

Submitting Documents to National MI

# Encompass User Guide Delegated

Dated: October 2016

## Submitting Documents to National MI – Delegated

National MI offers the convenience of uploading your underwriting package and closing documents from within Encompass®, in accordance with our Delegated Assurance Review.

### National MI Request Page: Check Status/View Results Tab

A. Since you've previously ordered your delegated commitment, navigate to the **Check Status/View Results** tab from the Request Page.

The screenshot shows the 'National MI Request' application window. The 'Check Status / View Results' tab is selected and highlighted with a red box and a red circle labeled 'A'. The page contains several sections: 'Branch Login Information' with fields for Master Policy Number (99983-0001), Branch ID (elliemae1), and Branch Password; 'Loan Information' with fields for Borrower (John Homeowner), CoBorrower (Mary Homeowner), and Loan Number (1610000051); 'Request Type' set to 'Non-Delegated Application'; 'Mortgage Insurance Information' with dropdowns for Premium Payment Type (BorrowerPaid), Premium Payment Plan (Monthly ADVANTAGE), Refund Type (No Refund), and Renewal Option (Constant); and 'Additional Loan Information' with fields for Special Program ID and Special Pricing ID. A red circle labeled 'A' points to the 'Check Status / View Results' tab.

B. In order to identify and upload your underwriting package & closing documents, please click **Upload**.

The screenshot shows the 'National MI Request' application window with the 'Check Status / View Results' tab selected. A table displays the order details, with the first row highlighted in blue and a red box around it. A red circle labeled 'B' points to the 'Upload' button at the bottom of the page. The table data is as follows:

Order No.	Order Date	Product Name	Status
1000320102	10-04-2016 10:29:42 AM	Mortgage Insurance - Delegated	Approved
NOTE/QUOTE 1	10-04-2016 10:29:37 AM	Note Quote	approved

A red circle labeled 'B' points to the 'Upload' button at the bottom of the page.

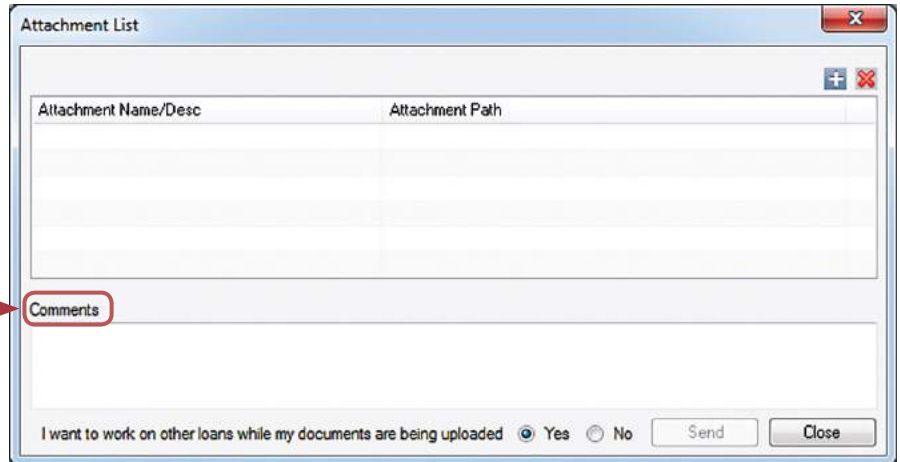
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- C. The **Attachment List** popup window will appear which will allow the user to select documents. The **+** icon will allow the user to select the documents and the **✖** icon will delete the file from the below list. The **Comments** panel is information for the user to enter (NOTE—comments entered here **will not** be visible to National MI). Additionally, the entries will be displayed on the **Document Upload History**.

