National MI

Submitting Documents to National MI

Encompass®
User Guide
Delegated

Dated: June 2021

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.

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


Encompass® is a registered trademark of ICE Mortgage Technology™

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**.
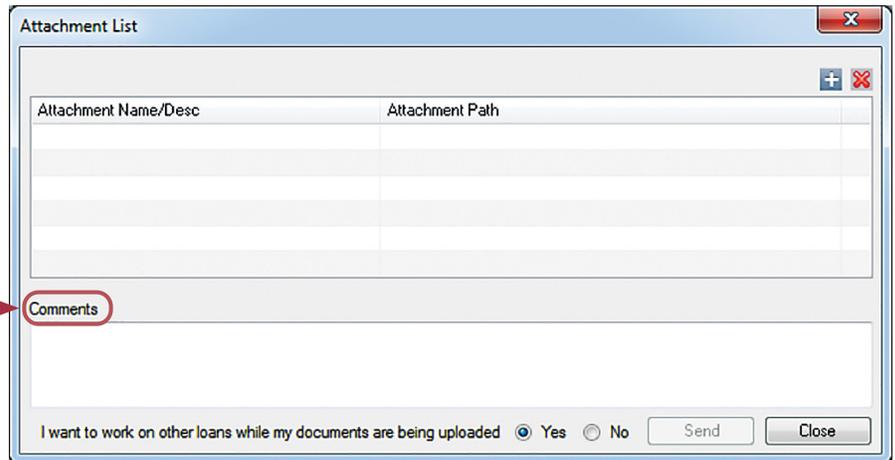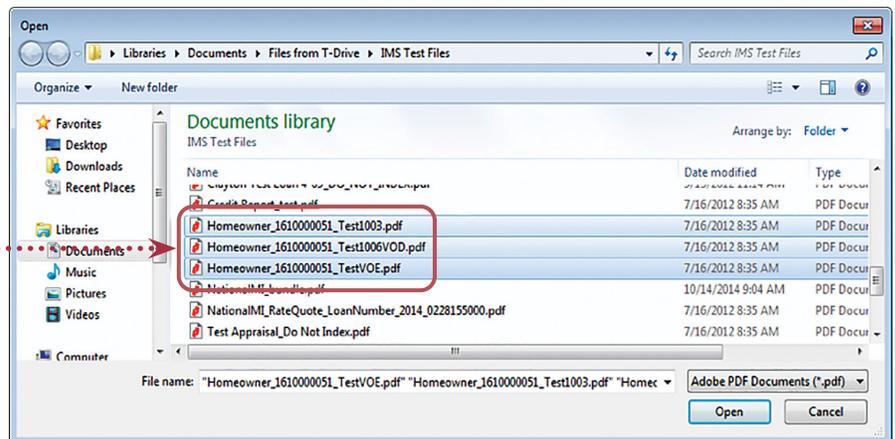
When the user clicks the ➕ icon, the Attach window is displayed for the user to browse the location from where to select the files.
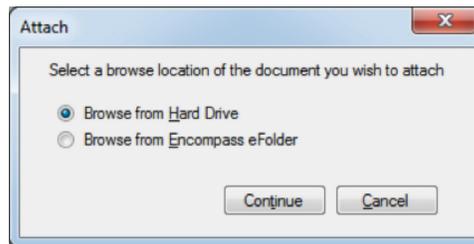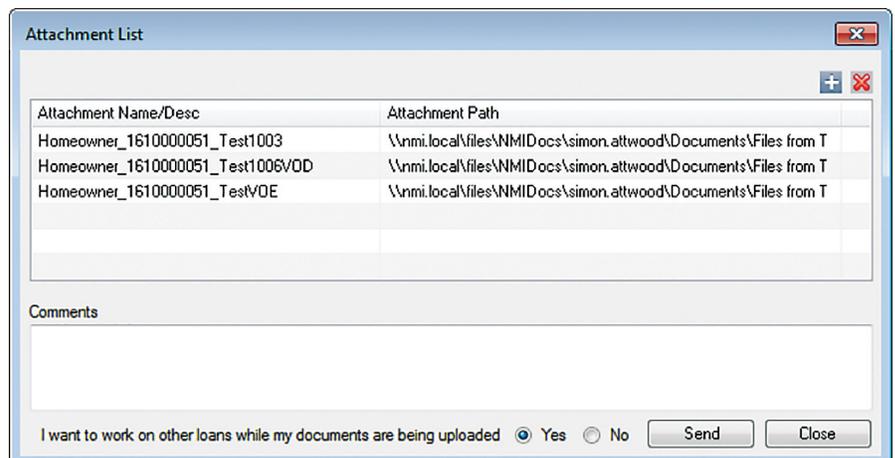
D. If the **Browse from Hard Drive** option is selected, the user can select the folder and files to be uploaded. Documents can be multi-selected to be uploaded at the same time.

