

Submitting Documents to National MI

# Encompass User Guide Non-Delegated

Dated: October 2016

## Submitting Documents to National MI – Non-Delegated

National MI offers the convenience of uploading documents from within Encompass®.

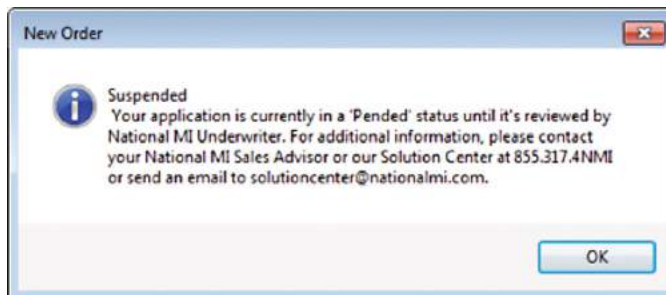
### National MI Request Page/Order Tab

- A. Select the **Request Type** to submit a Non-Delegated Application, and click **Order** (NOTE: Documents are uploaded after the initial order).

The screenshot shows the 'National MI Request' window. A red circle with the letter 'A' points to the 'Request Type' dropdown menu, which is set to 'Non-Delegated Application'. Another red circle with the letter 'A' points to the 'Order' button at the bottom right of the form. The form contains the following fields:

- Branch Login Information:** Master Policy Number (99983-0001), Branch ID (elliemae1), Branch Password (masked), and a checked 'Save Login Information' box.
