



Truework User Guide

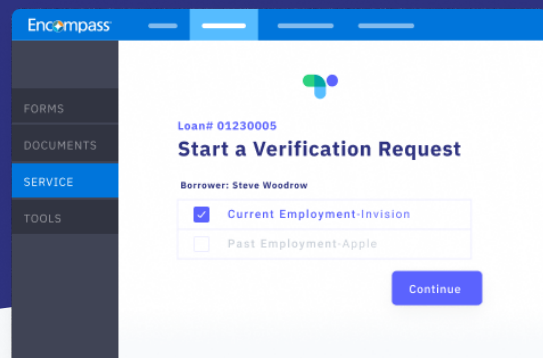
# How to use Truework through Encompass®

Complete a verification for any US employee directly from the Encompass platform

# Complete verifications on Encompass in 7 steps

Once Truework is set up by the Encompass Admin, this guide will cover how to submit an income or employment verification request using Truework within Encompass.

If your admin has not connected Truework to encompass, email [teams@truework.com](mailto:teams@truework.com)



## STEP 1

As an Encompass user, whether using Encompass LO Connect™ or Encompass Smart Client, go to the **Services** tab within Encompass.

## STEP 2

Within the Services tab, select **“Verifications”**. In the dropdown of providers, select **“Truework”**.

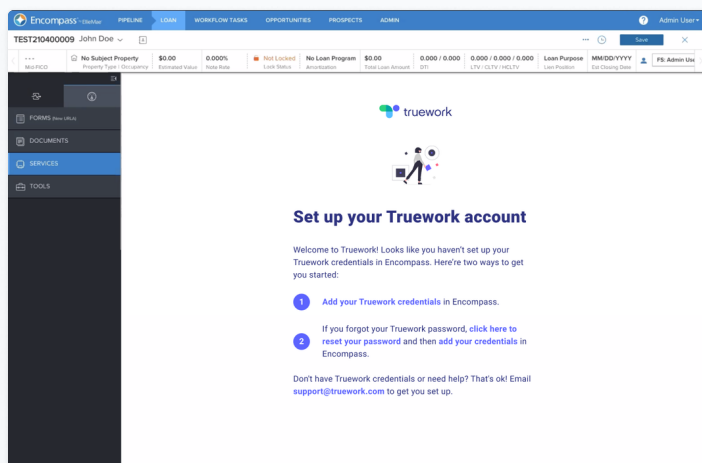
## STEP 3

Once you select Truework, you may be asked to **provide your Truework credentials** if the Admin hasn't already added credentials on your behalf.

- ✓ These credentials are the same credentials you use to login to Truework via our website.
- ✓ Once you provide credentials, you won't have to do so for future sessions on Encompass.

## STEP 4

After logging in, if no existing Verification Requests on the loan exist, you'll get taken to the **Start A Verification Request** page



### ⓘ Don't have credentials?

Ask your Truework Teams Admin to add you to your Team in order to gain log-in credentials for Truework. You can email [teams@truework.com](mailto:teams@truework.com) if you run into any problems.

### ⓘ Forgot your password?

Go to [app.truework.com](https://app.truework.com), click *Forgot Password*, then follow the instructions to reset your password.

Step 1 of 2

## Start a Verification Request

Select all employers you'd like to verify.

☐ Select All ☒ Select All Current ☐ Select All Past

Borrower: Jane Applesseed

<input checked="" type="checkbox"/> Current Employment - Joe's Market	2019-Current
<input checked="" type="checkbox"/> Past Employment - Walmart	2017-2019
<input type="checkbox"/> Past Employment - Sweet Pea's Grocery	2009-2017

Co-Borrower: John Applesseed

<input checked="" type="checkbox"/> Current Employment - ABC Marketing Solutions US Pvt Ltd	2019-Current
<input type="checkbox"/> Past Employment - Huge Advertisement	2017-2019
<input type="checkbox"/> Past Employment - Real Communications	

Co-Borrower: Adam Applesseed

<input checked="" type="checkbox"/> Current Employment - Bay Area News	2019-Current
<input type="checkbox"/> Past Employment - New York Times	2017-2019

Cancel

Continue

## STEP 5

Select all employments you want to verify across all borrowers on the loan.

