email – vedprakash75@gmail.com

Phone - +1-3362524985

LinkedIn - https://www.linkedin.com/in/vedprakash75/

Website – https://qualityexcellence.info

Details:

Missing Disclosure Tracking entries or Blank Disclosures

Solution Details:

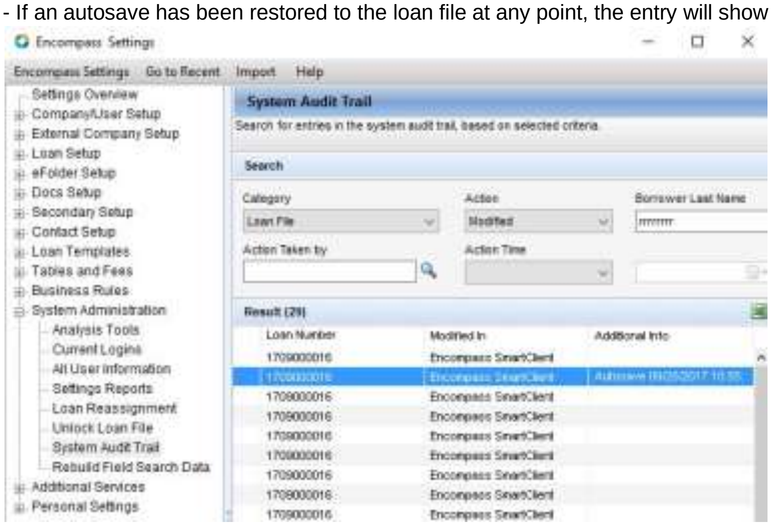
Below are some possible reasons under which you may encounter Missing Disclosure Tracking entries:

1) Loan file restoration from previous Autosave.

When a user edits a loan file in Encompass an **autosave** is periodically generated and kept, application side. This autosave is generated to maintain the user's progression in the loan file, in the event that the user loses their connection to Encompass through network or application issues.
If a user experiences a connection loss, **next time** the same user logs into Encompass and opens the loan file they were working in, before the loss of connection, the user will be prompted if they'd like to **restore** the data in the loan file from their autosave.
If the user selects, "**yes**", the loan file is **reverted** back to the state it was in when the autosave was recorded.
If the user selects, "**no**", the application discards the autosave and the loan maintains its state from the last committed save.

The autosave recovery option will be available to the disconnected user upon **first re-entry** attempt into the file. This recovery option can be immediately selected or it can be applied weeks of months later. Any progress that was saved to a loan file--including disclosure tracking information--can be reverted and erased if a previous autosave is recovered by a user.

A way to track for this information can be done through the use of the **System Audit Trail** under the settings menu.
- Search for individual Loan Files through Borrower's **Last Name** and Action **Modified**.
- If an autosave has been restored to the loan file at any point, the entry will show under the **Additional Info** column.



2) A Field Data Entry business rule prevented the loan file from saving.

In order for a disclosure tracking entry to remain within a loan file, the loan file must be **saved** after the disclosure package is sent.

Field Data Entry business rules apply to all **non-super administrator** personas.
If a Field Data Entry business rule is active in the Encompass environment--that requires **pre-required fields**--data cannot be inputted into a specified field ID until the pre-required fields have been fulfilled and cannot be saved.
If a **super administrator** persona puts data into the field ID that an active field data business rule references--without filling out any of the pre-required fields--the super administrator **can** save the change to the loan file. However, when all **non-super administrator** users attempt to save changes to that same loan, they will receive an error message requiring that pre-defined fields must be met first.

eDisclosure packages **can** still be sent out by all users, but if the user is not a super administrator, the disclosure tracking information will **not save** to the loan because the business rule prevents the loan file from being saved.

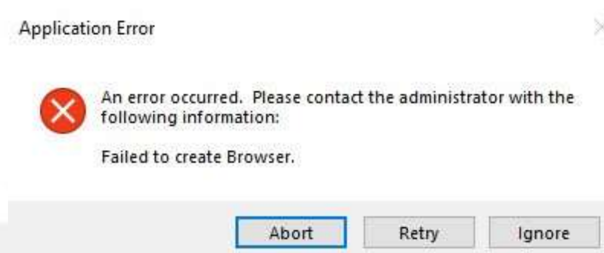
email – vedprakash75@gmail.com
Phone - +1-3362524985
LinkedIn - https://www.linkedin.com/in/vedprakash75/
Website – https://qualityexcellence.info

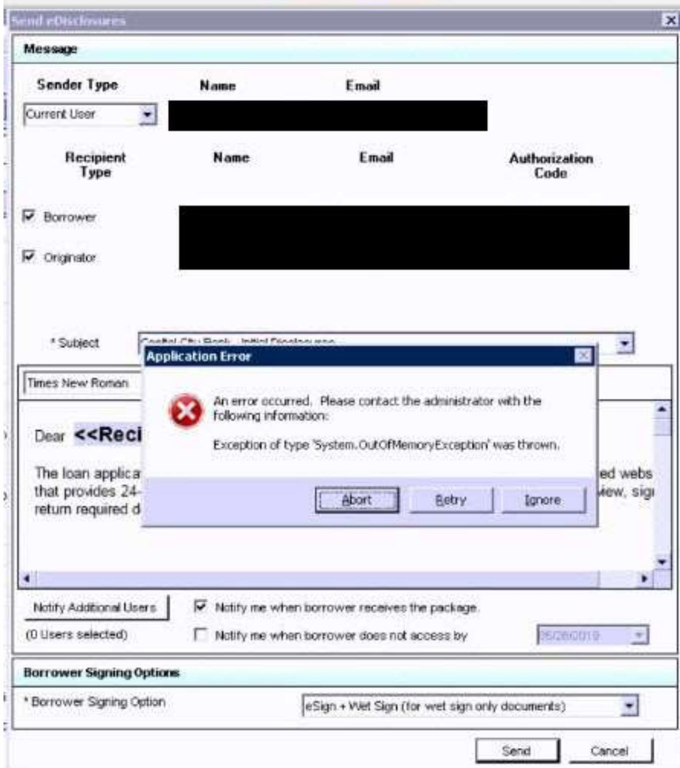
3) Encompass crashes/disconnects during the sending process

After a disclosure package is generated and sent, Encompass makes a connection with the server. If the Encompass application crashes or disconnects during this connection, the server will still send out the eDisclosure package, but the application will not create the correlating entry in Disclosure tracking. For the application, it's as if the Cancel button was selected at the end of the process.

4) System resource errors during send process

Issues which can occur while sending the disclosure package, such as the errors below when attempting to display DocuSign viewer, will allow the package to be sent, but no tracking record or eFolder documents will be created.





Information to consider and collect for Ellie Mae Customer Support:

1) Ensure Smart Client version is 19.2.0.5 or greater
2) Verify Disclosures were ordered after the upgrade to 19.2.0.5

email – vedprakash75@gmail.com

Phone - +1-3362524985

LinkedIn - https://www.linkedin.com/in/vedprakash75/

Website – https://qualityexcellence.info

3) Capture the Loan GUID
4) Screenshot of the error
5) Time frame of when the issue occurred 6) How often does it occur?