate for mini-correspondent or broker customers that are 50 or less users, Single Channel Business Model such as a start-up or broker shop, without TPO, without in-house underwriting or closing or EDS setup for Closing Docs. Teraverde will provide remote support for the Limited Setting Matrix. Average timeline is 75 days from kick-off to deployment. Teraverde's fixed price includes assistance in planning, discovery, knowledge transfer and support to the client's system administrators as they configure the system. Teraverde will assist in testing, rollout, and post-deployment support for up to (16) hours for up to four (4) weeks after deployment.

While you have other implementation choices, we have the unique combination of mortgage banking experience, highly skilled technical resources, and Encompass domain expertise.

As seasoned industry executives, Teraverde has seen and worked through major challenges in the mortgage lending and banking industries. Our executives first began working with Ellie Mae in 1995 and used Encompass from its inception in 2006. Our experience, in-depth understanding of your Encompass needs, and innovative expertise allows us to accurately identify the appropriate methodology the first time, maximizing your Encompass investment.

We partner with you to provide industry insights and best practices that impact your bottom line. We've worked with over 300 mortgage lenders and banks to identify and strategically leverage their new technology, and operational processes, combined with our innovative expertise, to drive ROI.

In order to maximize your Encompass system while ensuring a smooth and seamless implementation there are five stages of the implementation process Teraverde will assist with:



### Phase 1 Introduction Phase

- The introductory phase ensures all team members on your project team, Ellie Mae and the Teraverde team connect and discuss the implementation process at a high level.
- A review of proposed implementation, configuration, training and support elements of the engagement, and expected schedule.
- Teraverde will ensure the roles of your project team, Ellie Mae and Teraverde are clearly defined in writing. We'll establish progress reporting protocols and project management protocols to ensure seamless coordination during the implementation process.
- Teraverde will outline how any potential issues or delays will be identified as early as possible, and the protocols to remediate any issues to ensure timely implementation.

### Phase 2 Discovery Phase

- Teraverde will work with your project team to understand your proposed workflow future state to ensure that configuration supports your intended business process and planned workflow. We'll evaluate any possible future requirements that should have flexibility or configurability included in the Ellie Mae base configuration and identify recommended configuration changes to the base configuration.
- We'll identify how ancillary systems will interface with and/or share data with Encompass. This includes Point of Sale systems, pricing engine, secondary market interface, general ledger, servicing systems, etc.
- We'll work together to identify and document any non-standard configuration requirements, such as construction/rehab, second lien and certain non-QM lending products.
- We'll help translate all Company requirements identified above into an Implementation Requirements document to ensure that the Encompass implementation team considers and includes all of these requirements in initial scope. This helps ensure timely delivery and avoids expensive 'scope change' costs and possible implementation delays.





CONNECTION  
ANALYSIS  
DATA  
SEARCHING  
VERIFICATION  
CODING

### Phase 3 Configuration Phase

- We'll guide your project team through the Ellie Mae provided starting configuration for Milestone Workflow, Personas, and Hierarchy with Test Users, Loan Folders, Templates (Loan Programs, Closing Costs, Input Form Sets, Document Sets, Task Sets, Data Templates and Loan Template Sets) and Funding Templates and configure as agreed in the Introduction and Discovery phases.
- We'll guide your project team through the Preconfigured Alerts, Disclosure Tracking Settings, Document Groups, Conditions, Condition Sets, Post-Closing Conditions, Post-Closing Condition Sets, eDisclosure Packages, eDisclosure Plan Codes and LO Compensation Rule, and configure as 63 business rules, 34 custom print forms, nine dashboard views, 36 reports and eight custom input forms and configure as agreed in the Introduction and Discovery phases.

### Phase 4 Testing Phase

- Assist Company in developing User Acceptance Testing plan, and ensure the UAT considers ancillary systems in use, such as a pricing engine, etc.

### Phase 5 Post Deployment Support

- Post-Implementation on-site assistance for branches, as required.
- Completion of post-implementation configuration enhancements, workflow management, etc. as required.
- Punch list and exception clearance.

# Encompass Settings Included:

## CONFIGURATION SETTINGS

\*- Included in baseline delivery; Client will configure after discovery phase.  
 ++ - Are not Included in the package. | CL- Client |

Company/User Setup		Loan Templates		eFolder Setup	
Company Information	✓	Loan Programs	✓	Document conversion	✓
Personas	✓	Closing Costs	✓	Documents	✓
Organizations /Users	✓	Input Form Sets	++	Document Stacking Templates	++
Roles	++	Settlement Service Providers	✓	Document Identification	++
Milestones	✓	Affiliated Business Arrangement	++	Conditions	✓
User Groups, as need arises	✓	Document Sets	✓	Condition Sets	++
Loan Setup		Task Sets	✓	HTML Email Templates	++
Auto Loan Numbering	✓	Data Templates	✓	WebCenter Configuration	++
Auto MERs MIN Numbering	++	Loan Template Sets	✓	Docs Setup	
Loan Folders	✓	Default Template Settings	++	eDisclosure Packages	✓
Loan Duplication	++	Tables and Fees		eDisclosure Plan Codes	✓
Alerts	✓	FHA County Limits	✓	eDisclosure Stacking Templates	++
Logs	++	Itemization Fee Management	✓	Closing Doc Plan Codes	++
Tasks	✓	Business Rules		Closing Doc Stacking Templates	++
Default Input Forms	++	Loan Folder Business Rules	++	Compliance Audit Settings	++
Condition Forms	++	Milestone Completion	✓	Secondary Setup	
Custom Print Forms	✓	Field Data Entry	++	Product & Pricing (if applicable)	✓
Print Form Groups	++	Field Triggers	✓	Funding Templates	++
Loan Custom Fields	++	Persona Access to Fields	++	Purchase Advice Form	++
Channel Options	++	Role Access to Documents	++	Auto-Lock	✓
RESPA	✓	Additional Services		Contact Setup	
Change in Circumstance Setup	++	eDocument Management	++	Email Server Settings	++
Disclosure Tracking Settings	++	Compliance Review Setup	++		
Compliance Calendar	✓	Other Settings			
Trustee List	++	Consumer Connect Admin.	✓		
Piggyback Loan Synchronization	++	Admin Tools	✓		
Sync Templates	++				
Privacy Policy	✓				
HMDA Profiles	✓				
NMLS Report Setup	✓				
Verification Contact Setup	++				

## What's Included?

SETTING	MINI CORRESPONDENT
Dedicated Implementation Consultant	Included
On-Site Consultant Services (Travel expenses are not included)	Remote
Mini Correspondent Setting Matrix	Included
Configuration by Teraverde	Included
Average Timeline to Deployment (days)	75
Post -Deployment Support (recommend)	Included (16 hrs. up to 4 weeks)
Encompass Consumer Connect	Included
Appropriate for Banker Customers	>50



*When Implementation  
Success Matters...*  
**Teraverde Delivers.**

Schedule Your Implementation Kick-Off Today.  
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