C

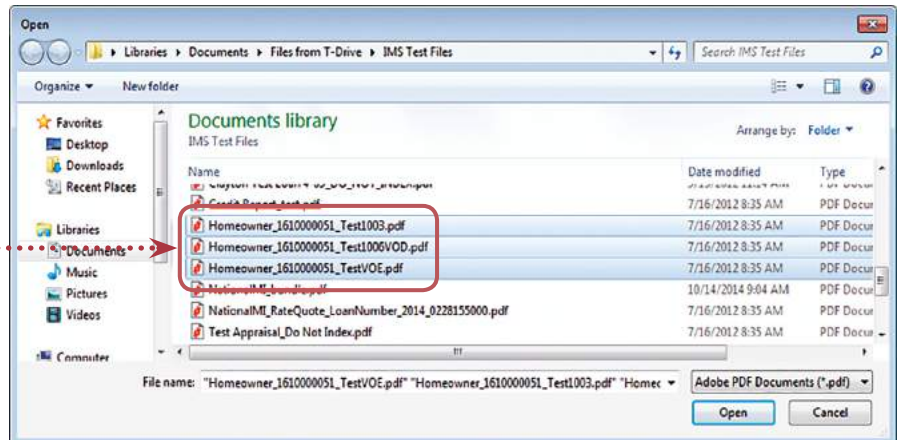


When the user clicks the **+** icon, the Attach window is displayed for the user to browse the location from where to select the files.

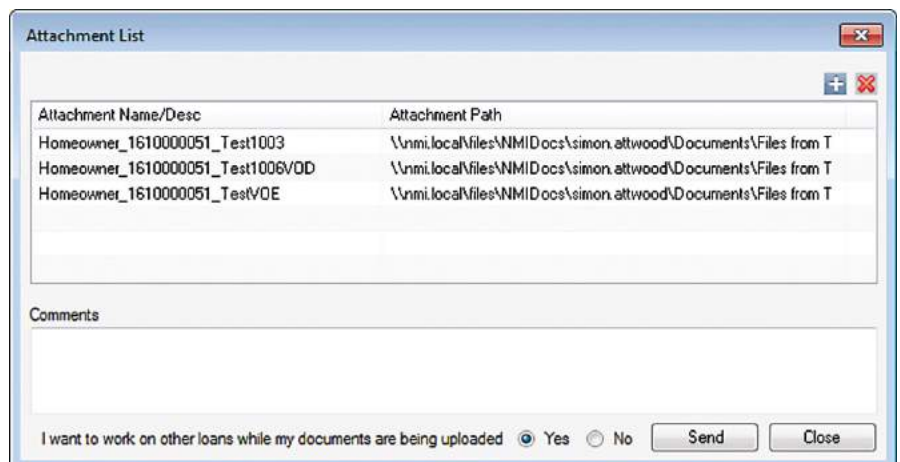


- D. If the **Browse from Hard Drive** option is selected, the user can select the folder and files to be uploaded. Documents can be multi-selected to be uploaded at the same time.

D



By clicking on the **Open** button, the selected files will be listed in the **Attachment List** window.



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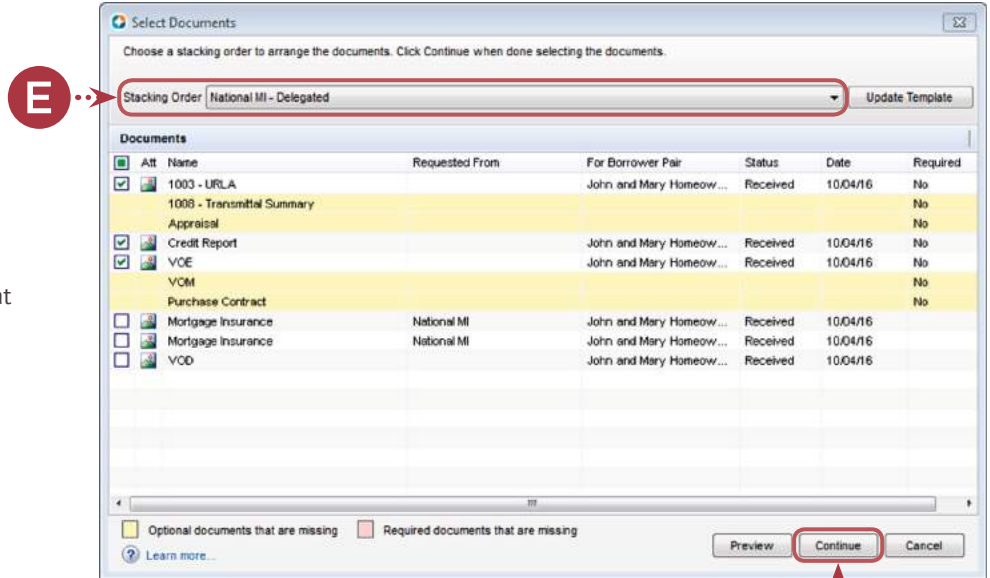
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E. If the **Browse from Encompass eFolder** option is selected, the user can perform the following:

