HIGH LEVEL DESIGN DOCUMENT

Purpose of the Course	This course is designed to provide the participant…. • An introduction to the specific practices, procedures, polcies, and best practices in regard to performing the key duties of a loan processor. • Demonstrate each key task within Encompass and related systems to establish standards and methodology for new loan processing employee • A deeper knowledge of where to find resources, guides, help, and information for self study and reference. • Practice in performing those tasks in a consequence free environment. • Confidence in their abilities to complete tasks having seen, heard, and perfomed them before. • The knowledge to increase the quality of files going to Underwriting.
Audience Description & Scale	The primary audience includes- New hired loan processors, the majority of which do not have experience within the industry or to the specific tasks of a loan processor. 0-1 year experience on the Encompass system. Secondary audiences included- Newly hired employees with loan processing experience, members of other teams trying to get a basic overview of the encompass system, and other team members surveying the course. 1+ years of experience on the Encompass system.
Course Objectives	After completing this module, participants should be able to…… • Login to Encompass and locate the primary screens for core tasks and activities they will perform. • Customize their various views screens and other conveniences to make their processes easier. • Review the rules and procedures for communications, alerts,

	notifications, and other key documentation/communication. • Locate the necessary forms, worksheets, and disclosures amongst other items within the system. • Reference any number of help resources for reminders, double-checking, or continual development.
Scope of the Project	Teaching the navigation, geography, helpful hints, best practices, and available resources of the Encompass system.
Business Impact	What impacts will the training solution have on the business? Increase the immediate productivity of new hire processors by creating base knowledge of the system to build off of. Easily scalable for additional employee onboarding and training in other positions. Decrease new hire turnover rates, which would result in lower turnover expense. In time and in combination with a few other help items, we will decrease the number of questions and issues that processors bring to the encompass support team. Reducing a huge overhead expense. Establish consistency in the how Processing uses the Loan Origination System.
Assessment Plan	Knowledge checks, content review activities, final assessment delivered through the LMS Knowledge checks and various activities will be built into each lesson to ensure participant understanding. Peer review and game based activities. Hands on activities within the training folder of Encompass. Online Course Assessments
Instructional Strategies	The training will be delivered via a blended use of modalities including VILT, video, elearning, peer studying, game-ification, and flipped-classroom.
Time	The complete course is estimated to be 2 hours, with 1-2 hours of reinforcement and assessment the user will complete on their own or

	with peers.
Module Structure and Scope	Module 1: Encompass Outline Introduction I. Greeting, Purpose, Plan a. Talk about what they will learn b. What they will be able to do c. Activities and evaluations to follow II. Login a. Instructor will demonstrate login, have new hire's login as well. b. Talk about single sign on, other login hints and tips. III. Landing/Home Page a. Summary page providing links with other fields b. Review of the features on page (alerts, tips, etc.) c. Review of the geography of the system 1. Menu Bar 2. Tab Bar 3. Key Terms and locations 4. Buttons, tabs, and hints IV. Pipeline Tab a. Talk about purpose and geography b. Loan folder and advanced search c. Filtering the list and columns d. Drilling down into items from pipeline e. Training Folder V. Loan tab a. Layout and purpose b. Messages and alerts c. Log history d. Form tab- Show All Selected e. Tool Tab f. Services VI. Finding Help and Resources a. Home screen resources and support b. Ctrl and click, Ctrl G, Ctrl C, and Crtl V c. Click F1 d. Mouse hovering and how to shut it off. e. Audit Trail

	VII. Efolder a. Files, Documents, and Conditions uploaded to underwriting eventually a. Milestone worksheet & Milestone Comments/Tips b. Order Services c. Tracking and Clearing conditions d. No autosave, keep saving VIII. Evaluation a. LMS quiz locations, resources, and features of Encompass b. “Snap Shot” scavenger hunt in the system (Perhaps a race or teams) c. Questions from New hires Module 2: The 4 C’s of Using the Encompass System I. Customizing view screens a. Home Page b. Pipeline Page c. Loan Folder d. Other II. Communication- Clear but excessive documentation, more than one place for the same message is fine. a. Alerts b. Messages/Notes c. Descriptions (Efolder Pipeline Processor only) d. Notifying users e. Conversation Log/Comments f. Requesting information/documentation III. Contacts a. Creating a contact within Nation’s Lending b. Creating outside contacts c. Revising and changing contacts IV. Compliance and Other Topics b. Compliance review c. Fee Variance worksheet
Post Training Support	After this course, participants will move into a structured role specific training environment where work loads will increase as they build

	proficiency. They will have an on the job mentor as well as collaborate with other team members as a part of their ongoing development.
Development Tools / Delivery Media	The following tools will be needed to develop the training materials: • Department procedures and process maps • MS Word and PowerPt; Camtasia, Snag-It, Excel • Articulate and LMS system • Any existing training content from BAI or developed by the department • Encompass access and use of training folders • Xinnix?
Development Team Roles and Responsibilities	• ID- Bradley Adamczyk • SMEs- Dawn Thompson, Kathy Argel? • Department leadership- Drew, Mollie Beam • L&D leader- Mark Bishop
Estimated Development Time	Module one draft due for review: 8/25 Module two draft due for review: 9/20 Final course ready for demonstration: 10/1
Support Requirements	1. The candor and communication to truly understand the role and the results we are trying to accomplish together. 2. A structured timeframe for the training to take place. 3. The program will needed to be tested by a handful of leadership and existing employees. 4. Brad on PTO 8/26 – 9/07

	5. SME availability 6. Access to Encompass functions. 7. Reviews and approvals 8. Other projects that may need more immediate attention