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## Loan Connect for Title Companies

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### How to Create a NEW Account in Loan Connect

You can either create an account from the link in the email, or go directly to <https://encompassloanconnect.com> to get started.

You will get an email that looks like the below.

Follow the link provided, then click on “Create an Account” at the Login Page:

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Wed 9/18/2019 8:33 AM  
Jackie Jordan <noreply@elliemae.com>  
Loan Closing Documents for Smith Testing

To Jackie Jordan

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\*\*\* EXTERNAL EMAIL: Exercise caution \*\*\*

The Smith Closing Documents for 123 Main Street Arvada, CO are available to view on our NBH Bank website.

This is a secure, password-protected website that provides 24 hour access to the details of the loan, and the Closing document package.

**If you already have an account**, [Click here to visit the website](#) and view the Closing Docs for the Smith loan.

If you have forgotten your username or password, please follow the link(s) on the login page to recover your username and/or reset your password



Forgot your [username](#) or [password](#)?

**If this is the first time you are visiting my website**, you will need to [create a new Account](#).

Click “Create Account” and complete all the required fields (including creating a User ID and Password to access the site).  
Once complete, you will receive an email with a link to follow, to confirm your new account.

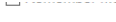
The User ID and Password you create will be used anytime you need to access my secure website to electronically sign documents.

Once logged in, you will need an Authorization Code to confirm your identity and access the Closing Doc Package.  
That code will be the **Subject Property Zip Code (all 5 digits)**.

[Click here to visit the website](#) to get started, and view the Closing Docs for the Smith loan.

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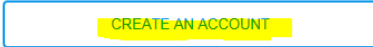
---



LOG IN

Forgot your [username](#) or [password](#)?

Don't have an account?



Complete all the required fields, then click Create an Account:

## CREATE AN ACCOUNT

Your privacy is very important to us. Help us protect your personal information by setting up a secure account for your loan application.

FIRST NAME \*

LAST NAME \*

EMAIL ADDRESS \*

CONFIRM EMAIL ADDRESS \*

PHONE TYPE \*


PHONE NUMBER \*

USERNAME \*

PASSWORD \*



CONFIRM PASSWORD \*



SECURITY QUESTION \*

ANSWER

CREATE AN ACCOUNT

CANCEL

Already have an account?

LOGIN

You will get a message telling you that you will need to verify your Email Address:

## VERIFY YOUR EMAIL ADDRESS

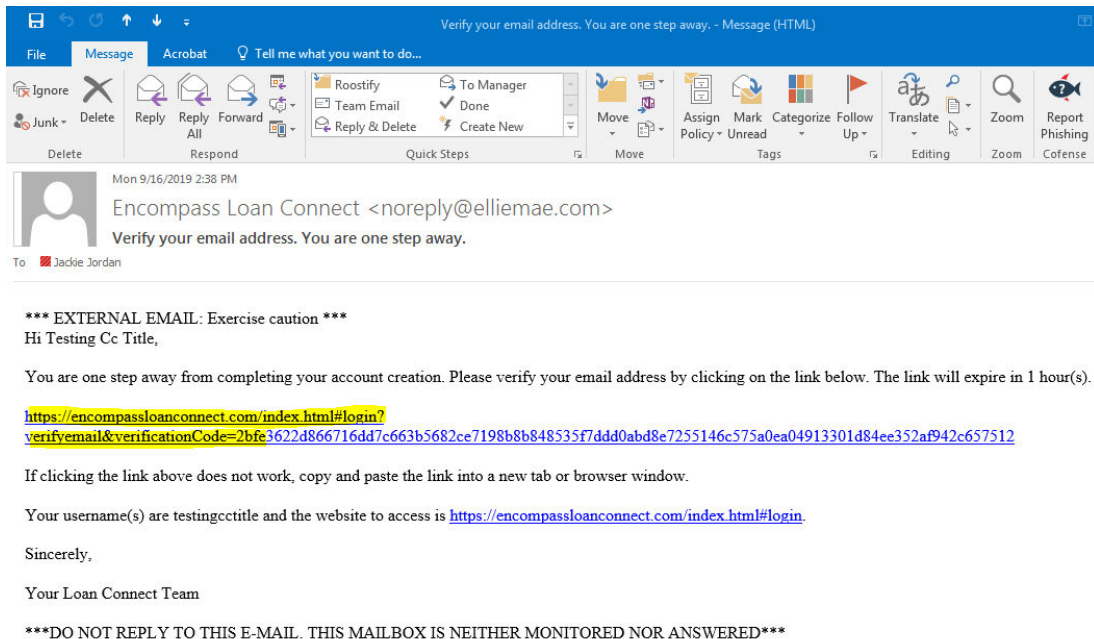
**A verification email has been sent to jackie.jordan@cobnks.com.**

Follow the instructions in the email to finish creating your account.

