Policy & Education Manager

Use one dashboard to ensure your board, management and employees stay educated and adhere to required policies and procedures.

Take the smarter road to organizational compliance

Ellie Mae’s Policy & Education Manager™ is a comprehensive learning and content management system that will help keep your employees compliant with current regulations, agency guidelines and your organization’s best practices.

Easily control, customize and manage education from one dashboard

• Create and manage user accounts
• Design specific learning paths based on role, topic or function
• Develop assessments to track comprehension and course completions

Trust the technology that’s trusted by leading lenders

Ellie Mae’s Policy & Education Manager gives you access to:

• Policy & Procedure Manuals with Knowledge Check
• AllRegs® Education Package
• Continuing Education Library
• Custom-branded Education Management Portal
• Policy & Education Consultant

Benefits

• Ensure your company adheres to policies and procedures
• Ensure compliance on an organizational level
• Keep employees educated and informed
• Automate and track employee learning
• Stay current with agency guidelines
• Make sure employees follow specific best practices

Bring the whole company up to compliance — and stay there

Policy & Education Manager is part of the Ellie Mae Compliance Management System™ that can help you comply with CFPB requirements and:

• Enforce policies & education
• Manage vendors
• Track/resolve customer complaints

Reach us at 1-888-955-9100 or sales@elliemae.com to learn more about Ellie Mae’s Policy & Education Manager.
Two options for total compliance

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<tr>
<th>Essentials Package</th>
<th>Premium Package</th>
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<tbody>
<tr>
<td>Provides education and verification for mortgage-related Federal Consumer Financial Laws and regulations outlined in the CFPB Examination Guide.</td>
<td>Provides comprehensive mortgage-related learning and validation included with the Essentials package with increased flexibility and customization capabilities.</td>
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<tr>
<th>Essentials Learning Library</th>
<th>Custom-Branded Learning Portal</th>
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<td>Leverage a subset of the AllRegs by Ellie Mae Education Program, supporting the mortgage-related topics listed in the CFPB Examination Guide.</td>
<td>Customize the learning experience with your company logo and a custom URL.</td>
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<th>NMLS-approved Continuing Education</th>
<th>Premium Learning Library</th>
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<td>Available for individual purchase online.</td>
<td>Access the complete AllRegs by Ellie Mae Education Program and eLearning modules for mortgage industry professionals.</td>
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<th>Essentials Policy Manual &amp; Procedure Templates Library</th>
<th>Premium Continuing Education Library</th>
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<td>Customize with your company name, logo and shared copyright notice. Track employee progress with knowledge checks and acknowledgement forms.</td>
<td>Employ our complete offering of self-paced NMLS-approved courses. Credit Banking and Reporting fees course included at no additional charge.</td>
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<td>Access our complete library of customizable policy manuals and templates. Track employee progress with knowledge checks and acknowledgement forms.</td>
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Both Packages Include:

**Learning Portal Management**
Manage users, load and manage custom content and create learning paths for specific groups of employees. Effortlessly link to external shareable content, web links, articles and video and audio files.

**Comprehensive Reporting**
Easily track employee progress by user, group or course. Have reports generated automatically and sent to you daily, weekly, monthly or annually. Use an integrated SQL editor function to easily query data.

**User Job Aids**
Give managers and users answers to frequently asked questions.

**Administrator Training & Technical Support**
Reinforce basic administrative tasks using eLearning modules created specifically for policy and education managers. Ensure managers know how to manage users, upload learning content, create courses, classes and notifications and generate reports.

**Ellie Mae Learning Consultant**
Receive guidance on education and compliance initiatives, provide recommendations, and update you on learning trends within the mortgage industry.