



Encompass Administrative Support When You Need It



On-Demand Encompass Administrator Support

- **Fast and Reliable Encompass Administrative Support to Supplement for Existing Staff or Outsource Your Needs:**
 - Our Encompass Team averages 12 years of experience
 - Encompass Administrators and Developers
 - Easy and responsive support portal
 - All U.S. based and all U.S. Citizens
- **On-Demand: We're Ready When You Need Help:**
 - No Long-Term Commitment or Minimum Spend.
- **Fast and Reliable Encompass Administrative Support to Supplement for Existing Staff or Outsource Your Needs:**
 - Pay a one-time fee of \$500 to gain access to the support team and our available client accessible knowledge base. This includes Encompass configuration and workflow Best Practice guides.
 - Affordable Pricing Structure with Three Pricing Tiers for Support:
 - Tier 1: Baseline System Administration
 - Tier 2: Advanced Systems Administration
 - Tier 3: Developer and Programming Support
 - See next page for Tier Details
- **SOC-2 Certified:** Teraverde is SOC-2 Certified. Our Encompass support includes Certified Encompass Administrators and Certified Encompass Developers.

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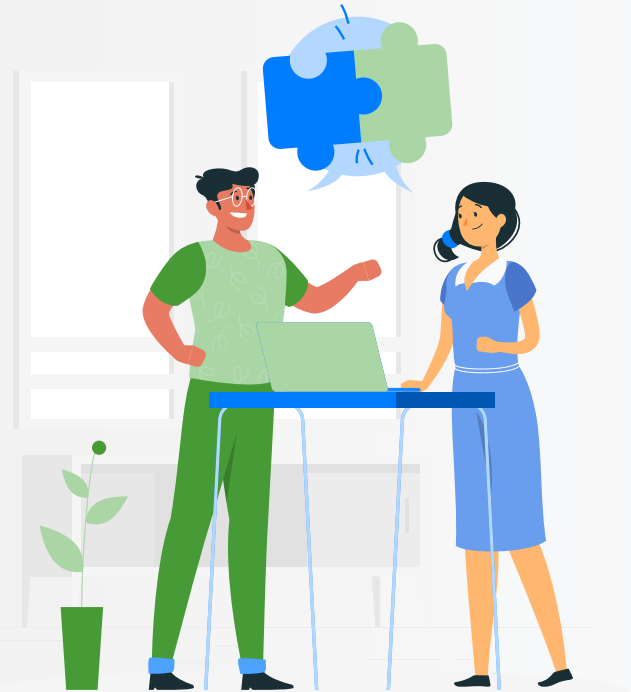
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Teraverde's Encompass Administrative Support Options:

Level 1: Baseline System Administration

Work to be performed:

- System Persona creation and maintenance to include applicable Pipeline Views, Loan, Form and Tool accessibility rules, Encompass eFolder access and functionality and Report and Dashboard applications and settings
- Routine user support activities such as answering questions for users on 'how to' within Encompass, researching exceptions, etc.
- Apply approved Change Requests to system functionality, department accessibility, department/position creation, disclosure solutions, new Form/View/Report/Process creation and enhancements, and system error, bug and problem-solving solutions and corrections
- Review planned Application Updates provided by Ellie Mae to ensure minimal system impact; submit necessary change management requests per Company Change Management procedures
- Modify, enhance or create solutions to meet business requirements as requested within Encompass (i.e. other Encompass administration duties not specifically outlined above but are part of the native Encompass System Settings)



Level 2: Advanced System Administration Team Member

Work to be performed, in addition to all items in Level 1: Baseline System Administration:

• Ellie Mae Encompass System Administration of all categories:

o Company/User Setup

- Company Information
- Services Password Management
- Personas (included in Option Level 1)
- Organization/Users (included in Option Level 1)
- Roles
- Milestones
- User Groups (included in Option Level 1)

o External Company Setup

- Company Details
- TPO Settings
- TPO Fees
- TPO Reassignment
- TPO Custom Fields
- All TPO Contact Information
- TPO WebCenter Docs
- TPO Disclosure Settings

o Loan Setup

- Loan Folders
- Loan Duplication
- Alerts
- Log
- Tasks
- Default Input Forms
- Condition Forms
- Custom Print Forms
- Changed Circumstances Setup
- Disclosure Tracking Settings
- Compliance Calendar
- Trustee List
- Piggyback Loan Synchronization
- Sync Templates