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.
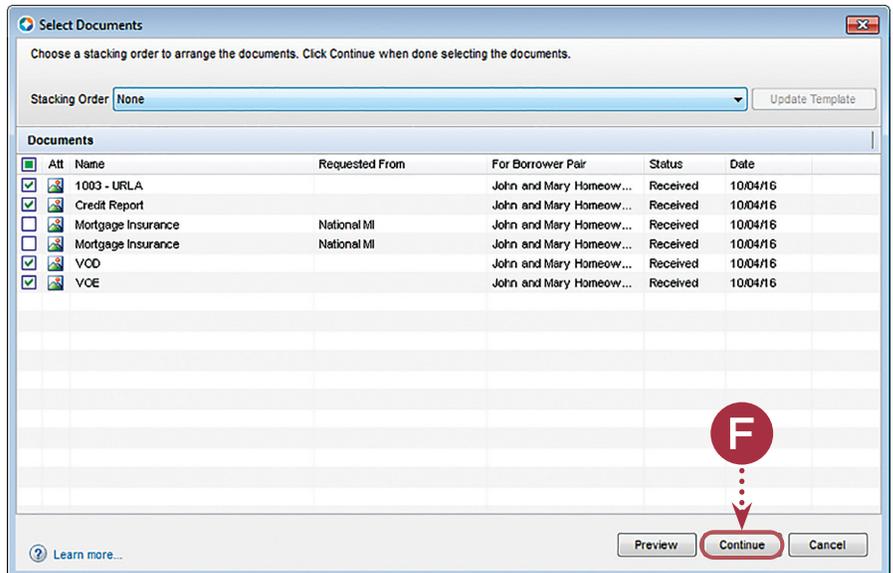
   Note: A Required Documents for Delegated list can be found at: www.nationalmi.com/ resources/#documents
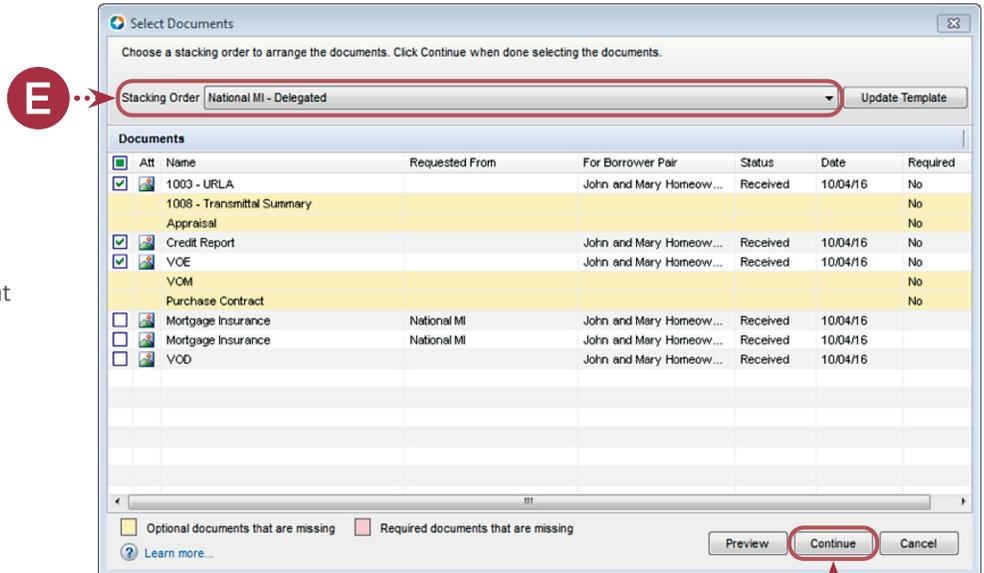
If the user does not have (or want to use) a stacking order, they can merely select the **checkbox** next to each doc they want to include.