1. By selecting a **Stacking Order** (created by your Encompass Admin), it will pre-select the applicable documents in your Documents list. You can also “check” any other documents that you would like to provide.

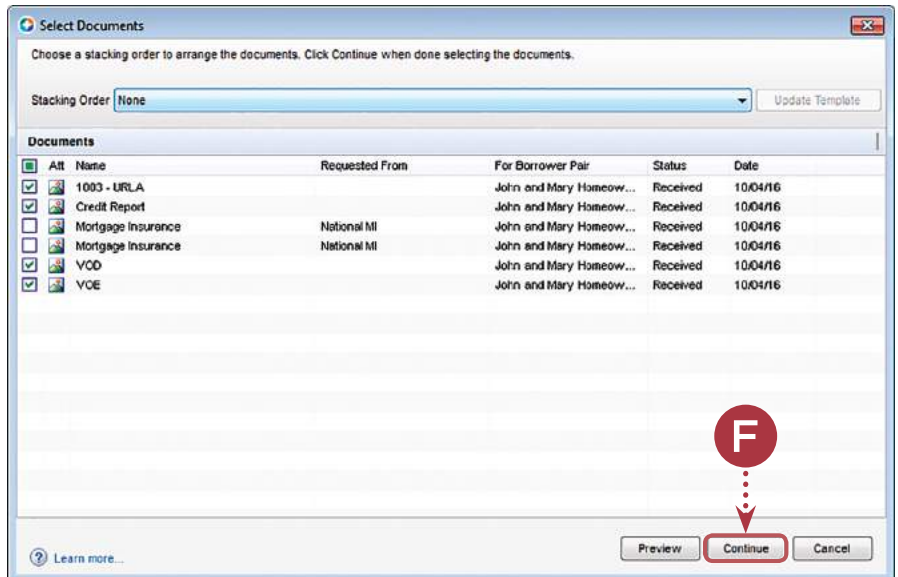
**Note:** A Required Documents for Delegated list can be found at: [www.nationalmi.com/resources/#documents](http://www.nationalmi.com/resources/#documents)



F

If the user does not have (or want to use) a stacking order, they can merely select the **checkbox** next to each doc they want to include.

- F. Once all of the necessary documents have been selected, please select **Continue** to return to the **Attachment List** window.



