

# Quick Guides – Admin Setup in Encompass Partner Connect<sup>™</sup>

Last Revised Date: 12/05/2024

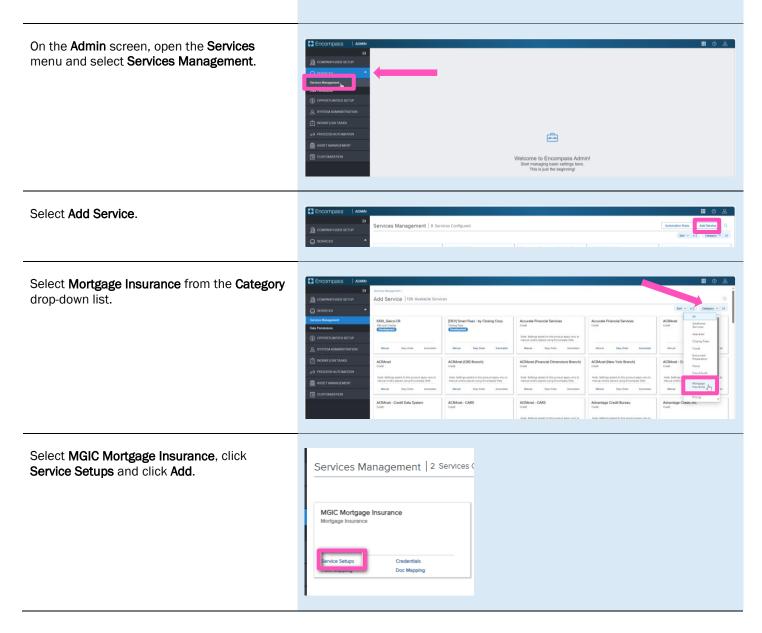
### 1. Access Web Settings

There are two ways to access Web Settings. In EPC, select <b>Admin</b> from the waffle menu in the upper right corner.	
In EMN, navigate to <b>Encompass Settings</b> . Click <b>Web Version Settings</b> .	Incompass       View       Home         Home       Encompass       Settings         Home       Encompass       Recent       Import         Home       Encompass       Settings       Overview         Velc       Settings       Overview       The features and tools on the Company         External       Company Setup       Investor       Encompass       Web Version         External       Connect Setup       Encompass       Web Version       Settings         External       Connect Setup       Encompass       Web Version       Settings         Fai       Secondary Setup       Encompass       Configuration



MGIC

## 2. Setup Steps



You will be directed to the **Add Manual Setup** screen.

- a) Click the **Active** button to turn the service on.
- b) Enter a Service Setup Name.
- c) Click the Add button to open the Add Entities window.
- d) Once you've mapped users and closed the Add Entities window you will be returned to this screen. Click Save.

Sevias Mengenent/Sevias Secan./				
Add Manual Setup				a 🗔
Genite Type Mangage Insurance	Evaluation Level Loan Level		Provider MGRC Mongage Insurance	
anta Sela News* MDC Morgage Inscience		Service Setup Description		
Readiness Conditions				Validate
Authorized Users*				
0	NAME	TYPE	ACTION	
Test same 0		No Results Found.		
		R		
				d 📼

In the **Add Entities** window, select the user(s) you want to map from the **Category / Users** column and move them to the **Selected Users** column by clicking the **Arrow** icon. Click **Add**.

You will be returned to the **Add Manual Setup** screen. As stated in the previous step, you will need to click the **Save** button on that screen.

Note – If you need to remove a user from the **Selected Users** column, click the **X** button next to their name and they will be moved back to the **Category / Users** column.

stegory / Users		Q	Selected Users		
Brian Madden (bmadden)		*	(a) Mary K Adler (mary)	۰	
App Dev (appdev1)	-		<ul> <li>Jim Bertz (jimbertz)</li> </ul>	•	
Anusha Gundu (anusha)	-		(a) Evelyne Nimmo (evelyne)	۰	
anthony pecors (anthony)	-		(a) Lee Swanson (Iswanson)	•	
Andrea Hudock (andrea)	-		<ul> <li>(arry Tran (larry)</li> </ul>	•	
Alexis Panaro (alexis)			(a) Leslie Bensen (leslie)	•	
Mike Mueller (admin)	-				
Accounting User (accounting)		Ţ			
			CLEAR ALL	6/200	

On the MGIC Mortgage Insurance Service Setups screen, click the **Credentials** button.

The Add Company Credentials window will open. Enter your MGIC **Master Policy Number** and a **Master Policy Number Description**. Click **Save**.