Did not get an email? [Send new link](#)

Already verified? [Login](#)

Follow link provided in email, to finish the account set up:



The screenshot shows an email interface with a blue header bar. The subject line is "Verify your email address. You are one step away. - Message (HTML)". The sender is "Encompass Loan Connect <noreply@elliemae.com>" with a timestamp of "Mon 9/16/2019 2:38 PM". The body of the email contains the following text:

\*\*\* EXTERNAL EMAIL: Exercise caution \*\*\*  
Hi Testing Cc Title,  
You are one step away from completing your account creation. Please verify your email address by clicking on the link below. The link will expire in 1 hour(s).  
<https://encompassloanconnect.com/index.html#login?verifyemail&verificationCode=2bfe3622d866716dd7c663b5682ce7198b8b848535f7ddd0abd8e7255146c575a0ea04913301d84ee352af942c657512>  
If clicking the link above does not work, copy and paste the link into a new tab or browser window.  
Your username(s) are testingccitle and the website to access is <https://encompassloanconnect.com/index.html#login>.  
Sincerely,  
Your Loan Connect Team  
\*\*\*DO NOT REPLY TO THIS E-MAIL. THIS MAILBOX IS NEITHER MONITORED NOR ANSWERED\*\*\*

Once the account has been verified, you will get a green message stating the account has been verified:

**Your account has been verified, please log in.**

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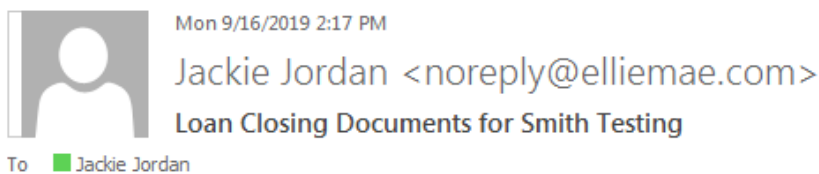
## How to Retrieve the Closing Documents from Loan Connect

Follow the link in the email sent to you.

### **PLEASE NOTE:**

In order to get access to the Closing Documents sent via email, you **MUST** follow the link in the email. You will not be able to access the closing documents until you follow this link, and enter the Auth Code.

Click the link in the email:



\*\*\* EXTERNAL EMAIL: Exercise caution \*\*\*

The Smith Closing Documents for 123 Main Street Arvada, CO are available to view on our NBH Bank website.

This is a secure, password-protected website that provides 24 hour access to the details of the loan, and the Closing document package.

Once logged in, you will need an Authorization Code to confirm your identity and access the Closing Doc Package.

That code will be the **Subject Property Zip Code (all 5 digits)**.

[Click here to visit the website](#) and view the Closing Docs for the Smith loan.