F

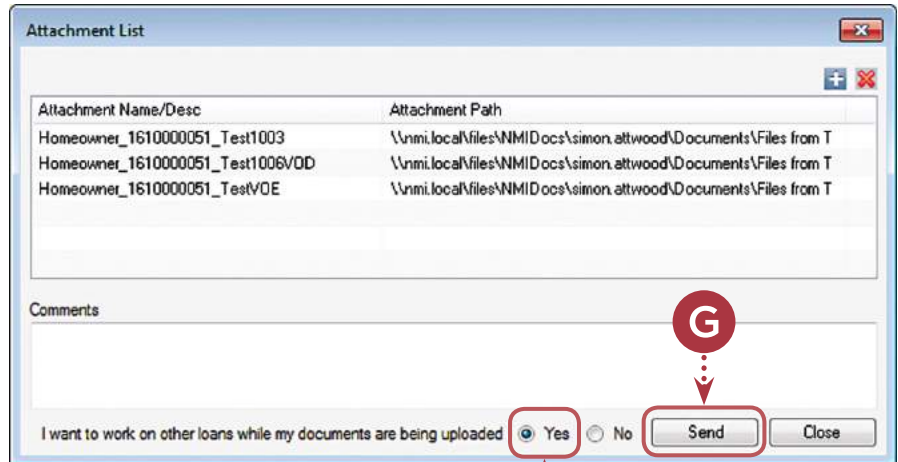
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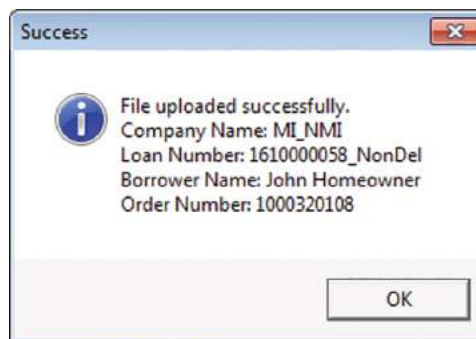
**G.** Clicking on the **Send** button will start the transfer process.

Select **“Yes”** to ensure you’re able to continue working on this loan, or other loans, in Encompass while your documents are being uploaded to National MI.



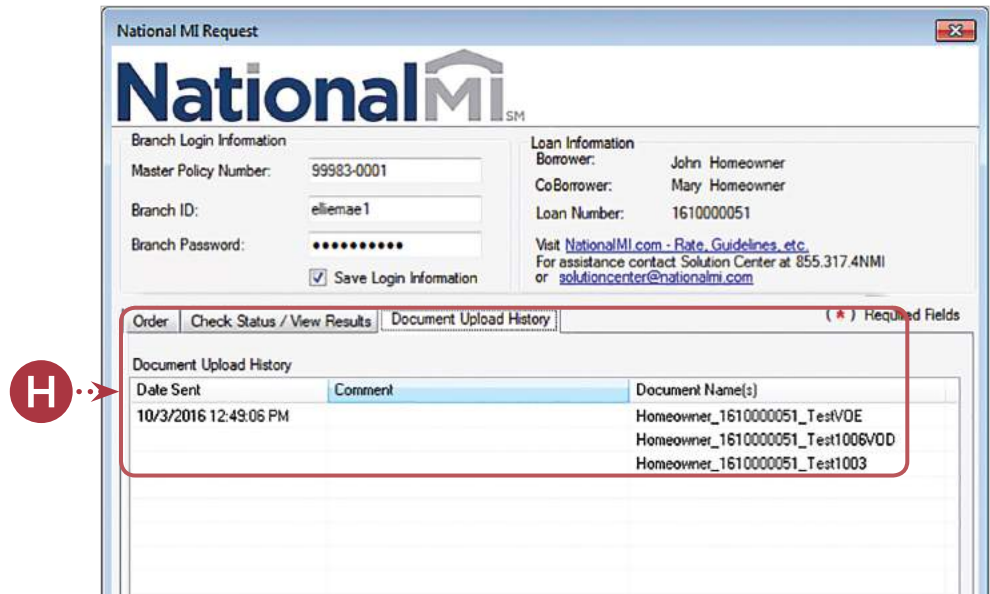
### Successful upload message:

Additionally, National MI will send you an e-mail, shortly after the **Success** message window is provided, confirming receipt of your loan documents.



### Document Upload History

**H.** Documents uploaded to National MI via Encompass will be displayed under the **Document Upload History** tab with the date and time that they were sent, along with any comments that were added at the time of upload. **\*Remember** – comments added in conjunction with document uploads are not visible to National MI.



Please contact the Solution Center ([solutioncenter@nationalmi.com](mailto:solutioncenter@nationalmi.com)/855.317.4664) if you have any questions.