Add Company Credentials	×
Master Policy Number *	
Master Policy Number Description  MGIC	_

## 3. Admin Settings

From within a loan, go to the **MGIC: New Order** or **MGIC: Edit Order** screen. Click the **Settings** link in the upper right corner.

	200275 Patrick Firstimer & Mary Firstimer ~	4									··· ©	Save	
MidF	CO Detached I Primary	\$650,000.00 Approised Value		Not Locked Lock Status	Conventional Fixed Fixed Rate	\$340,000.00 Purchase Price	\$299,200.00 Total Loan Amount	16.050 / 24.240 DTI	88.000 / 88.000 / 88.00 LTV / CLTV / HCLTV	D Purchase First	MM/DD/YYYY Est Closing Date	🚨 FS: Mary I	ĸ
	GIC: New Order ①											1	5
M	ASTER POLICY INFORMATION												-
	Mastar Policy Number mgic i 4846043673		wich ID Smart Lending I 48	846043673									
OF	RDER TYPE												
	Request Type * Rate Ouote	- O											
	RDER PARAMETERS		sit Premium Up Fr	ront Rate		Premium				Option *			
	Deferred Monthly Renewal Option *					Borrow	er Paid		V Not R	efundeble			
	Constant		Premium Finan			🗌 Relo	cetion Loan						
	Special Program ID		voice Monthly Upl	front Premium		0							
	Debt Ratio without MI 24.025		fousing Ratio with 5.835	out MI									
м	COVERAGE												
	Mi Coverage % * 25		Tordable Housing Select	Type			MI COV	ERAGE % DETAILS					
	JS FINDINGS					ORIG	NATOR INFORM	MATION					
	75 FINDINGS												

The **Admin Settings** window will open. Setting options are available for the following categories:

- Branches
- Premium, Refund and Renewal Options
- Premium Payment Plan
- Persona Ordering Permissions
- MI Coverage Percentage

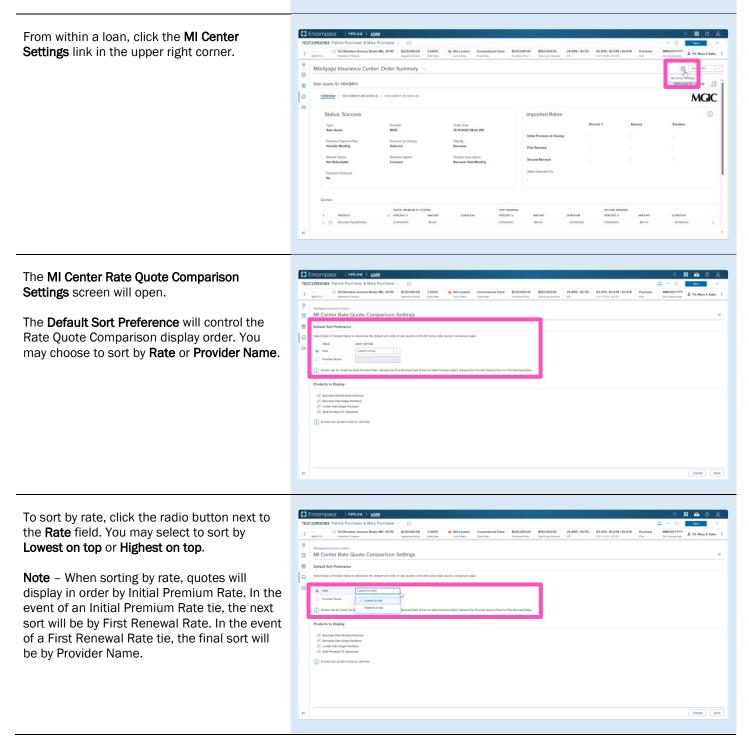
Adjust the settings as applicable to add/edit/remove options as well as set default values.

Once you have adjusted the settings, click **Save**.

