Going Paperless

Ideal for clients who wish to take their system to a paperless environment while reviewing all other aspects of their system setup. Customers who purchase the Paperless package will be assigned an Ellie Mae consultant to analyze their Encompass instance for improved configuration for image processing.

Service Scope

Your Ellie Mae® consultant will work with you to perform the following:

1. Review all personas to ensure users’ ability to use the eFolder.
2. Review eFolder setup to determine if all the documents and eDisclosures and closing documents are identified, including:
   - Document placeholders
   - Grouping of the documents
   - Stacking orders
   - Conditions and condition sets
   - Post-closing conditions and condition sets
   - HTML templates are set accordingly
3. Review all other Administrative settings.
4. Review all rules associated are correct, including:
   - Persona access to loans
   - Role access to documents
5. Assist in testing the features and tweaking any changes.
6. Provide documentation on recommendations.

Service Delivery

Typically five days on-site/remote. Actual delivery time-line will be based on scope of work.

Price

Pricing varies based on the scope of your project. Contact your relationship manager for more information.