

GET CONNECTED

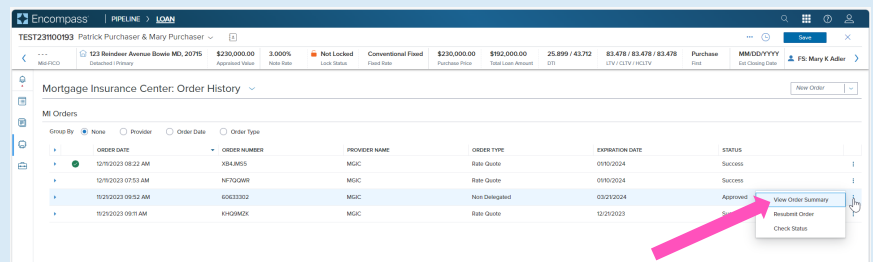


Quick Guides – Send Post Close Documents through Encompass Partner Connect™

Last Revised Date: 01/22/2024

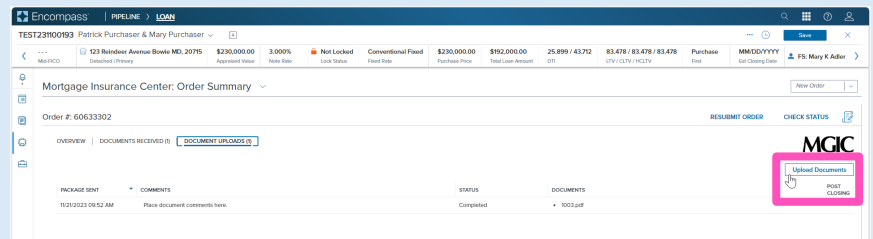
1. Select Order

From within a loan, navigate to the **Mortgage Insurance Center**. Open the **Order Summary** screen of the order you would like to submit documents for.



2. Attach Documents

On the **DOCUMENT UPLOADS** tab, click the **Upload Documents** button.



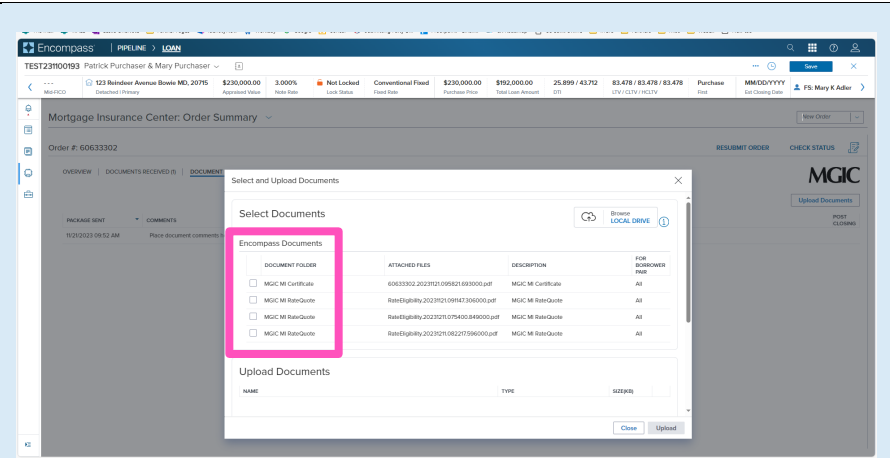
Contacts: MGIC Integration Services
integration_services@mgic.com 1-888-644-2334

Your MGIC Representative
mgic.com/contact

#24-18105
01/22/2024

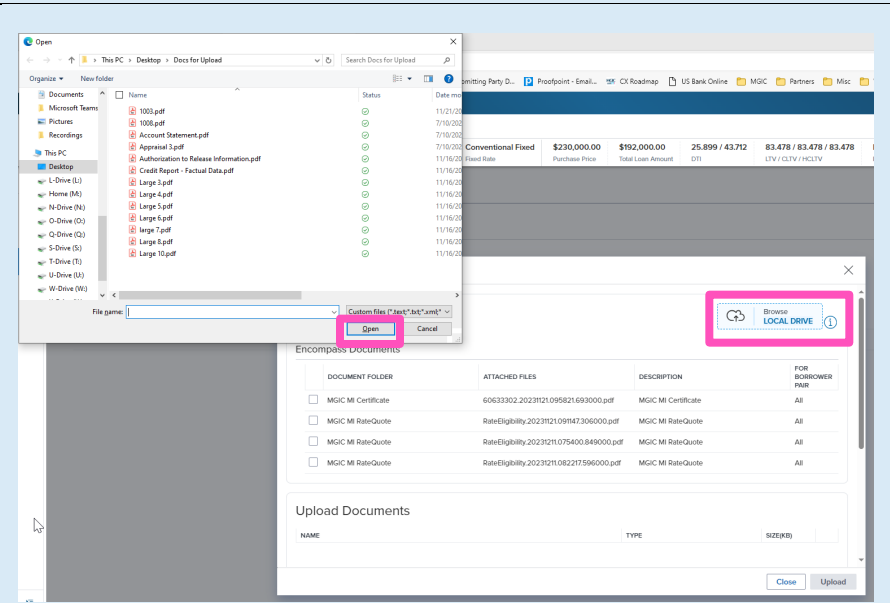
The **Select and Upload Documents** window will open.

