# GET CONNECTED

## Quick Guides – Get a Rate Quote through Encompass Partner Connect<sup>™</sup>

Last Revised Date: 03/14/2024

### 1. Select Rate Quote

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Your MGIC Representative #24-18099 mgic.com/contact

01/22/2024

MGIC

Click the **Close** button to return to the order screen.

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MI Coverage % Details

### 2. Import MI Rates

Once the order response appears, click Import MI Rates to import the MI pricing into the loan. This is one option for importing a rate. A second option is described below.

Use the Close without Importing if you do not want to import the MI pricing.

Note – Importing MI pricing is necessary for populating disclosures as well saving the quote for it to be available to select for subsequent MI orders.

A spinner will appear letting you know the request is in process.

You will then receive a message indicating that the rates imported successfully.

Close the message when you are finished.



Success MI Rates Imported  $\times$ 

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### 3. View Rate Quote

You will be directed back to the **Order Summary** screen.

You will notice the following navigation tabs: OVERVIEW, DOCUMENTS RECEIVED, DOCUMENTS UPLOADED. You will also notice the **toggle arrow** next to **Order Summary** which will navigate you back to the **Order History** screen.

The **OVERVIEW** tab provides status and rates details, the quote expiration date, and messaging returned by MGIC with a reference number and new Quote ID.

Encompass ES: Mary K J .0 Mortgage Insurance Center: Order Summ E Ð ER 🕎 0 OVERVIEW MGIC . Status: Success Imported Rates Type Rate Quote Provider MGIC Order Date 12/19/2023 Paid By Borrower Premium Payment Periodic Monthly \$22.2 Product De Borrower P 12/19/2023 @ 02:23

The **DOCUMENTS RECEIVED** tab allows you to view the Rate Quote PDF.

The Rate Quote PDF will have already autosaved to the document folder. This is just a method to view it.

The **DOCUMENTS UPLOADED** tab is not relevant for MI Rate Quotes.

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#### 4. Subsequent Import of MI Rates

If you do not import MI rates upon receiving rate quote results (as shown above), or if you want to change the rates imported, you can import rates from a previously pulled quote via the **MGIC: Edit Order** page. To navigate to that page via the **All Services** screen, click the pop-out arrow on the far right of the rate quote entry.

To navigate to the **MGIC: Edit Order** page via the **MI Center**, go to the **Mortgage Insurance Center: Order History** screen. Click the elipsis to the right of the screen for the order you would like to import and select the **Open Quote Order** option.

At the bottom of **MGIC: Edit Order** page you will see an **Import MI Rates** link.

A status window will appear once the request is completed.

Click the **Save** button to ensure your updates are retained.

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