F. Once all of the necessary documents have been selected, please select **Continue** to return to the **Attachment List** window.
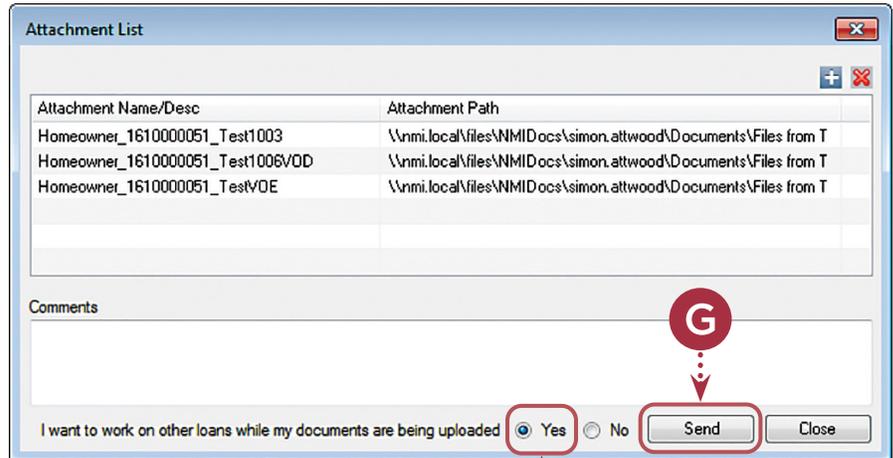
G. Clicking on the **Send** button will start the transfer process.

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.
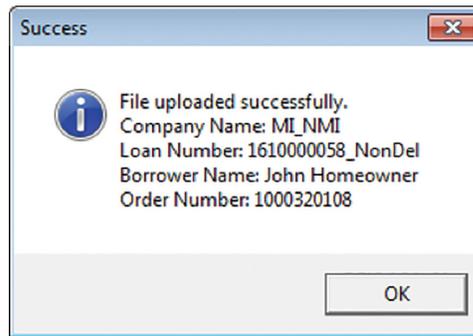
Document Upload History

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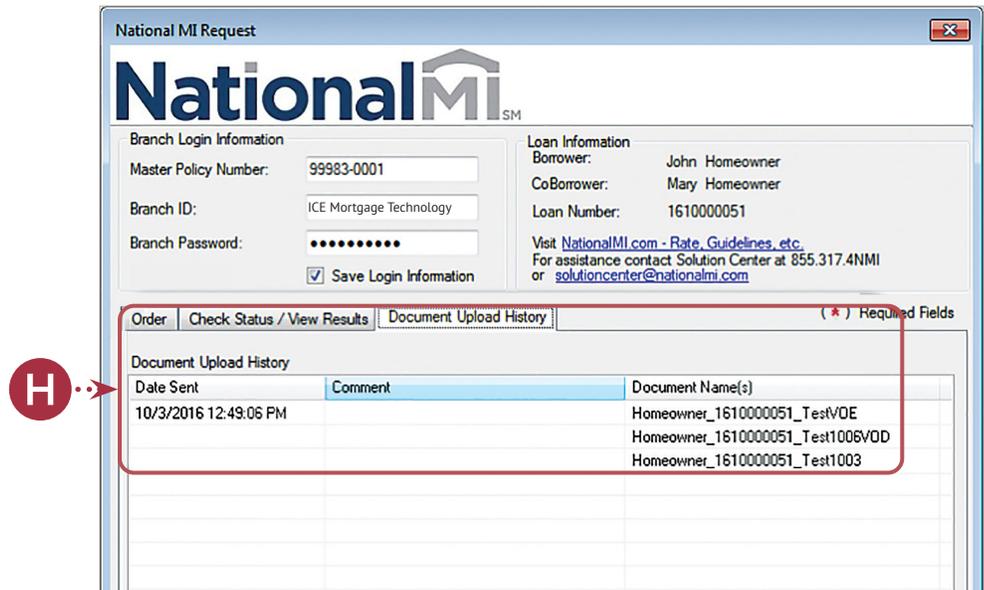
Please contact the Solution Center (solutioncenter@nationalmi.com/855.317.4664) if you have any questions.