

# GET CONNECTED



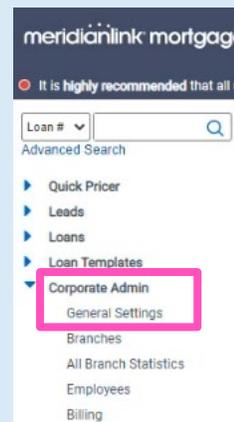
## Set Up MGIC in MeridianLink Mortgage – for Administrators

Last Revised Date: 03/28/2023

**Please note** – Your company’s MeridianLink Mortgage System Administrator must call MeridianLink Mortgage first to activate MGIC for employees to be able to submit rate quote and MI requests to MGIC.

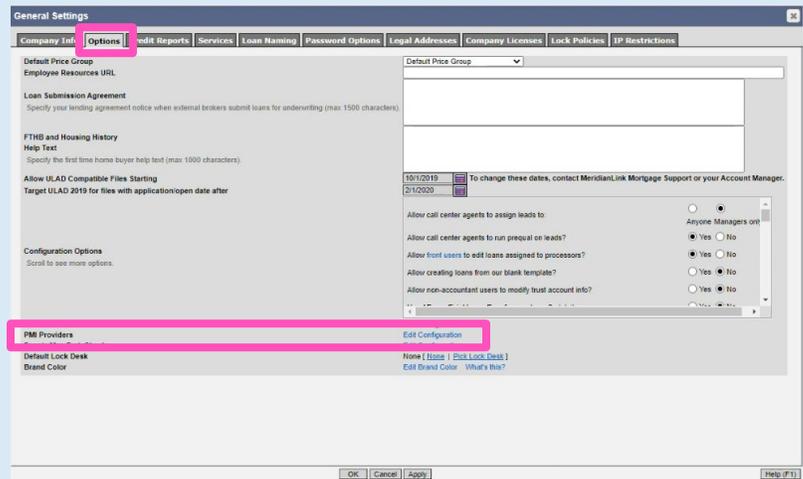
### 1. Provide Access to MGIC

From within MeridianLink Mortgage, in the left-hand menu, go to **Corporate Admin > General Settings** to reach the corporate-level settings.



## 2. Edit Mortgage Insurance Providers

Select the **Options** tab and click **Edit Configuration** for **PMI Providers**.



## 3. Enter MGIC Information

Enter the **Username**, **Password**, and your **MGIC Corporate Master Policy #**. Indicate whether the Underwriting Authority is **Delegated** by selecting **Yes** or **Non-Delegated** by selecting **No**.

Click **Save**.



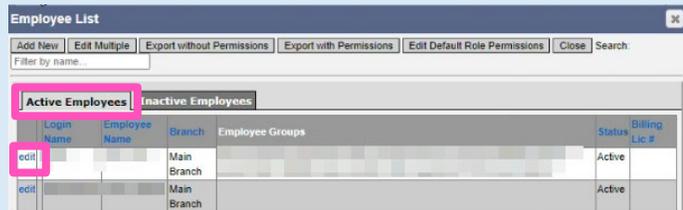
#### 4. Access Employee-Level Settings

From within MeridianLink Mortgage, on the left-hand menu, go to **Corporate Admin** > **Employees** to reach the Employee List.



#### 5. Identify Employee

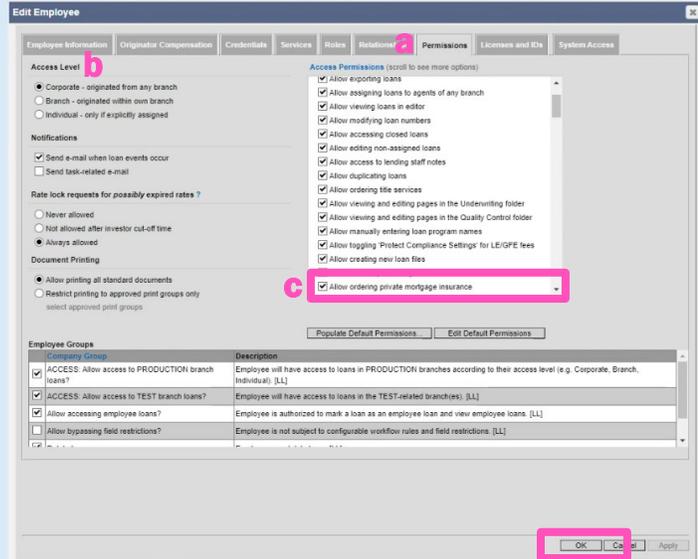
Under the **Active Employees** tab, click **edit** to the left of the Login Name.



## 6. Select Employee Permissions

- Select **Permissions** tab
- In the **Access Level** section, select the appropriate access.
- Ensure that the **Allow ordering private mortgage insurance** option is checked, along with any other appropriate Access Permissions.

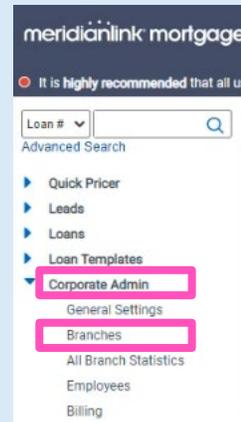
Click **OK**.



## 7. Setting Branch-Level Credentials

**Note** – Please consult with your MeridianLink Mortgage Representative prior to changing branch settings.

From within MeridianLink Mortgage, in the left-hand menu, go to **Corporate Admin** > **Branches** to reach the branch-level settings.



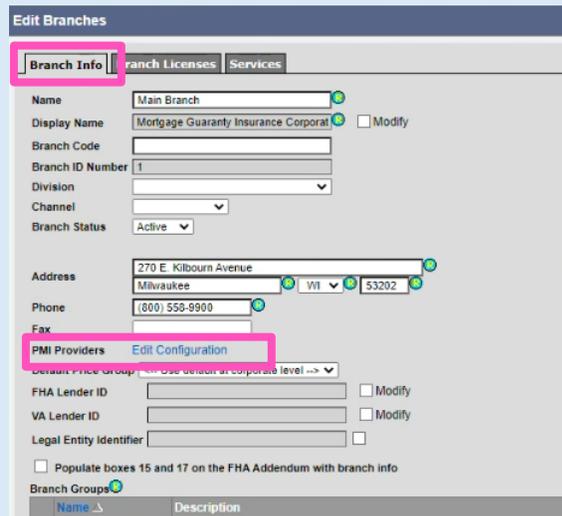
## 8. Select Branch

On the **Edit Branches** screen, click **edit** to the left of the branch name.



## 9. Access Provider Settings

Under the **Branch Info** tab, next to **PMI Providers**, click **Edit Configuration**.



## 10. Edit Branch Settings

Leave the **Use Corporate Settings** box checked if you want the corporate settings to carry over.

If you want to enter branch-specific settings, uncheck **Use Corporate Settings** and enter the **Username**, **Password** and **MGIC Branch Master Policy #**, and indicate whether the Underwriting Authority is **Delegated** by selecting **Yes** or **Non-Delegated** by selecting **No**.

Click **Save**.