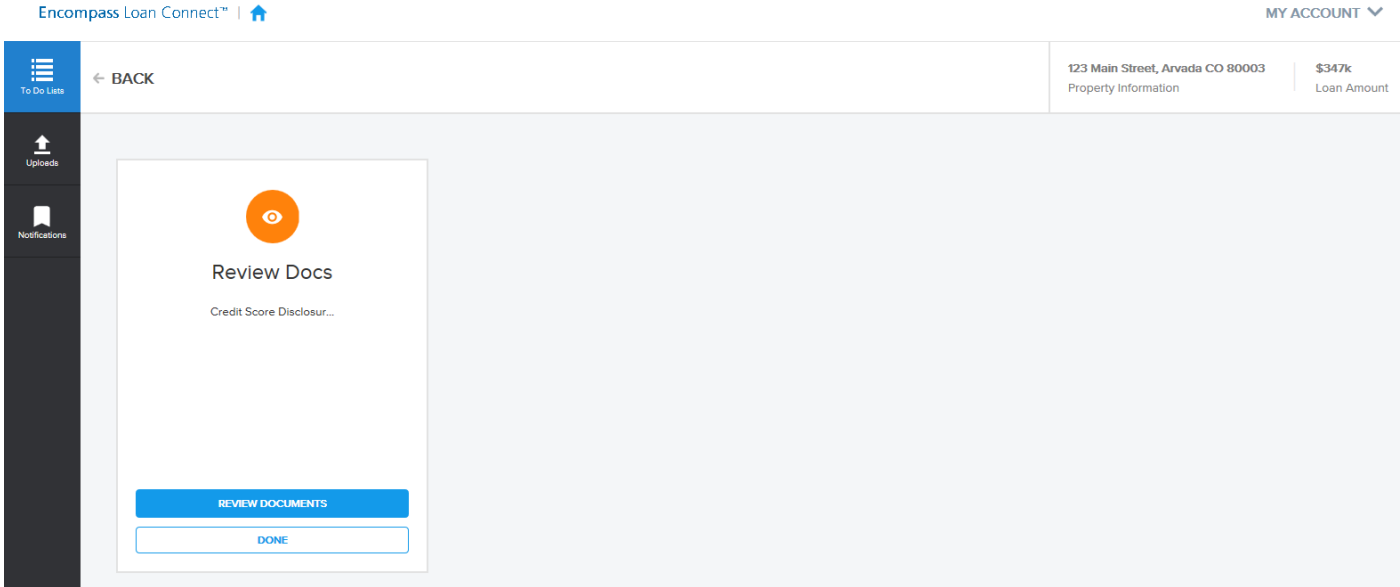
Once logged in, you will be asked for the Auth Code.

This will be the **SUBJECT PROPERTY ZIP CODE:**

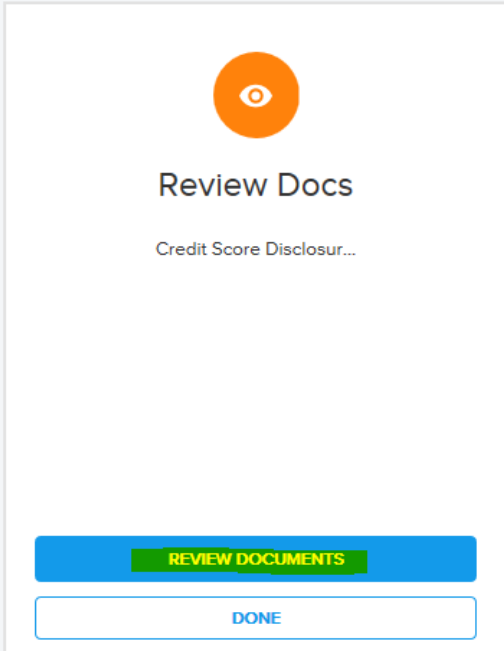
ENTER AUTHENTICATION CODE

SEND

This will take you to the Encompass Loan Connect Home Page – “To Do Lists” tab. Docs show up under a Review docs heading



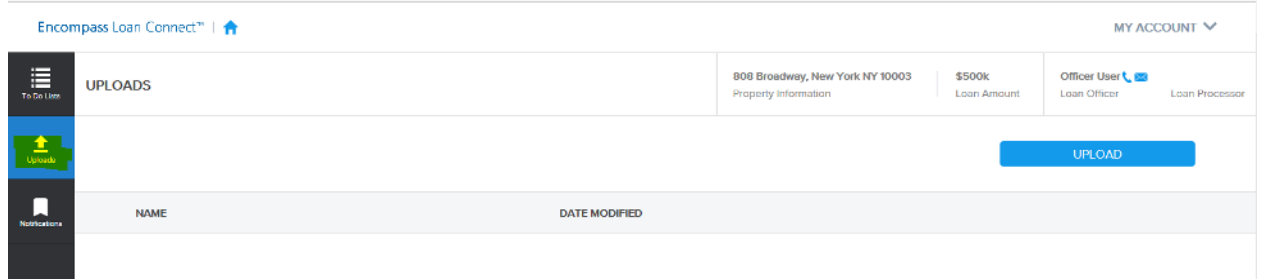
Click "Review Documents" to view, save or print the Closing Documents. The docs will open in separate tab (or page), and may take a moment to load.



