

GET CONNECTED



Quick Guides – Order Contract UW through Encompass Partner Connect™

Last Revised Date: 09/06/2024

1. Select Contract Underwriting

From the **MGIC: New Order** screen, select the appropriate **Contract Underwriting** option (with MI or without MI) from the Request Type drop-down.

2. Select Quote ID

The quote ID of your most recently imported quote should be populated in the **Rate Quote ID** field.

Click the **magnifying glass icon** to select a different quote ID.

Note – See the appropriate section of this guide for instructions to submit a Rate Quote, Multi Quote, or Compare Rate Quotes request.

The **Search Rate Quote ID** window will open. A list of prior quotes will appear.

Use the toggle button next to a quote to view additional details, or use the toggle all button at the top to open details on all quotes.

Click the radio button next to the preferred quote and click the **Select** button (this button will be disabled until a quote is selected).

You may also manually enter a quote ID on the **MGIC: New Order** screen if the preferred quote does not appear.

3. Attach Documents

You will be prompted to include documents with your order. Click the **Attach Documents** link to select the appropriate documents for your order.

The **Select Documents and Files** window will open.

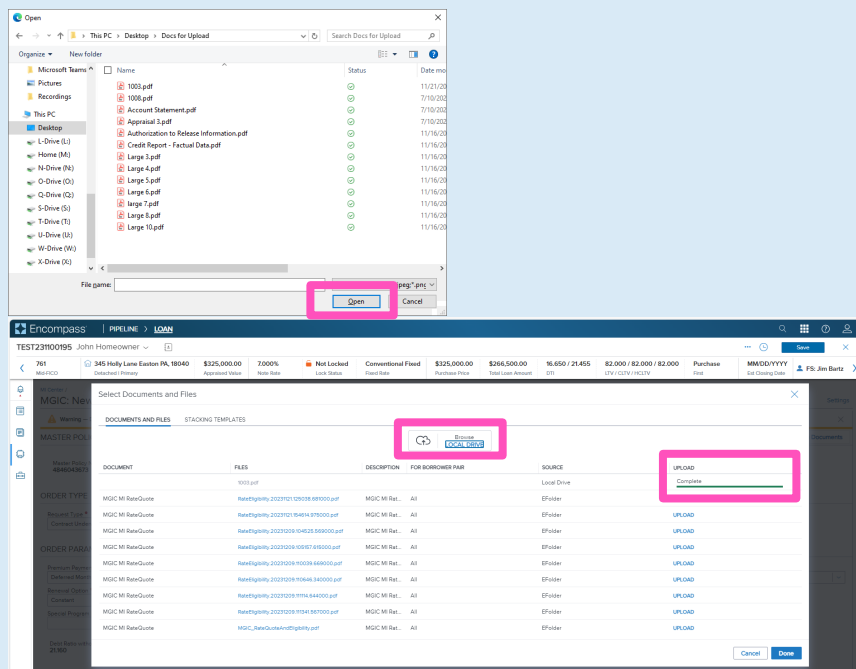
Contents of the eFolder will display on the **DOCUMENTS AND FILES** tab. Click the **UPLOAD** link to attach any of these files.

Click the drop-down list on the **STACKING TEMPLATES** tab to view and select a stacking template created by your system administrator.

You may also attach documents saved locally by clicking the **Browse LOCAL DRIVE** link on the **DOCUMENTS AND FILES** tab.

Use your file explorer to navigate to the appropriate drive, select the document(s) you wish to attach, and click the **Open** button.

The **UPLOAD** status bar will show you the progress of the upload. Make sure all files have completed the upload process, and click the **Done** button when finished.



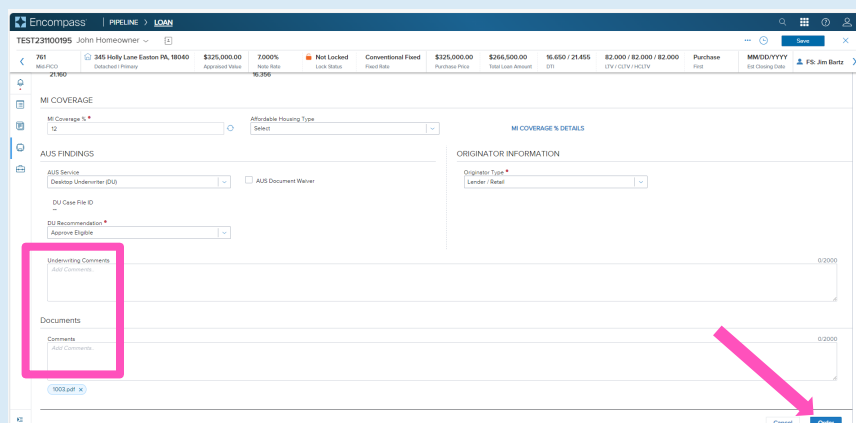
4. Order Contract Underwriting

Once you attached the necessary documents, verify all required fields are completed and all data is accurate.

