Encompass Persona Based Workflows

Create greater efficiencies with clearly defined workflows. To effectively use Encompass, employees traditionally follow clearly-defined workflows. Workflows are stages of work, or milestones, which identify certain loan tasks to be completed.

Encompass Persona Based Workflows clearly document and define role-based job duties and best practices for Encompass users unique to your organization. Not only does the documentation set clear expectations for each role, it also can increase confidence in employees referencing them, helping to set them up for greater success in their roles.

Encompass Persona Based Workflows provide your organization with the ability to define, align, and integrate your existing procedures with the Encompass system customizations unique to your business. The documentation offers a strategic blend of step-action guidance and real-time compliance impacts associated with a persona’s role within the life of loan process. The documented workflow provides a useful guide to staff, setting clear expectations for job duties while also addressing any compliance concerns.

**Documented personas include:**

- Loan Originator
- Loan Coordinator
- Disclosure Specialist
- Loan Processor
- Underwriter
- Closer
- Funder
- Post Closing

**What can you expect from Encompass Persona Based Workflows?**

The documentation, customized to your organization, delivers:

- A blend of narrative and illustrative content, unique to each job role
- Clearly defined step-action procedures for each job role
- Recognizable iconography that alerts the user for additional impacts at each milestone

**Upgrade your organization’s performance**

Using the Encompass Persona Based Workflows can have significant performance impacts on your organization.

- Leverages industry guidance and best practices to create greater workflow efficiency through Encompass
- Offers a reference point to support consistent execution of workflow requirements as compared to traditional employee training
  - Reduces the need for constant on-floor support during initial Encompass implementation
- Helps to prepare for regulatory audits by defining compliance policies down to click-by-click guidance for front-end operations staff
  - Provides technical guidance per industry requirements

Reach us at 800-848-4904 or sales@allregs.com to learn more.

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