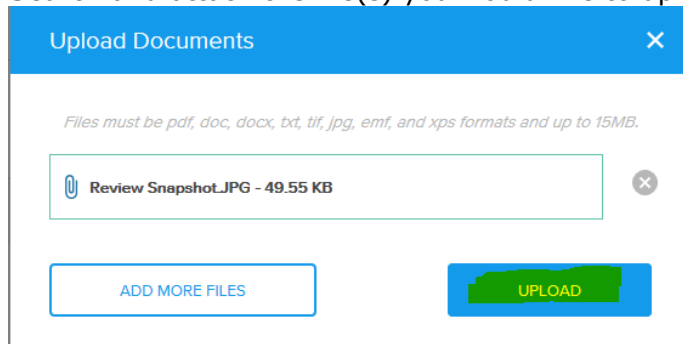
## How to Upload Executed Closing Documents to Return to NBH Bank

Log in to <https://encompassloanconnect.com>

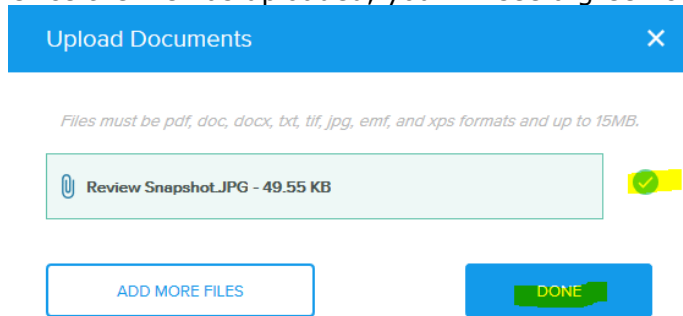
Pick the loan you are working on, then go to the Uploads Section:



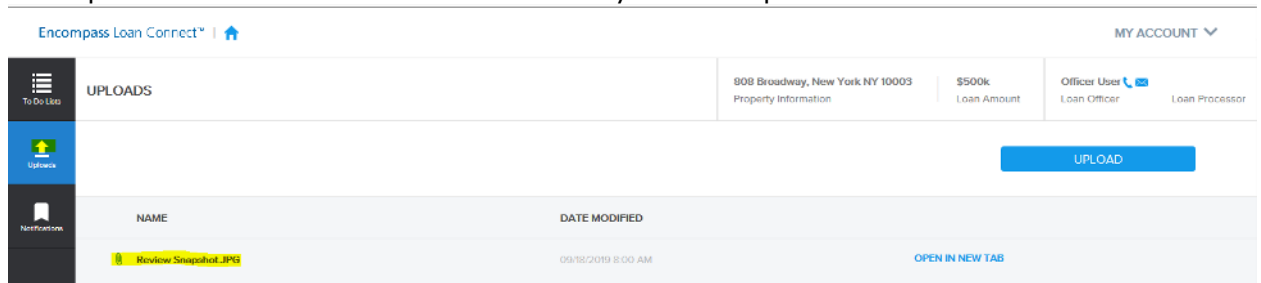
Click the Upload Button in the upper right hand corner.  
Search and attach the file(s) you would like to upload, then choose Upload:



Once the file has uploaded, you will see a green checkmark. Click the Done Button:



The Uploads section will show all documents you have uploaded for the Loan File:




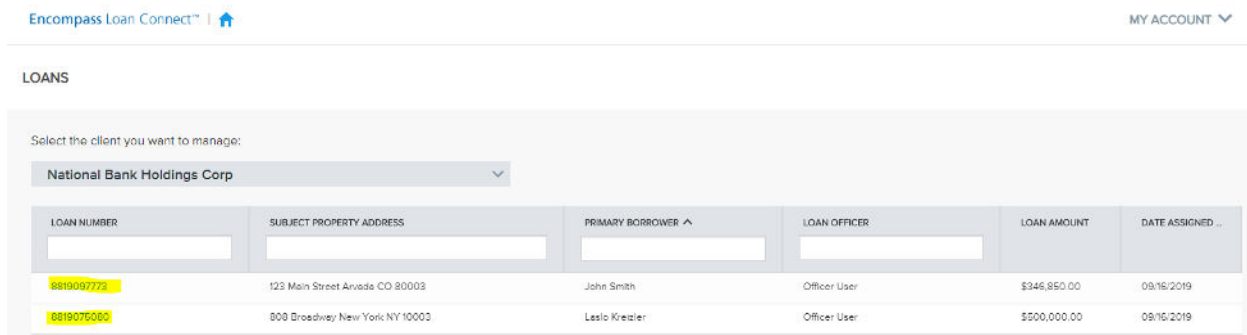
## Miscellaneous Notes


Static link to use: <https://encompassloanconnect.com>

You can use the above static link to see all the loans you have worked on, once the account has been created **AND** the packages have been assigned by following the unique link in the email and entering the Auth Code (subject property zip code).