Enter any pertinent Underwriting and/or Document comments in the appropriate fields.

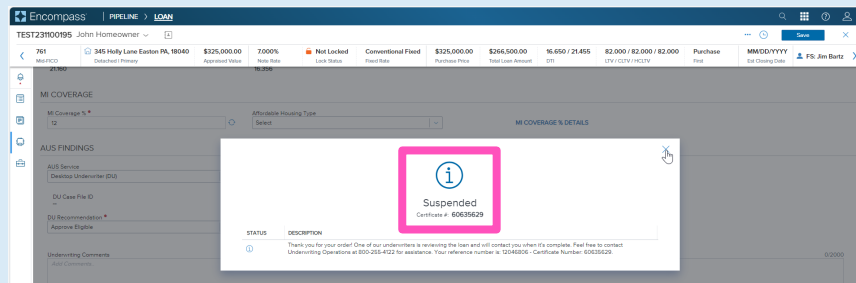
Click the **Order** button at the bottom of the screen.

A spinner will appear to let you know the request is being submitted.



A status message will appear when the request has processed. The message will include the reference and certificate numbers.

Close this message to return to the **Order Summary**.



5. Check Status

If your loan is Suspended upon submission, an MGIC underwriter will be in contact with questions or status updates.

Once they advise you that your loan is approved, the order status will update:

- If you are active in the loan file, click the **CHECK STATUS** button.
- If you are not active in the loan file, the status will be updated with the decision and imported rates with no manual intervention required.

Note – You may also **Check Status** from the **Order History** screen by clicking the elipsis on the far right of the row with the order.

A completion message will appear in the upper right corner and the **Order Status** will update.

Encompass | PIPELINE | LOAN

TEST23H0095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$265,500.00 16.650 / 21.455 82,000 / 82,000 / 82,000 Purchase Plan MM/DD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order Summary

CUW Reference #: 60635629

OVERVIEW | DOCUMENTS RECEIVED (0) | DOCUMENT UPLOADS (0)

CUW Order Status: Suspended

Imported Rates

Percent %	Amount	Duration
Initial Premium at Closing	-	-
First Renewal	-	-
Second Renewal	-	-
Rates Imported On	-	-

Rates

PRODUCT	INITIAL PREMIUM AT CLOSING	PERCENT %	AMOUNT	DURATION	FIRST RENEWAL	PERCENT %	AMOUNT	DURATION	SECOND RENEWAL	PERCENT %	AMOUNT	DURATION
Borrower Paid Monthly	0.000000%	\$0.00	-	-	0.000000%	\$22.21	120 Months	0.000000%	\$22.21	240 Months	-	-

RESUBMIT ORDER CHECK STATUS

Encompass | PIPELINE | LOAN

TEST23H0095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$265,500.00 16.650 / 21.455 82,000 / 82,000 / 82,000 Purchase Plan MM/DD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order History

MI Orders

ORDER DATE	ORDER NUMBER	PROVIDER NAME	ORDER TYPE	EXPIRATION DATE	STATUS
01/10/2024 07:29 AM	60635629	MGIC	Contract UW with MI	-	Suspended
12/10/2023 08:40 AM	4212PRT	MGIC	Multi Quote	03/10/2024	Scores
12/10/2023 08:40 AM	M23465234672025U	National MI	Multi Quote	03/10/2024	Rate board
12/10/2023 08:40 AM	6774489.1	Essex	Multi Quote	03/10/2024	Eligible

View Order Summary
Resubmit Order
Check Status

Encompass | PIPELINE | LOAN

TEST23H0095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$265,500.00 16.650 / 21.455 82,000 / 82,000 / 82,000 Purchase Plan MM/DD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order Summary

CUW Reference #: 60635629

OVERVIEW | DOCUMENTS RECEIVED (0) | DOCUMENT UPLOADS (0)

CUW Order Status: Approved

Imported Rates

Percent %	Amount	Duration	
Initial Premium at Closing	0.000000%	\$0.00	0 Months
First Renewal	0.000000%	\$22.21	120 Months
Second Renewal	0.000000%	\$22.21	240 Months
Rates Imported On	01/10/2024 @ 07:37 AM by Jim Bartz	-	-

Rates

PRODUCT	INITIAL PREMIUM AT CLOSING	PERCENT %	AMOUNT	DURATION	FIRST RENEWAL	PERCENT %	AMOUNT	DURATION	SECOND RENEWAL	PERCENT %	AMOUNT	DURATION
Borrower Paid Monthly	0.000000%	\$0.00	-	-	0.000000%	\$22.21	120 Months	0.000000%	\$22.21	240 Months	-	-

RESUBMIT ORDER CHECK STATUS

Success Check Status Completed

6. View Contract Underwriting Order

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 also provides rate details and messaging returned by MGIC with the Certificate Number and new Quote ID.

