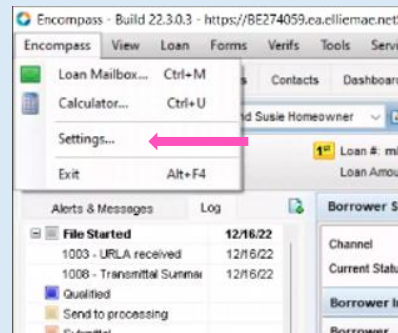


## Use Stacking Order Templates in Encompass<sup>®</sup>

### 1. Access Settings

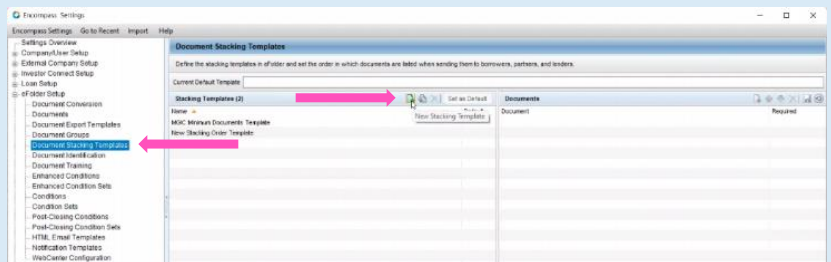
Go to **Encompass>Settings**.



### 2. Create New Stacking Template

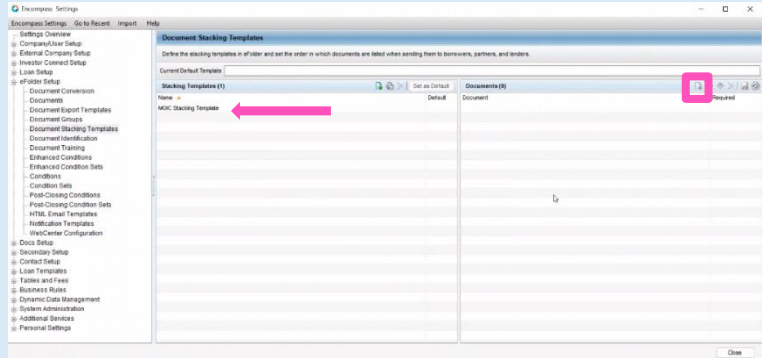
Under **Encompass Settings**, go to **eFolder Setup>Document Stacking Templates**.

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



### 3. Add Documents

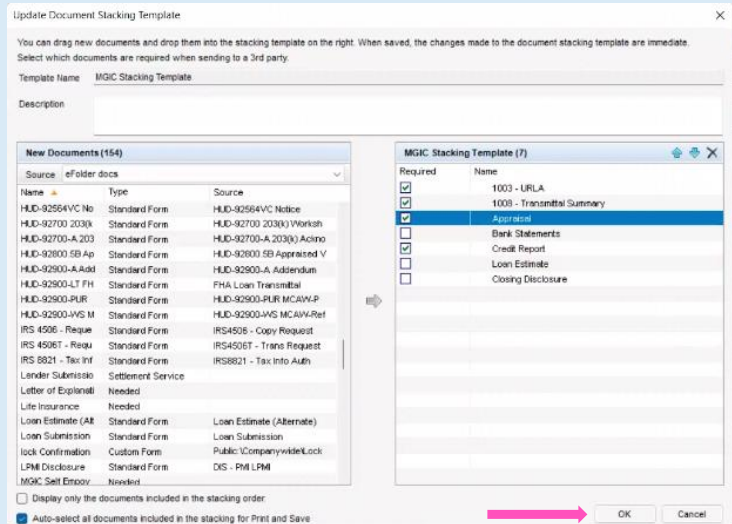
Highlight the new stacking order template and click the **Add Document(s) to Stacking Order** icon.



### 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.

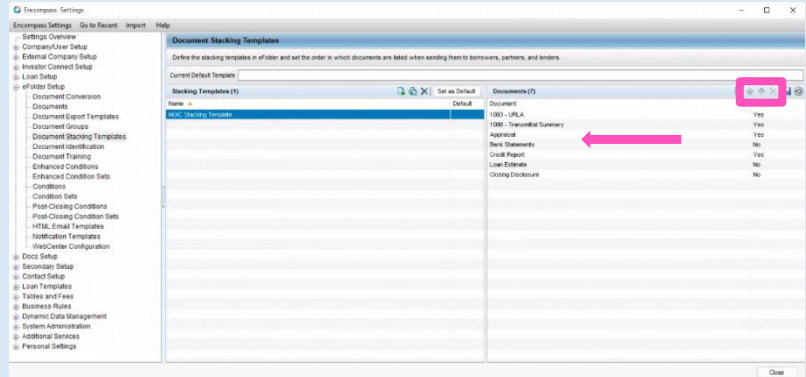
Click **OK**.



## 5. Modify Stacking Order

Select documents and move them up or down using the **arrows** or remove them using the **X** icon.

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**.

