LODESTAR

Encompass Implementation Plan

Welcome! We're excited you've partnered with LodeStar. In this document, you will find a detailed implementation plan outlining each phase of your onboarding, as well as helpful resources for your team.

LodeStar is doing the heavy lifting, don't worry! But after partnering with hundreds of lenders, we have some best practices to ensure things are moving forward efficiently and smoothly.

But first, let's meet the implementation team!

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Director, Customer Success

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Senior Implementation & Onboarding Manager

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Implementation & Onboarding Manager

PHASE 1: QUESTIONNAIRE

Estimated completion time: 1 week

Phase objective: During this phase, you will provide LodeStar the information that is required for the initial setup. *Without this information, we can't begin your setup!*

First off, please assign one team member to be the point of contact for all things LodeStar at your company. This person will oversee the LodeStar implementation. We see that this individual is usually a Project Manager or team lead from your Mortgage Operations Team.

Team Members Required: LodeStar Project Leader (see above)
LOS Administrator(s)

Tasks to Complete:

- Complete the LodeStar onboarding questionnaire provided by your sales representative. The questionnaire includes:
  - Encompass configuration info
  - Your list of preferred service providers (title & escrow agents, attorneys, etc.)
  - Loan types and specific fees you'd like us to support
  - Specific LodeStar setup info

- The LodeStar project leader should review this implementation plan and reach out with any questions.

- The project leader should assign 2 to 5 team members to be testers (see phase 3 below for more information).

Once you have completed your onboarding questionnaire, we will schedule your official kick off call and move into the next phase!

Who is your point of contact at LodeStar during this phase?
your LodeStar Sales Representative

PHASE 2: KICKOFF CALL & SETUP

Estimated completion time: 2 to 4 weeks

Phase objective: During this phase, you will meet your LodeStar Implementation & Onboarding Manager and scheduled your LodeStar Kickoff call.

Team Members Required: LodeStar Project Leader
LOS Administrator(s)
Assigned testers

Tasks to Complete:

- We will be scheduling your kickoff call with your LodeStar Onboarding & Implementation Manager and all required team members (see above). ALL required team members must attend this call.
- Please set up your EPC credentials that are provided to you in the kickoff call introduction email. Here is our guide on how to do this.
- Please read over LodeStar's 2015 itemization defaults for sections 1100 and 1200, as well as the SSPL defaults.
- Browse through LodeStar's Help Center. Your Onboarding & Implementation Manager will be referring to our support articles frequently.
- Any team members who are not familiar with our integration should watch our pre-recorded Encompass demonstration before the kickoff call.

After your kickoff call, LodeStar will be configuring your integration internally. Once setup is comple, we will let you know and you can beging testing.

Who is your point of contact at LodeStar during this phase?
your Onboarding & Implementation Manager

PHASE 3: TESTING

Estimated completion time: 4 to 8 weeks

Phase objective: During this phase, your team will test LodeStar within your LOS (and POS, if needed) to resolve configuration requests and remedy any discovered issues or updates that need to be fixed prior to going live.

Team Members Required: LodeStar Project Leader
Assigned testers (see below)

What is an assigned tester?

- An assigned tester is someone who will be testing the LodeStar integration during the testing phase.
- These testers should be able to advise on any issues or configurations requests that need to be updated within your LOS and POS.
- We recommend that various teams are represented during testing (Compliance, Sales, Operations, etc).

Tasks to Complete:

- Each tester and the project leader should thoroughly review the LodeStar testing guide and become acquainted with our Support Center. The testing guide describes in detail how to efficiently test LodeStar and includes other important information to know during testing.

- Testers should add any compliance errors, configuration updates. issues or requests on their LodeStar testing log (see more details regarding the testing log on the testing guide).

- Once testing has started, a required check in call will be scheduled 20 days after the start of testing. The purpose of this call is to check in on progress and address any concerns or questions.

The testing phase will continue until both parties have agreed testing is completed and are ready to move into production.

Who is your point of contact at LodeStar during this phase?
your Onboarding & Implementation Manager

PHASE 4: GO LIVE!

Phase objective: After your testing phase is complete, LodeStar will be live! Before going live, we are able to provudew you with two optional training calls for your end users.

Team Members Required: LodeStar Project Leader
All LodeStar end users (optional)

Tasks to Complete:

- The LodeStar project leader can coordinate with their LodeStar onboarding & implementation manager to schedule the training calls for your end users.
- Both training calls will entail:
    - Two 30 minute calls scheduled for separate times and days (that way everyone can make at least one).
    - Both calls will introduce the LodeStar integration, walk through two example loan files showing the users how to access LodeStars and offer a Q&A at the end of the call.
    - Both calls will be recorded and sent to the LodeStar project leader.
- Once training calls are completed, you will be live. Any questions can be sent to our Support Team at support@lssoftwaresolutions.com.
- You will continue to have full access to our Support Center where most of your questions can be answered.

Any questions, comments or concerns can be sent to our support team at support@lssoftwaresolutions.com.

Who is your point of contact at LodeStar during this phase?
your Onboarding & Implementation Manager

AFTER GO LIVE

Once you are live our support doesn't stop there! Nothing is set in stone during onboarding and we expect our customers to have changes or updates throughout our partnership. We have outlined below a few ways to get help after you are up and running with LodeStar.

How do I get help?

- Our support center has lots of information, not only about how to use LodeStar within your POS and LOS, but information about state-specific fees, section E fees, LodeStar defaults and the data we provide.
- To add a provider to your LodeStar calculator, please use our title agent request form. Once we receive the provider's fees, it will take 1 to 3 days to set them up.
- If you'd like to inquire about adding additional LodeStar services, such as a POS, upgrading to a new tier or adding an additional feature, please reach out to support@lssoftwaresolutions.com.
- If you have a question regarding your invoice or general billing questions, please reach out to billing@lssoftwaresolutions.com.

We are so excited you are apart of the LodeStar team now! Thank you for partnering with us.