Encompass | PIPELINE | LOAN

TEST23H00095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$266,500.00 16.50 / 21.35 82,000 / 82,000 / 82,000 Purchase MWD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order Summary

CUW Reference #: 60635629

OVERVIEW DOCUMENTS RECEIVED (0) DOCUMENT UPLOADED (0)

CUW Order Status: Approved

ACTIVE ORDER

Imported Rates

	Percent %	Amount	Duration
Initial Premium at Closing	0.000000%	\$0.00	0 Months
First Renewal	0.100000%	\$22.21	120 Months
Second Renewal	0.100000%	\$22.21	240 Months

Rates

PRODUCT	INITIAL PREMIUM AT CLOSING	PERCENT %	AMOUNT	DURATION	FIRST RENEWAL	PERCENT %	AMOUNT	DURATION	SECOND RENEWAL	PERCENT %	AMOUNT	DURATION
Borrower Paid Monthly	0.000000%	0.000000%	\$0.00	-	0.100000%	0.100000%	\$22.21	120 Months	0.100000%	0.100000%	\$22.21	240 Months

MGIC Messages

You may use the **RESUBMIT ORDER** link at the top left of the **Order Summary** screen to resubmit your request.

Note – The **RESUBMIT ORDER** link will only appear if this is the active order. Select the desired order from the **Order History** screen in the **MI Center** to make it the active order.

Encompass | PIPELINE | LOAN

TEST23H00095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$266,500.00 16.50 / 21.35 82,000 / 82,000 / 82,000 Purchase MWD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order Summary

CUW Reference #: 60635629

OVERVIEW DOCUMENTS RECEIVED (0) DOCUMENT UPLOADED (0)

CUW Order Status: Approved

ACTIVE ORDER

Imported Rates

	Percent %	Amount	Duration
Initial Premium at Closing	0.000000%	\$0.00	0 Months
First Renewal	0.100000%	\$22.21	120 Months
Second Renewal	0.100000%	\$22.21	240 Months

Rates

PRODUCT	INITIAL PREMIUM AT CLOSING	PERCENT %	AMOUNT	DURATION	FIRST RENEWAL	PERCENT %	AMOUNT	DURATION	SECOND RENEWAL	PERCENT %	AMOUNT	DURATION
Borrower Paid Monthly	0.000000%	0.000000%	\$0.00	-	0.100000%	0.100000%	\$22.21	120 Months	0.100000%	0.100000%	\$22.21	240 Months

MGIC Messages

The **DOCUMENTS RECEIVED** tab allows you to view the Notice Of Loan Approval PDF.

The Notice Of Loan Approval (NOLA) PDF will have already auto-saved to the document folder. This is just a method to view it.

Encompass | PIPELINE | LOAN

TEST23H00095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$266,500.00 16.50 / 21.35 82,000 / 82,000 / 82,000 Purchase MWD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order Summary

CUW Reference #: 60635629

OVERVIEW DOCUMENTS RECEIVED (2) DOCUMENT UPLOADED (0)

Document Name

60635629.20240110.073730.596000.pdf

1 100% Download

NOTICE OF LOAN APPROVAL

January 10, 2024

ATTN: CLIENT

BORROWER: HOMEOWNER JOHN SMITH
MGIC LOAN: 60635629
LOAN PROPERTY: 345 HOLLY LANE, EASTON, PA, 18040

This mortgage loan has been approved on behalf of the above noted client with the following terms and conditions.

File Reference: 1001 Loan Number: TEST231100095 Registration Loan Number:

The **DOCUMENT UPLOADED** tab displays details of documents uploaded:

- PACKAGE SENT (date/time)
- COMMENTS
- STATUS
- DOCUMENTS (list)
- POST CLOSING (indicator)

Encompass | PIPELINE | LOAN

TEST23H00095 John Homeowner

761 345 Holly Lane Easton PA, 18040 \$325,000.00 7.000% Not Locked Conventional Fixed \$325,000.00 \$266,500.00 16.50 / 21.35 82,000 / 82,000 / 82,000 Purchase MWD/YYYY FS: Jim Bartz

Mortgage Insurance Center: Order Summary

CUW Reference #: 60635629

OVERVIEW DOCUMENTS RECEIVED (0) DOCUMENT UPLOADED (1)

PACKAGE SENT

01/10/2024 07:37 AM

COMMENTS

STATUS

Completed

DOCUMENTS

1003.pdf

POST CLOSING