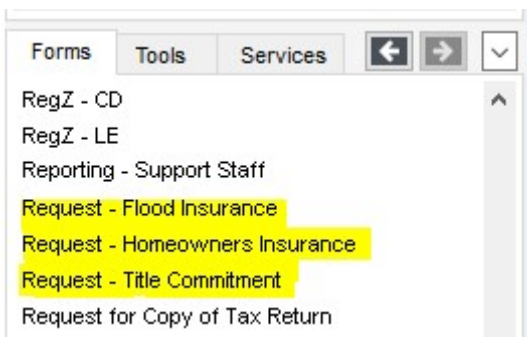


Griffyn Vaughn

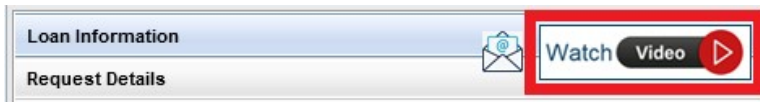
From: Errin Duty
Sent: Wednesday, July 5, 2023 9:48 AM
To: Gabby Silva; Kody Honegger; Austin Dick; Bill Woods; Griffyn Vaughn
Cc: Nancy Woods
Subject: How to order Homeowners Insurance
Attachments: HOI Request - Purchase - Policy Number

How to Request:

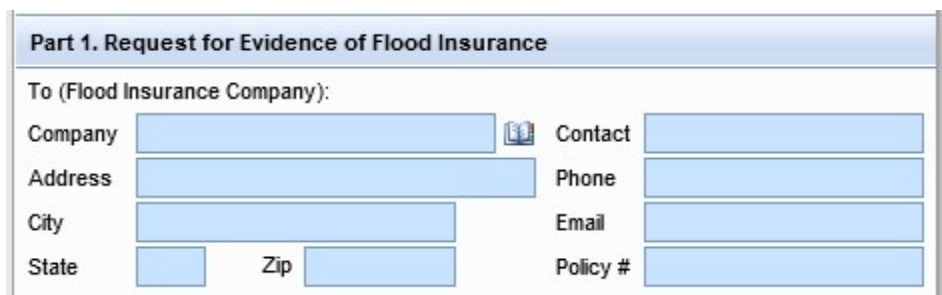
Open your loan in Encompass. Under the **Forms** tab (☒ Show in Alpha Order ☒ Show All), click on the appropriate Request page (Flood, Homeowners or Title Commitment).




Each request page has its own short instructional **Watch Video**



1. Complete all highlighted fields in each section of the request form.



- Some fields like contact info will be populated from the file contacts page, double check the correct contact information is entered before making the request.
 - Business Contacts - You can click the **Address Book** icon  (from the loan form, or the File Contacts tool) and select existing business contacts to add to the file contacts for the loan.
- State Specific Mortgagee Clause will automatically populate

2. **Special Instructions** section will already include detailed policy requirements. If additional instructions are needed, they can be manually added in the **Body of the Email Request** section.
3. Hit the **Print to eFolder** tab. A copy of the request page will populate to the corresponding eFolder placeholder .
4. Hit the **Preview Email** tab to preview the email that will be sent to the listed contact.
5. Hit the **Send Request Email**.
 - The email request will always include the current user and the loan processor assigned to the file.
6. **Date & Document Tracking** on the Loan Summary page will automatically update with the service requested date.

Date & Document Tracking			
Important Dates	Ordered / Requested	Received	Expires
Flood Ins. Request	//		
HOI Request	09/21/2022	//	
PMI Cert	//	//	

****Sample emails attached.**



Errin Duty

Licensed Loan Officer Assistant

NMLS #2155059, Mortgage Loan Originator

O: (918) 877-7509 | M: (918) 269-3307

E: Errin.Duty@usmortgage.com

www.usmortgagesw.com/nancy

8282 South Memorial Drive, Suite 401

Tulsa, OK 74133

Branch NMLS #1191767



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