**Note** – Though these settings are accessed within a loan, they are global settings.

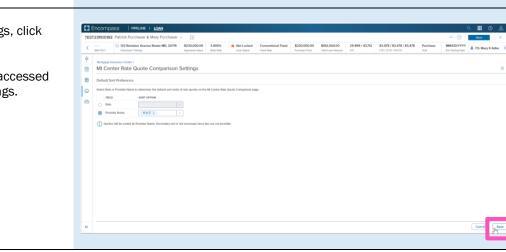
T23120	00275 Patr	rick Firstimer & Mary	Firstimer 🤟	•								- 0	Sava
Marito	0 Det	08 Frosty Lane Greenabo advot : Primary	110 NC, 27455 \$	650,000.00 6.500% (protect Value Page Rate		Locked Conventional Fixed	\$340,000. Purchase Pro	00 \$299,200.00 Total Loan Annual	96.050 / 24.240 (III)	BE.000 / BE.000 / BE.	000 Purchase	MM-DD/YYYY Est Classing Date	1 FS: Mary K.A.
11.24													
Contraction of the													
max		T INFORMATION											
	Master Plates fe	umbat .		Rangh D									
		Admin Settings											×
ORC	DERITYPE	Branches										AD	
1	Tota Custa	La orientes											
		Smart Lending		ст		8 /							
OR	DER PARA	Banch D 49460	543673	Danis D	48460335								
	antier Payros	(S) Celevit		Lil Detec									
10.04	Defanad Mundi anause Option 1	Premium, Refund a	and Renewal Opt	tions									
	Constant	Premium Paid B	v			Refund Option			Rena	wal Option			
34	eriel Priserei	Sector fire factor to access		Salected Calacit		Interfaction corporation		tariaction (Dalmant	factory of the	a Barton for assessar for the last	Saturdad Dates		
		Eprissier Paul		Borrover Paid		Refundatio     Not Refundation			- C C 6	salant (Ening / Amartaing	Constant		
	No.025									Renevals			
1	Premium Payment Plan							Split Premium					
	Rata Quella	Defensed Manshiy	In the flat		Deterred			0.50%		Defective 0.50%			10
		Single						0.75%					
1 million	DER PARAL	Annual					2	129%					
	Defensed Munit							180%					
No.	ermont Option	Premium Financ	ed										
	Constant Decised Prosperation	D Premum Pinances											
10.50	DER TYPE	Persona Ordering	Demissions										_
	muner fyres *												_
	Reto Quette	Apply Persons Permiss											
10000		PERSONA Accounting		RATE QUOTE		OELEGATED		IN DELEGATED	- CONT	RACT UNDERWRITING	RETRIEVE MIC	ERTIFICATE	÷.
.ORI	DER PARA	Administration				2	2		2		8		
	Annual Payment	Closer	9			8	2		2		2		
	anavai Ciptore	Funder				9	1		2		2		
	Constant Incod Program	Loan Officer											5 g 👘
	verating loans												
2.20	eranas Option ( Constant	MI Coverage Pero											-
1 1 2 2	and Property	· reste Mee	C revue Mac										
201			FNMA STANDAR			HLMC STANDARD COVERAGE		HOME READY / HOME P		HFA CHARTER			
1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	and the second second	BASELTV 95.075-97.005	TERM > 20 YEARS O	R ARM TERM -> 20 YEA	ues t	ERM > 20 YEARS OR ARM TERM ~	20 YEARS	TERM > 20 YRS OR ARM		ANY TEAM			
8 14 2 2	HALD 25			36		10 25			25	14 56			
1 2 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1	22236 555557/1556	AD 488 (07 008)		20		10 25 25 12			25	10			
1 2 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1	A D25	90.0% - 95.00%	30	1.00				25	14	14			
2 80 8 10 10 10 10 10 10 10 10 10 10 10 10 10	COVERAG	85.0% - 90.00%	25	12				10	а.	÷			
2 80 8 10 10 10 10 10 10 10 10 10 10 10 10 10	COVERAGI			12 6		a 4 2 6		12	6	6			
2 2 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	COVERAG	85.0% - 90.00%	25					ų	4	é.		Cancel	50.00

#### 4. Rate Quote Comparison Settings



Encompass | PIPELINE > LON To sort by provider, click the radio button next to the Provider Name field. You may select to 25.899 / 43.712 83.478 / 83.478 / 83.478 123 Reindeer Avenue Bowie MD, 20715
 5230,000.00
 3.000%
 Enter Avenue Bowie MD, 20715
 Status
 Detected Please
 Lock Setue
 Plead B al Fixed \$230,000.00 \$192,000.00 sort by A to Z or Z to A. Ģ . MI Center Rate Quote Comparison Settings 1 Note - When sorting by provider, no 0 secondary sort is necessary as ties are not possible. Cancel Save 1 E The **Products to Display** setting will control the products displayed for a Rate Quote Comparison order. Click the appropriate Ģ MI Center Rate Quote Comparison Setting check box for the products you would like to 9 add to, or remove from, the Rate Quote 0 Comparison. Note - The Order Summary screen will also only include the products configured to display. Cancel Sove Enc Once you have adjusted the settings, click Save.

**Note** – Though these settings are accessed within a loan, they are global settings.



#### 5. Setting MI Center Persona Permissions in EMN