- Loan Information:** Borrower (John Homeowner), CoBorrower (Mary Homeowner), and Loan Number (1610000051).
- Mortgage Insurance Information:** Premium Payment Type (BorrowerPaid), Premium Payment Plan (Monthly ADVANTAGE), MI Coverage % (25), Refund Type (No Refund), and Renewal Option (Constant).
- Additional Loan Information:** Special Program ID, Special Pricing ID, and a 'Relocation Loan' checkbox.
- Originator Information:** Originator Channel (Retail) and Third Party Company Name.
- Recommendation:** DU Recommendation Type (Approve / Eligible), LP Credit Risk Class, and Purchase Eligibility.

The following message confirms a **successful submission** of the Non-Delegated application:



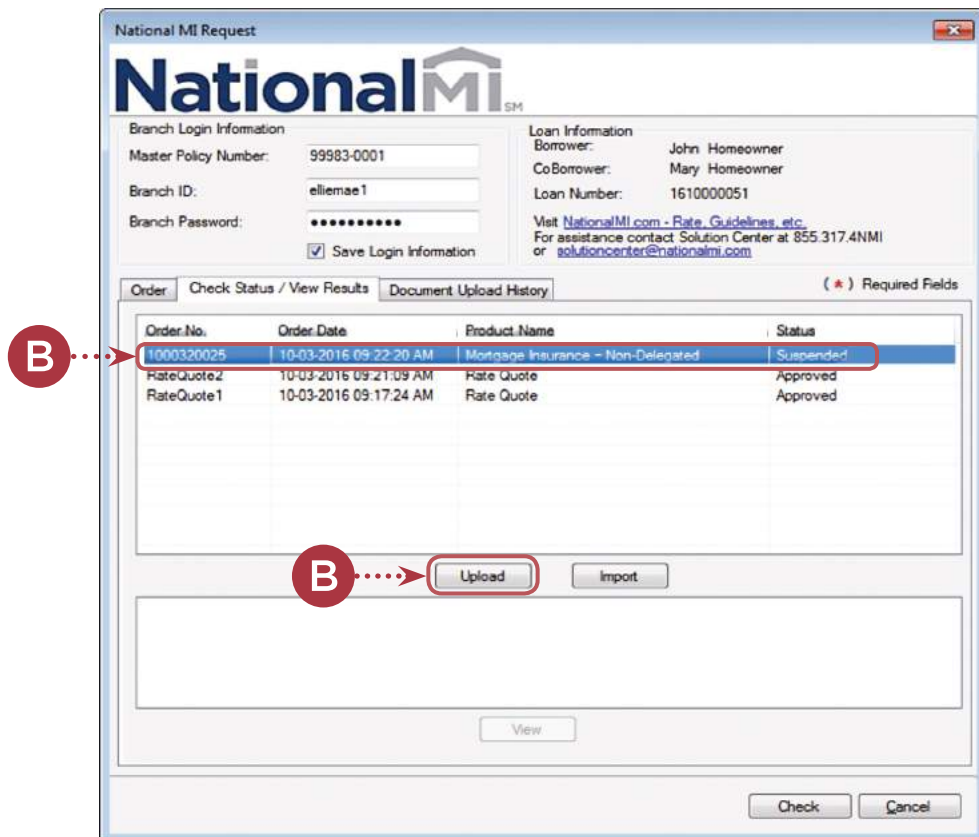
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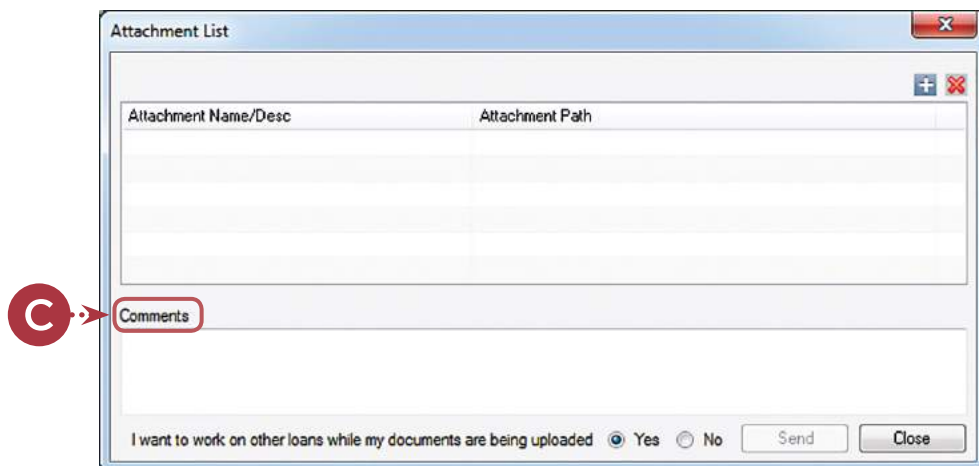
(Non-Delegated)

