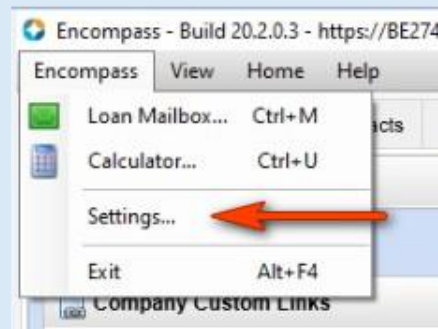


## Use Stacking Order Templates in Encompass<sup>®</sup>

### 1. Access Settings

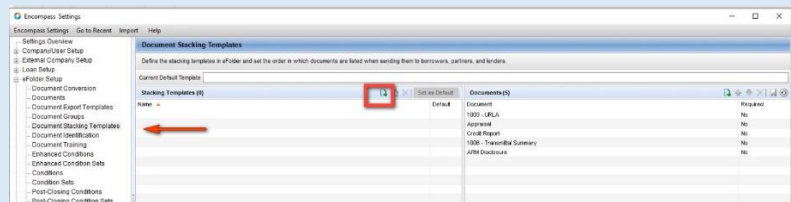
Go to **Encompass>Settings**.



### 2. Create New Stacking Template

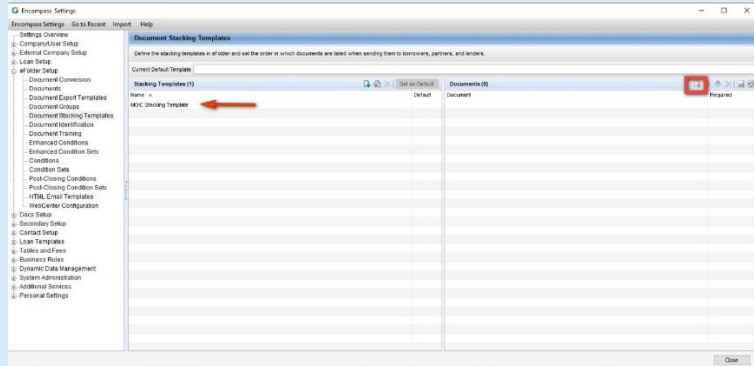
Under **Encompass Settings**, go to **eFolder Setup>Document Stacking Templates**.

Click the **New Stacking Template** icon to create and name a new stacking order.



### 3. Add Documents

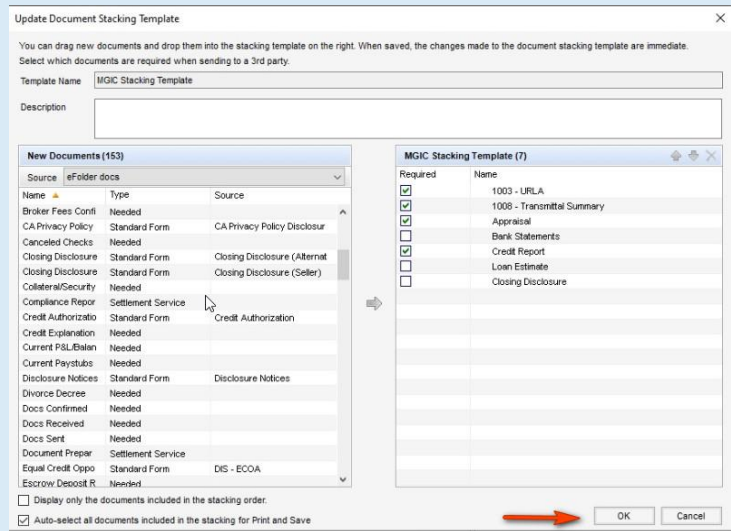
Highlight the new stacking order template and click the **Add Document(s) to Stacking Order** icon



### 4. Add Documents to Stacking Template

Drag and drop documents from the document list on the left onto the new stacking template on the right. Indicate which documents are required by clicking the box in the **Required** column.

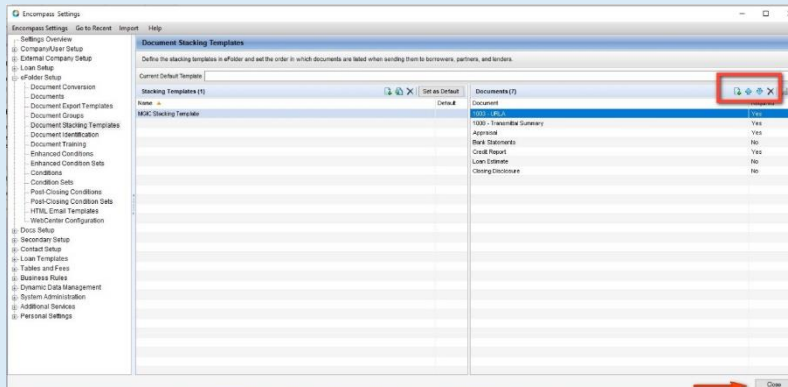
Click **OK**.



## 5. Modify Stacking Order

Select documents and move them up or down using the arrows.

Click **Close**.



