National Mi.

Submitting Documents to National MI

Encompass® User Guide Delegated

Dated: June 2021

National Mortgage Insurance Corporation | 2100 Powell Street | 12TH Floor | Emeryville, CA 94608 | nationalmi.com

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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.

Branch Login Information		Loan Information	
Naster Policy Number:	99983-0001	CoBorrower:	John Homeowner Mary Homeowner
ranch ID:	ICE Mortgage Technology	Loan Number:	1610000051
Iranch Password:	•••••	Visit National MI.co	om - Rate, Guidelines, etc.
	Save Login Information	For assistance con or solutioncenter	ntact Solution Center at 855.317.4NMI @nationalmi.com
Inde Check Status /	View Results Document Uploa	ad History	(*) Req
Check Status / Request Type: No	New Results Document Uploa	ad History	(*) Req
Check Status / Request Type: No Mortgage Insurance Int	View Results) Document Uploa n-Delegated Application	ad History	(*) Requ
Check Status / Request Type: No Mortgage Insurance Int Premium Payment Type	View Results) Document Uploa n-Delegated Application formation BorrowerPaid	ad History) * Additional Loan I Special Program	(*) Requ formation
Request Type: No Mortgage Insurance Int Premium Payment Type Premium Payment Plan	Vew Results Document Uploa n-Delegated Application formation BorrowerPaid Monthly ADVANTAGE	Additional Loan la Additional Loan la Special Program Special Pricing ID	(*) Required formation
Check Status / Request Type: No Mortgage Insurance Inf Premium Payment Type Premium Payment Plan MI Coverage %	View Results Document Uploa n-Delegated Application formation BorrowerPaid Monthly ADVANTAGE 25	Additional Loan II Additional Loan II Special Program Special Pricing II	(*) Required formation
Check Status / Request Type: No Mortgage Insurance Int Premium Payment Type Premium Payment Plan MI Coverage % Refund Type	View Results Document Uploa n-Delegated Application formation BorrowerPaid Monthly ADVANTAGE 25 No Refund	Additional Loan I Additional Loan I Special Program Special Pricing IC Relocation Li	(*) Requ formation D

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



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> 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.

Attachment Name/Desc	Attachment Path
Comments	
I want to work on other loans while m	y documents are being uploaded Yes No Send
I want to work on other loans while m	ny documents are being uploaded Yes No Send
I want to work on other loans while m	ny documents are being uploaded Yes No Send
I want to work on other loans while m Attach	ny documents are being uploaded Yes No Send
I want to work on other loans while m Attach Select a browse location of the docu	ny documents are being uploaded Yes No Send
Attach Select a browse location of the docu Browse from Hard Drive Drowse from Ecompany a Sold	ny documents are being uploaded Yes No Send
I want to work on other loans while m Attach Select a browse location of the docu Browse from Hard Drive Browse from Encompass eFold	ry documents are being uploaded Yes No Send
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I want to work on other loans while m Attach Select a browse location of the docu Browse from Hard Drive Browse from Encompass eFold Contin	y documents are being uploaded Yes No Send
I want to work on other loans while m Attach Select a browse location of the docu Browse from <u>H</u> ard Drive Browse from <u>Encompass</u> eFold Contin	y documents are being uploaded Yes No Send
I want to work on other loans while m Attach Select a browse location of the docu Browse from <u>H</u> ard Drive Browse from <u>Encompass</u> eFold Contin	y documents are being uploaded Yes No Send
I want to work on other loans while m Attach Select a browse location of the docu Browse from Hard Drive Browse from Encompass eFold Contin	y documents are being uploaded Yes No Send



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Attachment Name/Desc	Attachment Path
Homeowner_1610000051_Test1003	\\nmi.local\files\NMIDocs\simon.attwood\Documents\Files from T
Homeowner_1610000051_Test1006VOD	\\nmi.local\files\NMIDocs\simon.attwood\Documents\Files from T
Homeowner_1610000051_TestVOE	\\nmi.local\files\NMIDocs\simon.attwood\Documents\Files from T
Comments	

- 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.

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Doc	cum	ents	Descent of Desc	Co. Domestica Dala	Chat in	D -1-	Devel
	Απ	Name	Requested From	For Borrower Pair	Status	Date	Requi
		1003 - URLA		John and Mary Homeow	Received	10/04/16	No
		1008 - Transmittal Summary					No
		Appraisal					No
	<u></u>	Credit Report		John and Mary Homeow	Received	10/04/16	No
	<u>~</u>	VOE		John and Mary Homeow	Received	10/04/16	No
		VOM					No
		Purchase Contract					No
	<u>~</u>	Mortgage Insurance	National MI	John and Mary Homeow	Received	10/04/16	
	2	Mortgage Insurance	National MI	John and Mary Homeow	Received	10/04/16	
	2	VOD		John and Mary Homeow	Received	10/04/16	
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Do	cum	ents				
	Att	Name	Requested From	For Borrower Pair	Status	Date
2	2	1003 - URLA		John and Mary Homeow	Received	10/04/16
		Credit Report		John and Mary Homeow	Received	10/04/16
וכ		Mortgage Insurance	National MI	John and Mary Homeow	Received	10/04/16
	2	Mortgage Insurance	National MI	John and Mary Homeow	Received	10/04/16
~	2	VOD		John and Mary Homeow	Received	10/04/16
2	<u>~</u>	VOE		John and Mary Homeow	Received	10/04/16
						<u> </u>
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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.

Attachment List						_
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Attachment Name/	Desc	Attachment Pa	ath			
Homeowner_1610	000051_Test1003	\\nmi.local\file	s\NMIDocs\sim	on.attwood\C	ocuments\Fi	les from T
Homeowner_1610	000051_Test1006VOD	\\nmi.local\file	s\NMIDocs\sim	on.attwood\D	ocuments\Fi	les from T
Homeowner_1610	000051_Test∀OE	\\nmi.local\file	s\NMIDocs\sim	on. attwood\C	ocuments\Fi	iles from T
Comments	ther loans while my docume	nts are being upload	ed () Yes (D No	G V Send	Close
uccess		×				
File u Com Loan Borro Orde	ploaded successfully. pany Name: MI_NMI Number: 161000058 wer Name: John Hom r Number: 1000320108	_NonDel neowner }	G			
		ОК				

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.

Master Policy Number: Branch ID:	99983-0001 ICE Mortgage Technology	Loan Information Borrower: CoBorrower: Loan Number:	John Homeowner Mary Homeowner 1610000051
Order Check Status /	Save Login Information	For assistance cor or <u>solutioncenter</u>	Im - Frace, Subdelines, etc. Hact Solution Center at 855.317.4NMI @nationalmi.com (*) Required
Document Upload History Date Sent	Comment	D	ocument Name(s)

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