# 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.	mericiciniink: mortgage         It is highly recommended that all us         Loan # )         Advanced Search         Quick Pricer         Leads         Loans         Loan Templates         Corporate Admin General Settings         Branches         All Branch Statistics         Employees         Billing

Your MGIC Representative mgic.com/contact

MGIC

# 2. Edit Mortgage Insurance Providers

Select the <b>Options</b> tab and click <b>Edit</b> <b>Configuration</b> for <b>PMI Providers</b> .	Central Settings         Company Inti         Options         Indi Reports         Services         Leas Naming         Password Options         Legal Addresses         Company License         Lock Policies         TP Restrictions           Default Price Group         Englayer Resources USL         Englayer Resources USL		
	FTHB and Housing History Help Text Specify the fard time home buyer help bod (mar 1000 characters). Allow ULAD Compatible Film Starting Target ULAD 2019 for lines with application/open date after Configuration Options Servel to see more options.	IB102019 To change these dates, contact Meridiant, ink Mortgage Support or your Account Manager.  Allow call center agents to use use use to the state territory of the state	
	PM Providers Default Lock test Brend Color DK. Cancer	Edi Conformion New (Intel (Portoc Cash) Ent Evant Guinr Viture Nor? Ent Evant Guinr Viture Nor? [Repty]	
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.	PMI Provider Account Details MGIC Account Details Usernam Pessuor Corporate Master Policy Have Delegated Underwriting Authors	≥ 2 2 2 7 7 7 7 7 7 7 7 7 7 7 7 7	

4. Access Employee-Level Settings	
From within MeridianLink Mortgage, on the left-hand menu, go to <b>Corporate Admin</b> > <b>Employees</b> to reach the Employee List.	mericiciniink: mortgage     It is highly recommended that all us     Loan #      Q     Advanced Search     Quick Pricer     Leede     Loans     Loan Templatee     Corporate Admin     General Settings     Branches     All Branch Statistics     Employees     Billing
5. Identify Employee	
Under the <b>Active Employees</b> tab, click <b>edit</b> to the left of the Login Name.	Employee List       Image: Constraint of the premissions in the premission in the

#### 6. Select Employee Permissions

- a. Select Permissions tab
- b. In the Access Level section, select the appropriate access.
- c. 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 lefthand menu, go to **Corporate Admin** > **Branches** to reach the branch-level settings.



Contacts: MGIC Integration Services Integration services@mgic.com 1-888-644-2334 Your MGIC Representative mgic.com/contact

## 8. Select Branch

On the <b>Edit Branches</b> screen, click <b>edit</b> to the left of the branch name.	Edit Branches           Addrew tranch         Expert to CSV         Class           Active         Inanch Status         Branch Groups         Address         Phone         Fax           District Mane         Branch Code         Branch Groups         Address         Phone         Fax           District Mane         Branch Code         Branch Groups         Address         Phone         Fax           District Mane         Minus/Rev. VII 52:02         (dot) 558-9000         add new employee
9. Access Provider Settings	
Under the <b>Branch Info</b> tab, next to <b>PMI</b> <b>Providers</b> , click <b>Edit Configuration</b> .	Edit Branches Branch Info

Display Name M Branch Code Dranch ID Number 1 Division

Channel

Address

Phone

Fax PMI Providers

Branch Status

FHA Lender ID

VA Lender ID

Branch Groups

Mortgage Guaranty Insurance Corporat

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Populate boxes 15 and 17 on the FHA Addendum with branch info

Active 🗸

Milwaukee

270 E. Kilbourn Avenue

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Modify

Modify

#### 10. Edit Branch Settings

Leave the <b>Use Corporate Settings</b> box checked if you want the corporate settings to carry over.	MGIC Account Details Use Corporate Settings Prives Usernane Pessent Banch Matter Peloy # Hare Delogated Underwiting Addinety? Vei ® No
If you want to enter branch-specific settings, uncheck <b>Use Corporate Settings</b> and enter the <b>Username</b> , <b>Password</b> and MGIC <b>Branch Master</b> <b>Policy #</b> , and indicate whether the Underwriting Authority is <b>Delegated</b> by selecting <b>Yes</b> or <b>Non-Delegated</b> by selecting <b>No.</b>	Save Cancel
Click Save.	

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