Step 2 of 2

## Additional Information

Select the type of verification and upload authorization forms for all borrowers selected from the previous step.

Verification Type

- ☒ **Employment Only**  
A report verifying an employee's job title, employment status, and dates of employment
- ☐ **Income and Employment**  
A report verifying an employee's income, job title, employment status, and dates of employment

Authorization Form - All Borrowers

To prevent a delay in your request, please provide a form signed within the last 90 days.

Select your document(s) from Encompass Documents folder

Select Document(s)

Cancel

Submit Verification Request

## STEP 6

Select Verification of Income or Employment, and upload the authorization form. This ensures that Truework can complete these requests in a compliant manner.



## Your verification requests have been submitted successfully!

Our team is working on processing your request(s) for loan #1808EM000042.

**Estimated Turn Around Time**

80% of verifications take between 0 to 2 days to complete

**What's Next**

Once a request is complete, the completed report will automatically get sent to your Documents folder and you'll receive an email.

For any other updates to a request, you will get notified through email and can click on 'Check Status' to view updated status information and download reports.

Go to Truework Dashboard

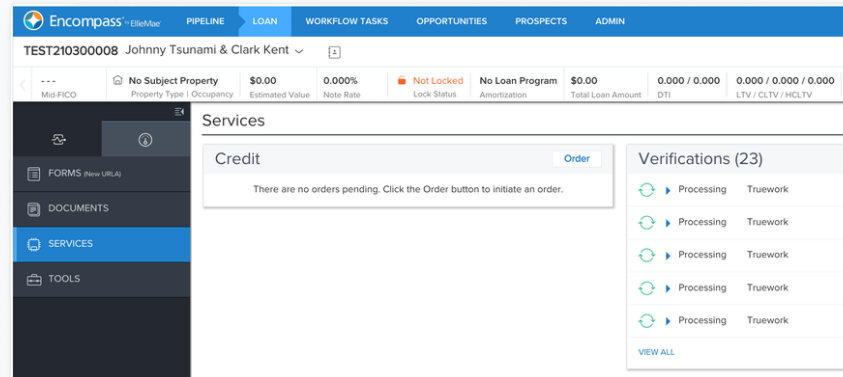
Check Status

## STEP 7

That's it! The request has been submitted and you can track the status within Encompass.

# How to check verification status

To check the status of a verification, simply click the pending verification.



## Verification Status

### Completed

Once the request is complete, you will receive an email with the report which will also populate in Encompass.

- ✓ Email
- ✓ Encompass eFolder

### Action Needed

If any more information is required to complete request (eg. the name of a branch if the employer works at a franchise), Truework will notify you by email and in the Check Status tab that there is **Action Needed**.

- ✓ Clicking on “**Respond**” will take you to the Truework dashboard, where you can add additional information.

### Reverification

Once a verification is complete, you can select the **Reverify** button from the “Check Status” page to complete a reverification within 90 days.

The screenshot shows the 'Check Status & Reverify' page. It has a heading 'Check Status & Reverify' and a subheading 'Check the status for your existing requests. Only completed requests from the last 90 days are eligible for a reverification.' Below this, it shows 'Request Date: Mar 30, 2021' and a link to 'View more details of your request on truework.com.' The page lists two borrowers: 'Jane Appleseed' and 'John Appleseed'. For Jane, there are two entries: 'Joe's Market' (Current Employment) with a status of 'Completed' and 'Available in eFolder', and 'Walmart' (Current Employment) with a status of 'Action Needed' and a 'Respond' button. For John, there are two entries: 'ABC Marketing Solutions' (Current Employment) with a status of 'Completed' and 'Available in eFolder', and 'Bay Area News' (Current Employment) with a status of 'Currently Processing'. A 'Reverify' button is highlighted next to the 'ABC Marketing Solutions' entry.

### Do you have more questions?

Email [teams@truework.com](mailto:teams@truework.com) or contact us through the chat function within your Truework dashboard