**MGIC**

Report Request

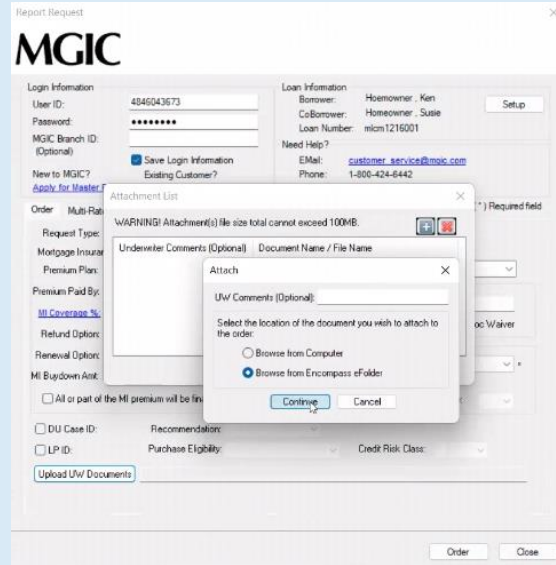
Loan Information: Borrower: Homeowner, Ken; Co-Borrower: Homeowner, Susie; Loan Number: micm1216001

Request Type: Order Non-Delegated MI

Upload UW Documents

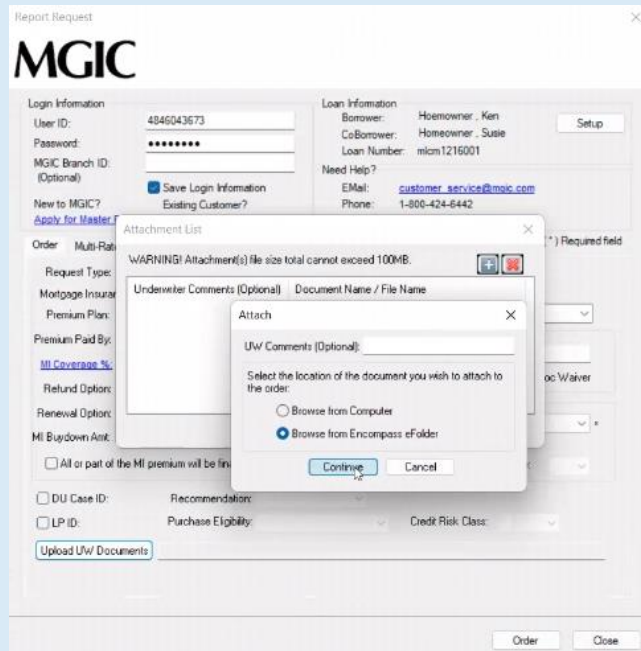
## 7. Add Attachment

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.

All	Name	Requested From	For Borrower Pair	Status	Date	Required
<input checked="" type="checkbox"/>	1003 - URLA		Ken Homeowner and Su...	Received	12/16/22	Yes
<input checked="" type="checkbox"/>	1008 - Transmittal Summary		Ken Homeowner and Su...	Received	12/16/22	Yes
<input checked="" type="checkbox"/>	Appraisal		Ken Homeowner and Su...	Received	12/16/22	Yes
	Bank Statements					No
<input checked="" type="checkbox"/>	Credit Report		Ken Homeowner and Su...	Received	12/16/22	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.

Underwriter Comments (Optional)	Document Name / File Name
	1003 - URLA
	1008 - Transmittal Summary
	Appraisal
	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. At the top, the MGIC logo is displayed. The form is divided into several sections:

- Login Information:** Fields for User ID (4846043673), Password (masked with dots), and MGIC Branch ID (Optional). There are checkboxes for 'Save Login Information' (checked) and 'New to MGIC? Existing Customer?'. Links for 'Apply for Master Policy' and 'Need User ID/Password' are present.
- Loan Information:** Fields for Borrower (Homeowner, Ken), CoBorrower (Homeowner, Susie), and Loan Number (mlcm1216001). A 'Setup' button is located to the right.
- Need Help?:** Fields for Email (customer\_service@mgic.com), Phone (1-800-424-6442), and Online (Full User Guide).
- Navigation:** A row of buttons: Order, Multi-Rate Quote, Check Status/View Result, and Activate MI. A note '(\*) Required field' is on the right.
- Request Type:** A dropdown menu set to 'Order Non-Delegated MI'.
- Mortgage Insurance Information:** Fields for Premium Plan (Monthly Premium [ZOMP]), Premium Paid By (Borrower-Paid), MI Coverage % (12), Refund Option (Non-Refundable), Renewal Option (Constant), and MI Buydown Amt (0.00). There is a checkbox for 'All or part of the MI premium will be financed'.
- Additional Loan Information:** Fields for MGIC Rate Quote ID, MGIC Special Program ID (If applicable), and checkboxes for 'Employee Relocation Loan' and 'AUS Doc Waiver'.
- Originator Information:** Fields for Lender Type (Retail) and Third Party Name. There is also a State dropdown.
- Other Fields:** DU Case ID, LP ID, Recommendation, Purchase Eligibility, and Credit Risk Class.
- Documents:** An 'Upload Lw/ Documents' button and a list of files: '1003 - URLA, 1008 - Transmittal Summary, Appraisal, Credit Report'.
- Buttons:** 'Order' and 'Close' buttons are at the bottom right.