

CHANGING AN EMAIL ADDRESS AND RESENDING DISCLOSURES.

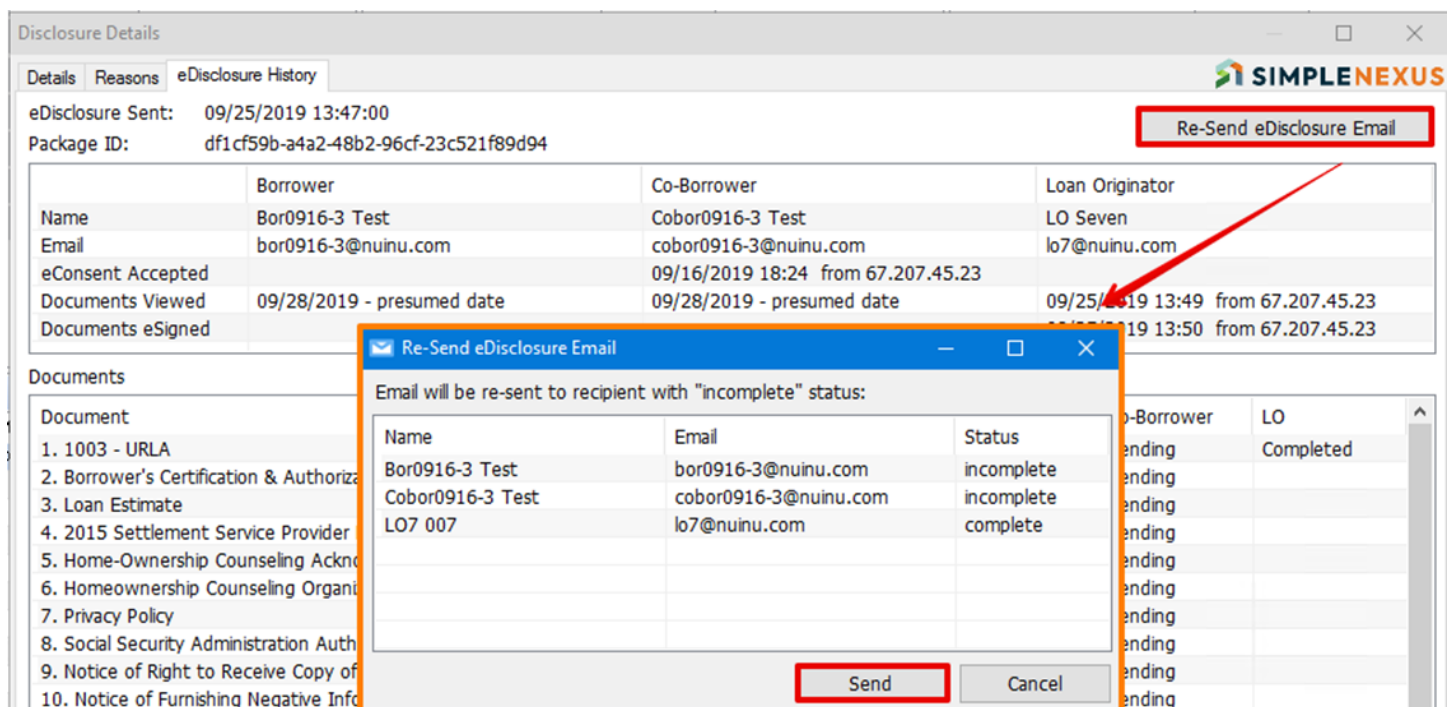
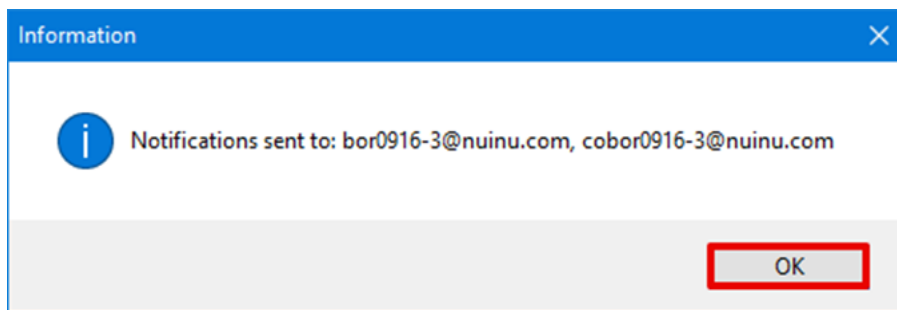
Good News! SimpleNexus now allows for an email address change after initial disclosures have been sent. This will permit us to resend the initial disclosure package to the borrower(s) for eSignature without having to exclude from the timeline or restart a file. The initial disclosure date will remain the same.