- Privacy Policy
- Zip code Setup
- HMDA Settings
- NMLS Report Setup
- Verification Contact Setup
- eFolder Setup
- Documents
- Document Export Templates
- Document Groups
(included in Option Level 1)
- Document Stacking Templates
(included in Option Level 1)
- Document Identification
- Document Training

- Conditions
- Condition Sets
- Post-Closing Conditions
- Post-Closing Condition Sets
- HTML Email Templates
- WebCenter Configuration

o Docs Setup

- eDisclosure Packages
- eDisclosure Plan Codes
- eDisclosure Stacking Templates
- Closing Doc Plan Codes
- Closing Doc Stacking Templates
- Compliance Audit Settings

o Secondary Setup

- Product and Pricing (additional features and function depend on provider)
- Secondary Lock Fields
- Lock Request Additional Fields
- Auto-Lock
- Investor Templates
- Funding Templates
- Purchase Advice Form

o Contact Setup

- Borrower Custom Fields
- Borrower Contact Status
- Borrower Contact Update
- Business Custom Fields
- Business Categories
- Public Business Contact Groups
- Email Server Settings

o Loan Templates

- Loan Programs
- Closing Costs
- Input Form Sets
- Settlement Service Providers
- Affiliated Business Arrangement Templates
- Document Sets
- Task Sets
- Data Templates
- Loan Template Sets
- Default Template Setting

o Tables and Fees

- Escrow
- Title
- HELOC Table
- MI Tables
- City Tax
- State Tax
- User Defined Fee
- Itemization Fee Management
- LO Compensation

o Business Rules

- Loan Folder Business Rule
- Milestone Completion (included in Option Level 1)
- Field Data Entry (included in Option Level 1)
- Field Triggers
- Automated Conditions
- Persona Access to Fields (included in Option Level 1)
- Persona Access to Loans (included in Option Level 1)
- Role Access to Documents (included in Option Level 1)
- Input Form List
- Loan Form Printing (included in Option Level 1)
- Print Auto Selection (included in Option Level 1)
- Appraisal Order Management
- Collateral Tracking

o System Administration

- Unlock Loan File
- Loan Reassignment
- System Audit Trail

o System Administration

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o Additional Services

- E-Document Management
 - Company Status Online
 - eDisclosure Fulfillment
 - Compliance Review Setup
 - 4506T Service
 - TQL Service
 - Appraisal Service
 - Title Service
 - Fraud Service
 - Fannie Mae Workflow
 - Valuation Service
 - Flood Service
- Advanced Reporting Metric for System Data
 - Ellie Mae Input Form Builder
 - Ellie Mae System Administration Tools
 - Includes the purchase of any 3rd Party Analytical Tools used by Teraverde for the enhancement and maintenance of the Ellie Mae Encompass360 platform
 - Active involvement in the Change Management process by providing:
 - o Communication and feedback on proposed changes
 - o Assistance to current Business Analysts, providing Business Analysis relative to Encompass, the workflow and data, on proposed changes
 - o Documentation for Rollout Procedures for implementation of changes



Level 3: Programming Support

- Development resource(s) to utilize the Ellie Mae Encompass360 Software Developer's Kit ('SDK') to build:
 - o Plugins
 - o Input Form Codebases
 - o External Programs to interact with Encompass360
 - o Websites to interact with Encompass360
- API and or SDKwork for LOS, Servicing, etc.
- Development resource(s) to build other services required
- Developer Assistance – assist Company development staff in troubleshooting and project discussions

Programming Support is done on a project basis, subject to the project scope and necessary delivery requirements. The project will consist of utilization of the Business Analyst resource(s) from Level 1 or 2, above, to facilitate the necessary business requirements for the project deliverables. The process consists of:

1. Discovery & Information Gathering
2. Workflow & Procedural Gathering
3. Functional Specification Design
4. Programming
5. Teraverde Unit Testing
6. Company UAT
7. Roll-out

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