You **CANNOT** use the above static link to view new loan packages UNTIL the unique link in email has been followed and the Auth code entered (subject property zip code). Once the Auth Code has been entered, all documents for that loan can be seen using the static link to login

Here is a snapshot of the Home Page (clicking the  icon)



Encompass Loan Connect™ |  MY ACCOUNT ▾

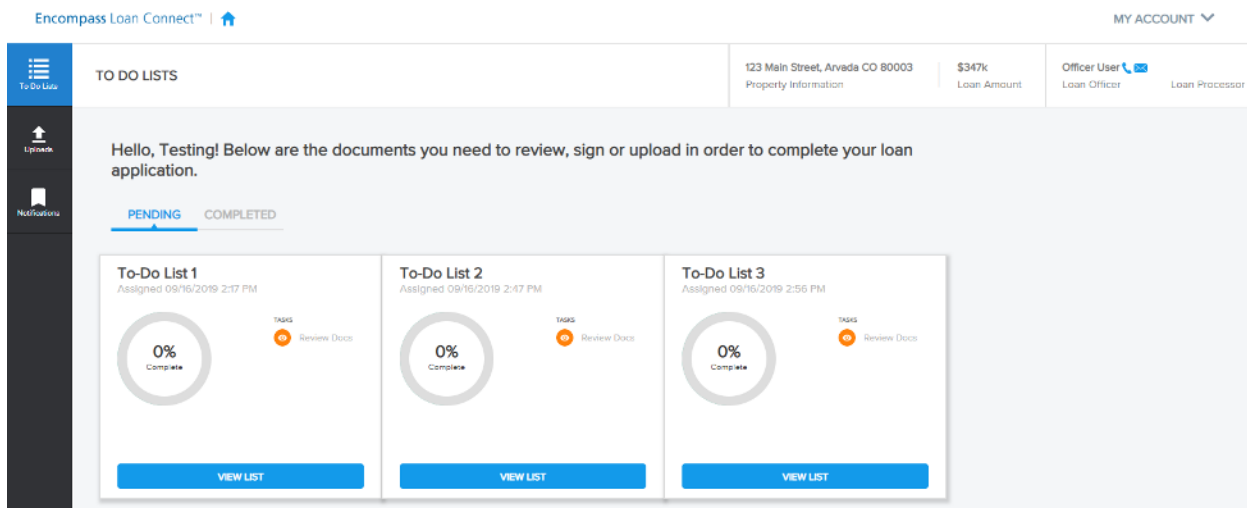
LOANS


Select the client you want to manage:


National Bank Holdings Corp ▾

LOAN NUMBER	SUBJECT PROPERTY ADDRESS	PRIMARY BORROWER ^	LOAN OFFICER	LOAN AMOUNT	DATE ASSIGNED ...
8819097772	123 Main Street Arvada CO 80003	John Smith	Officer User	\$346,850.00	09/16/2019
8819075000	800 Broadway New York NY 10003	Leslo Krezler	Officer User	\$500,000.00	09/16/2019

Here is a snapshot of a loan with Multiple Doc sets (reflect as To-Do Lists)



Encompass Loan Connect™ |  MY ACCOUNT ▾


**TO DO LISTS** 123 Main Street, Arvada CO 80003  
Property Information \$347k  
Loan Amount Officer User   
Loan Officer Loan Processor

Hello, Testing! Below are the documents you need to review, sign or upload in order to complete your loan application.

**PENDING** COMPLETED

**To-Do List 1**  
Assigned 09/16/2019 2:17 PM


0% Complete

TASKS  Review Docs

[VIEW LIST](#)

**To-Do List 2**  
Assigned 09/16/2019 2:17 PM


0% Complete

TASKS  Review Docs

[VIEW LIST](#)

**To-Do List 3**  
Assigned 09/16/2019 2:56 PM

0% Complete

TASKS  Review Docs

[VIEW LIST](#)