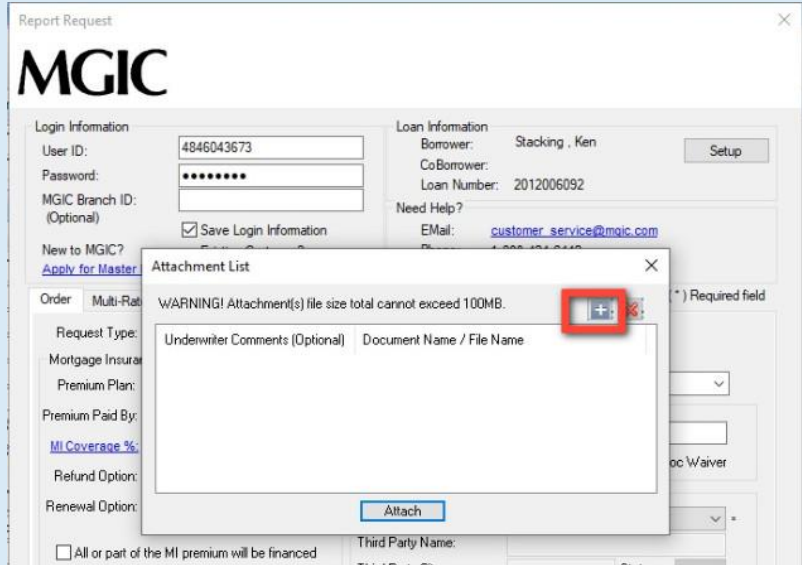
## 6. Select Order Non-Delegated MI

Select **Order Non-Delegated MI** from the **Request Type** drop-down to activate the **Upload UW Documents** section and enter the appropriate MI information.

Click **Upload UW Documents** to open the **Attachment List**.

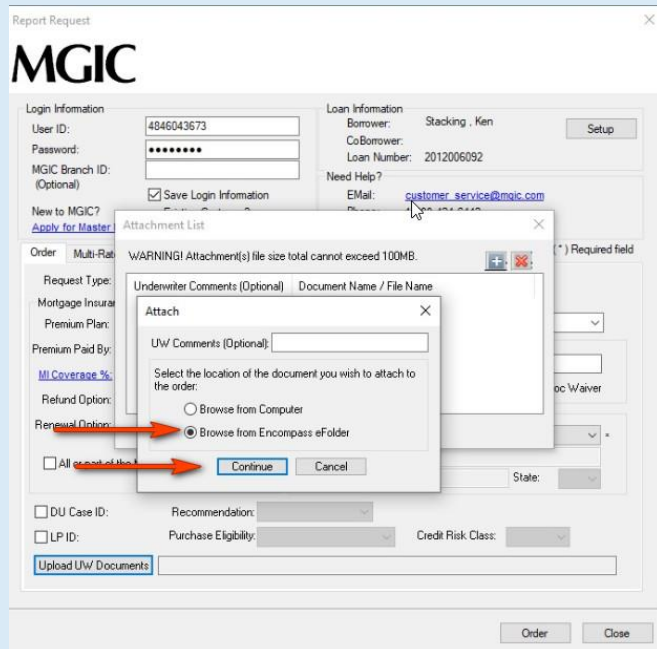
## 7. Add Attachment

Click the **+** (plus) icon on the **Attachment List** screen to add a document.



## 8. Browse Documents

To add documents from the eFolder, select **Browse from Encompass eFolder** and click **Continue**.



## 9. Select Stacking Order

Select the **Stacking Order** you created and click **Continue**.

Note: Encompass won't allow you to continue if any required documents are missing.

Alt	Name	Requested From	For Borrower Pair	Status	Date	Required
<input checked="" type="checkbox"/>	1003 - URLA		Ken Stacking	Received	12/01/20	Yes
<input checked="" type="checkbox"/>	1008 - Transmittal Summary		Ken Stacking	Received	12/01/20	Yes
	Appraisal					No
	Bank Statements					No
<input checked="" type="checkbox"/>	Credit Report		Ken Stacking	Received	12/01/20	Yes
	Loan Estimate					No
	Closing Disclosure					No

## 10. Attach Documents

Click **Attach** to attach the documents to the loan.

Attachment List

WARNING! Attachment(s) file size total cannot exceed 100MB.

Order	Multi-Rate	Document Name / File Name
		1003 - URLA
		1008 - Transmittal Summary
		Credit Report

Attach

## 11. Order Non-Delegated

MGIC's interface displays the attached document(s).

Click **Order** to submit the non-delegated MI order to MGIC.

The screenshot shows the MGIC 'Report Request' interface. The 'Order' tab is selected. The 'Request Type' is set to 'Order Non-Delegated MI'. The 'Mortgage Insurance Information' section includes fields for Premium Plan (Monthly Premium (ZDMP)), Premium Paid By (Borrower-Paid), MI Coverage % (25), Refund Option (Non-Refundable), and Renewal Option (Constant). The 'Additional Loan Information' section includes MGIC Rate Quote ID, MGIC Special Program ID (Employee Relocation Loan and AUS Doc Waiver), and Originator Information (Lender Type: Retail, Third Party Name, Third Party City, State). The 'Upload U/W Documents' field is highlighted with a red box and contains the text '1003 - URLA, 1008 - Transmittal Summary, Credit Report'. An orange arrow points to the 'Order' button at the bottom right.