Follow these steps:

Step 1: Enter and save the correct email address in Encompass.

Step 2: Under Disclosure tracking resend the package by clicking on the **Re-Send eDisclosure Email** link. Go to the **Disclosure Tracking** screen under **Tools, eDisclosure History** tab from within the loans 'Disclosure Detail's section, and from that page, on the upper right will be a button labeled **Re-Send eDisclosure Email**. Selecting this button will generate a popup window showing the name, email address, and Disclosure status for each borrower/co-borrower on the loan. By clicking on the **Send** button within that popup, will send the request for action to be taken for those showing an incomplete status.

After pressing **Send** a status window will display, confirming which email address(es) will receive the Disclosure reminder email.



Step 3: Put in an **Encompass Help** ticket, requesting that a SN Account Admin reset the disclosure package within SN.

The screenshot displays the Encompass Help interface. On the left, there is a sidebar with a list of alerts and messages, including 'eConsent Not Yet Received', 'Move Loan to My Pipeline folder', 'Compliance Review - Had Warning', 'Loan Estimate Expires', 'REG-B Alert', 'AUS Data Discrepancy Alert', and 'Key Pricing Fields'. Below this list are tabs for 'Forms', 'Tools', and 'Services'. The 'Forms' tab is selected, showing a list of forms including 'Encompass Help', 'Encompass Help -Old', 'Energy Efficient Mortgage Calculation', 'Exception Request Form', 'Exception Request -NEW', and 'FACT Act Disclosure'. The main area of the interface is titled 'Encompass Help' and contains a form titled 'Create a New HelpDesk Request for assistance'. The form has a 'Request Type' dropdown menu set to 'Need Help'. Below this is a text area for 'Request Notes' containing the text: 'borrower email address error - SN Account Admin to reset package in simple nexus. Borrower email address has been corrected and resent edisclosure email through Encompass.' A note below the text area states: 'NOTE: The Submit Request button will not work until you have described the Request'. At the bottom of the form are two buttons: 'Submit HelpDesk Request' and 'View Previous Requests'. The 'Submit HelpDesk Request' button is highlighted with a red rectangle.

Alerts & Messages	
eConsent Not Yet Received	05/11/22
Move Loan to My Pipeline folder	05/11/22
Compliance Review - Had Warning	05/11/22
Loan Estimate Expires	05/23/22
REG-B Alert	06/10/22
AUS Data Discrepancy Alert	06/13/22
Key Pricing Fields	06/13/22

Forms Tools Services

Encompass Help

Encompass Help -Old

Energy Efficient Mortgage Calculation

Exception Request Form

Exception Request -NEW

FACT Act Disclosure

Encompass Help

Create a New HelpDesk Request for assistance

Request Type: Need Help

Provide a DETAILED Description of the Error or Issue and what you were expecting to happen.

Request Notes: borrower email address error - SN Account Admin to reset package in simple nexus. Borrower email address has been corrected and resent edisclosure email through Encompass.

NOTE: The Submit Request button will not work until you have described the Request

Submit HelpDesk Request View Previous Requests

HelpDesk is for Errors / LOSTeam is for Suggestions or Ideas.

Once the SN Account Admin resets the package the borrower(s) and MLO will receive new email links prompting them to eSign the disclosure package.

Note: These steps will only apply when there is a typo in an email address, or the borrower has multiple email addresses associated with SimpleNexus.

Please let me know if you have any questions. Thank you