- B.** After the order submission has completed, you will be placed on the **Check Status/View Results** tab. National MI's Application Number will be displayed in the **Order No.** column, and the **Status** will display as **Suspended** until the applicable loan documents have been received and the loan is underwritten.

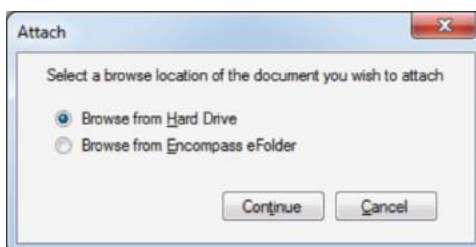
In order to identify and upload your loan documents associated with the MI order to National MI, please click **Upload** (NOTE: The process for providing the initial credit/appraisal package as well as follow-up conditions is the same).



- 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**.



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

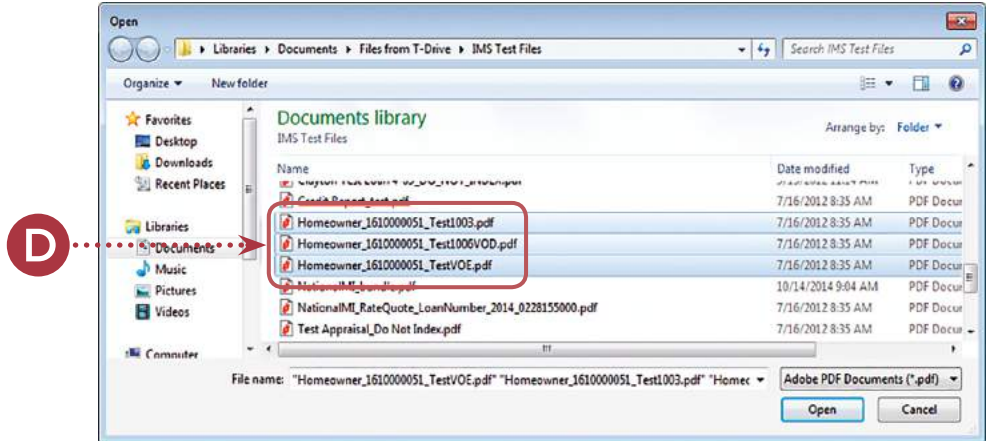


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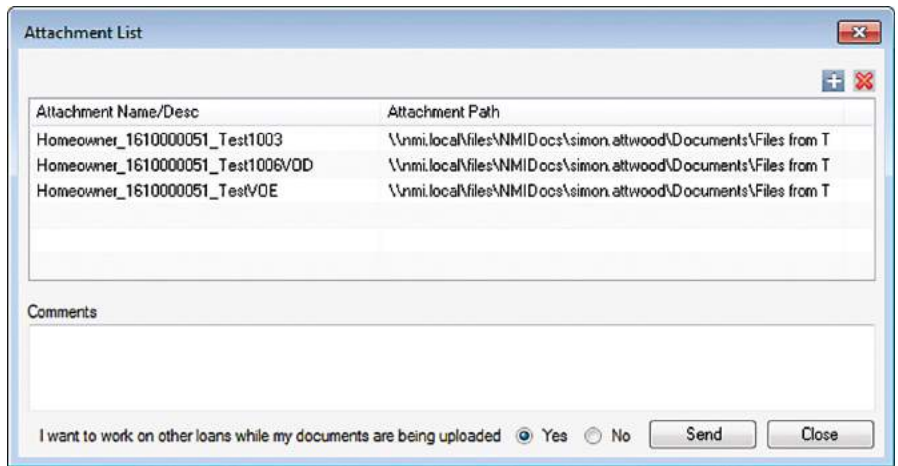
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D. If the **Browse from Hard Drive** option is selected, the user can select the folder and files to be uploaded, including Non-Delegated closing documents. Documents can be multi-selected to be uploaded at the same time.



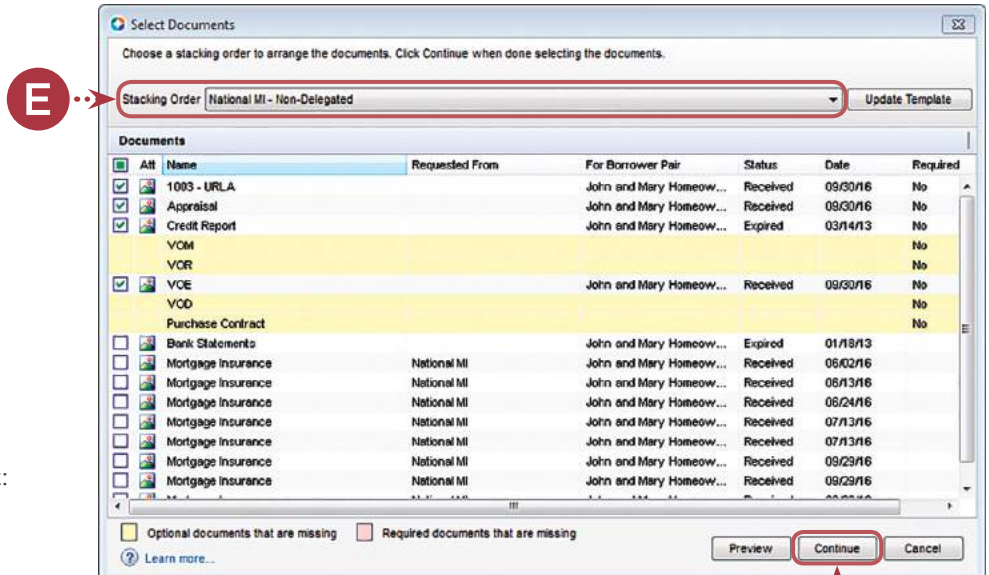
By clicking on the **Open** button, the selected files will be listed in the **Attachment List** window.



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, including Non-Delegated closing documents.

