

eBook



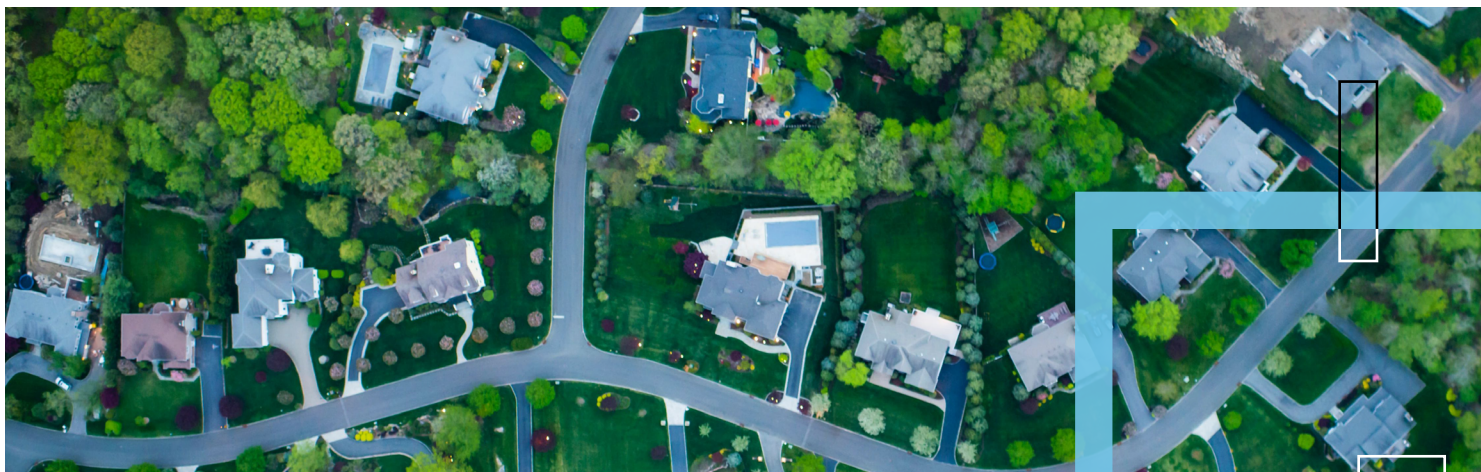
Learn best practices for migrating to Encompass Partner Connect



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Introduction



Our partners have been working diligently to rebuild their legacy service offerings to Encompass Partner Connect™ (EPC) to build more robust integrations that provide our lenders with more enhanced capabilities and functionality than ever before.

Today we have more than 150 partners across all categories, from appraisal to title to flood, that are available on EPC and offer many benefits. The enhanced integrations built on EPC are ready for you to start taking advantage of today, leverage this playbook to learn best practices, help with your migration strategy and take advantage of all the benefits.

Legacy services are no longer being enhanced and will be retired. Don't wait and make sure you have started your EPC journey by migrating to your partners enhanced EPC services.

¹<https://www.jobmonkey.com/mysteryshopping/what-is-mystery-shopping>

What is Encompass Partner Connect (EPC)?

Encompass Partner Connect™ (EPC) is the platform our partners use to implement their API based integrations, which enables lenders to leverage powerful and intelligent service ordering workflows in Encompass by ICE Mortgage Technology. All partners on the network are required to build on EPC to be available on the web version of Encompass.

EPC benefits for lenders

Automation

- Ability to leverage 1-click service ordering and Automated Service Ordering (ASO) when applicable
- Customizable milestone-based service ordering through unlimited access to business rules
- Easily access out of the box user authorization and credential delegation users

User Experience

- Enhanced service ordering configuration management through modern, easy to use UI
- Data and documents are automatically imported into the loan file – i.e., the lender no longer has to go into the service provider's portal to fetch documents
- Ability to access web version admin settings natively in the desktop version, providing admins with a single-entry point to manage service providers

Access and data security

- Capability to control and designate where to route specific documents of the service provider orders – i.e. document mapping; for ex: send appraisal reports to one group and invoices to another group in your organization
- More secure borrower data entitlement only allowing partners access to data that is relevant for their specific integrations i.e. partners must be granted access to update loan amount, SSN, or other critical loan fields
- Providers ends the ability to identify the loan data and fields accessed by integrated service providers when services are ordered, providing admins with greater visibility and control of the service ordering process

Best practices for transitioning to EPC

Migrating your available service providers to EPC is important for continued access to certain services on the Encompass Partner Network, and it will be a requirement to use some features in Encompass, like MI Center. It's critical to have a plan to migrate your services efficiently and without disruption. We've put together some key things to think about when developing your plan. Your CSM is also available to help you if needed.

- **Identify EPC Partners:** Review current integrated ICE Mortgage Technology partners that you use today and determine which partner services are available on EPC. View which partners are available on EPC [here](#)
- **Engage EPC service providers:** Talk to service providers that are on EPC about the benefits of the new integration and how to get set up a the new service
- **Determine migration strategy:** Start transitioning services that are easy to transition first, like flood for example
- **Leverage partner EPC user guides:** Have your system admin leverage partner documentation to set up new EPC integration
- **Train your users:** Provide your users with partner user guides/videos to help with ordering of the new service in Encompass
- **Identify cutoff date of ordering of old service:** To ensure a smooth transition, ensure your company identifies a cutoff date of ordering the partner's legacy service
- **Keep track of migration progress:** Make sure you are continuously tracking which users are ordering through new services and which are not so you can continue to drive the benefits
- **Turn off ordering of legacy service through Encompass:** Once you have identified a cutoff date of ordering the legacy service, ensure you turn off the old service, so orders don't continue to come through both integrations. Please leverage instructions [here](#) on how to remove legacy service providers for your users.



Migration checklist



Have you identified which of the partner services you use are available on EPC?



Have you obtained user guides/set up guides from your EPC partners?



Have you engaged with your EPC service providers?



Have you trained your users with help from your partners?



Have you determined your migration strategy?



Have you identified a cutoff date of ordering partner legacy service?





Have you engaged your system admin to help with the setup of the new EPC services?



Are you keeping track of EPC migration status?

Common objections & responses

 Objection	 Response
<p>I'm not on the web version of Encompass today</p>	<p>EPC services are cross compatible with desktop and web versions of Encompass.</p>
<p>I'm concerned it will disrupt my current service</p>	<p>Setting up a new EPC service will not disrupt your current service. Users will be able to start using the new integration as soon as the system admin has completed the set up.</p>
<p>I don't have time to set it up</p>	<p>Set up is easy and can be done by your system admin going into the web version of Encompass and setting up the new integration. We are ready and available to help with the set up as well.</p>
<p>I prefer to remain on the old integration</p>	<p>Partner Connect Services will allow your users to take advantage of improved features. It will ultimately allow you users to migrate to the web more seamlessly when that time comes. Legacy services are no longer being enhanced and will be retired.</p>
<p>I heard there is a cost to transition to EPC</p>	<p>There is no cost associated with transitioning to EPC.</p>

The ICE advantage

ICE Mortgage Technology® is part of ICE (NYSE: ICE), a global data, technology and market infrastructure company that designs, builds and operates digital networks to connect people to opportunity. Backed by ICE's global resources, we offer a truly differentiated digital platform that provides straight-through processing for a more comprehensive end-to-end workflow than any other provider in the market. We reach almost every mortgage in the U.S. by combining the native automation of Encompass® with the e-collaboration and e-recording capabilities of Simplifile®. Ultimately, our technology enables people across the industry to focus on personal connections when they need them most, and support borrowers for a better journey of homeownership.



For more information: icemortgagetechnology.com

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