If the document(s) you would like to submit are in the eFolder, select them from the **Encompass Documents** section.



You may also attach documents saved locally by clicking the **Browse LOCAL DRIVE** link.

Use your file explorer to navigate to the appropriate drive, select the document(s) you wish to attach, and click the **Open** button.



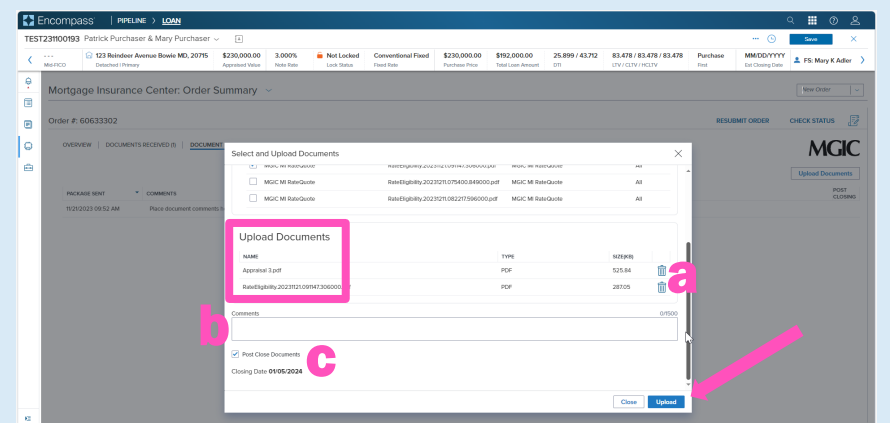
3. Submit Documents

All selected documents will display in the **Upload Documents** section.

- Click the **trash can** icon for any documents you do not want to submit.
- Add any additional information you'd like noted within the **Comments** section.
- Ensure the **Post Close Documents** checkbox is checked.

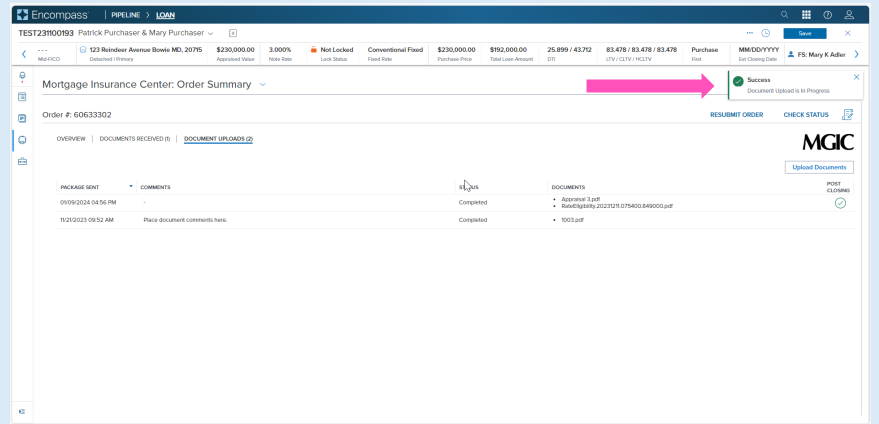
Click the **Upload** button to submit the document(s).

Note – The **Closing Date** is displayed, and should be on/before the date of submission. The **Post Close Documents** checkbox should default to checked as long as the date is not in the future.



A spinner will appear letting you know the request has initialized.

Upon completion you will be redirected to the **Order Summary** Screen and a status message will then appear letting you know the upload is in progress.



The **DOCUMENT UPLOADS** tab displays details of documents uploaded:

- PACKAGE SENT (date/time)
- COMMENTS
- STATUS
- DOCUMENTS (list)
- POST CLOSING (indicator)

Note – You may have to refresh the page to see the completed document upload.