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



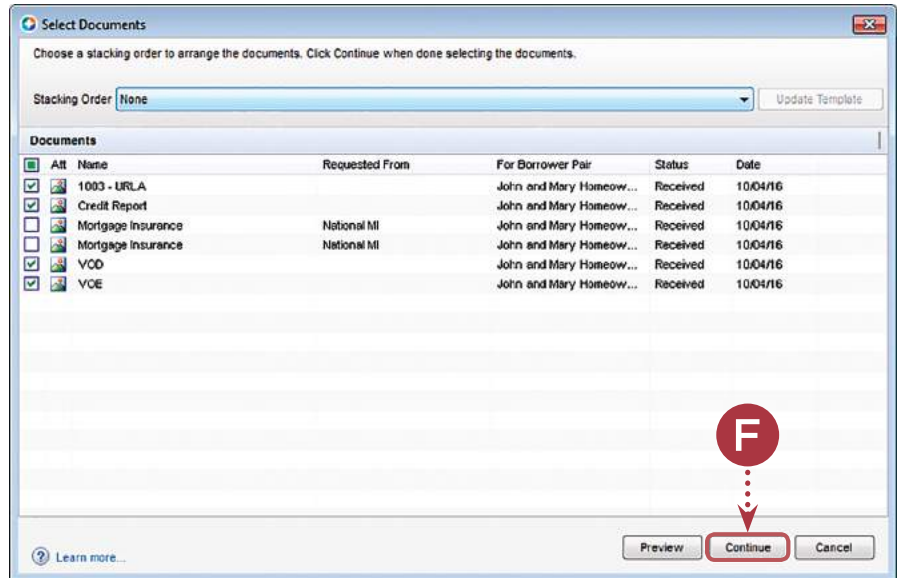
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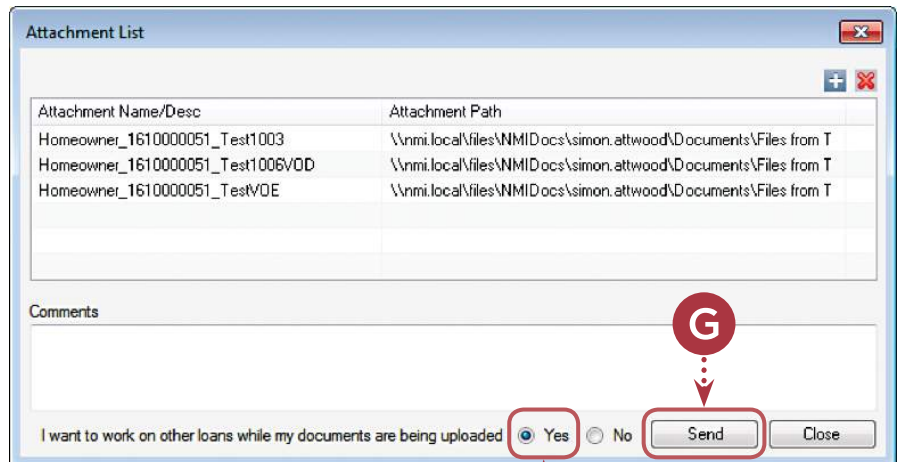
If the user does not have (or want to use) a stacking order, they can merely select the **checkbox** next to each doc they want to include.

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



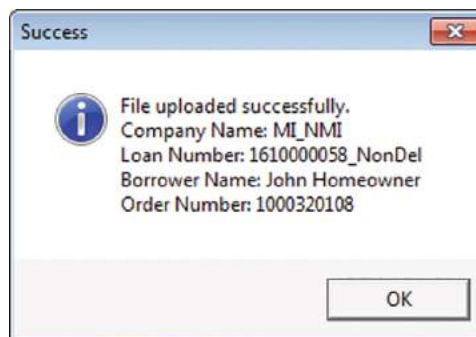
- G. Clicking on the **Send** button will start the transfer process.

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, and/or Non-Delegated closing documents.



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### 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.



The screenshot shows the 'National MI Request' application window. At the top, there is a header with the 'NationalMI' logo. Below the header, there are two main sections: 'Branch Login Information' and 'Loan Information'. The 'Branch Login Information' section includes fields for 'Master Policy Number' (99983-0001), 'Branch ID' (elliemae1), and 'Branch Password' (masked with dots), along with a 'Save Login Information' checkbox. The 'Loan Information' section includes fields for 'Borrower' (John Homeowner), 'CoBorrower' (Mary Homeowner), and 'Loan Number' (1610000051). Below these sections, there is a navigation bar with tabs: 'Order', 'Check Status / View Results', and 'Document Upload History'. The 'Document Upload History' tab is selected and highlighted with a red box. Below the navigation bar, there is a table with the following data:

Date Sent	Comment	Document Name(s)
10/3/2016 12:49:06 PM		Homeowner_1610000051_TestVDE Homeowner_1610000051_Test1006VDD Homeowner_1610000051_Test1003

At the bottom of the window, there are 'Finish' and 'Cancel' buttons.

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