

Ellie Mae Total Quality Loan® (TQL®) Program

Arch MI Encompass Integration



Encompass® MI Service includes an enhanced integration with Arch MI for a more streamlined mortgage insurance ordering process. This integration provides Encompass customers process improvements, automated ordering and access to data and alerts.

Settings and Configuration

If your organization has not been set up to place orders to Arch MI, please contact your Encompass account representative for details about getting set up and activated. You must be able to place orders to Arch MI to use the enhanced MI workflow using the TQL Services tool with Arch MI.

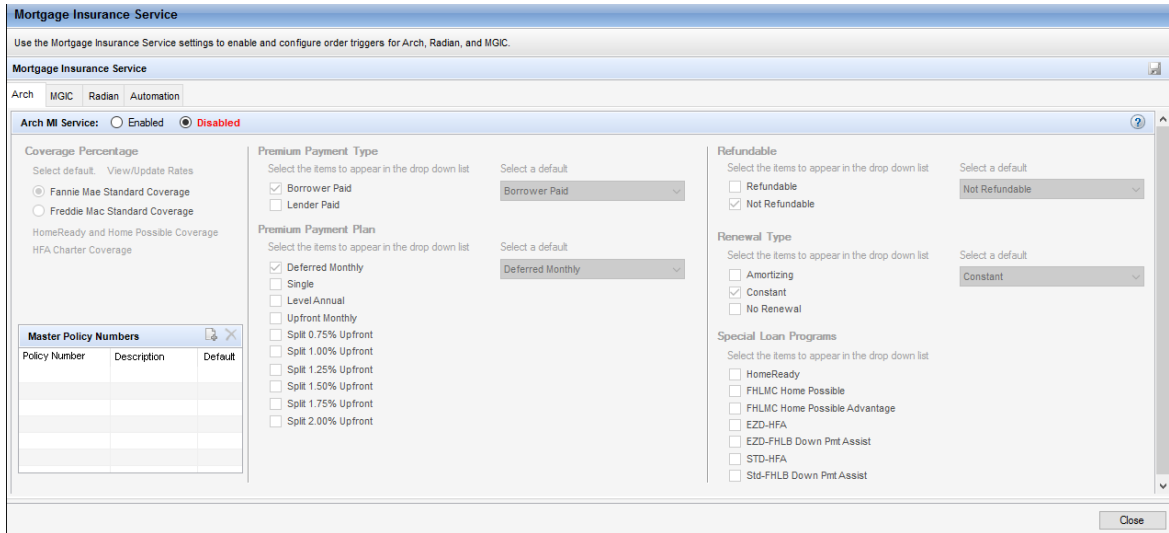
Authorized users, such as Encompass administrators, must first use the new **Mortgage Insurance Service** setting in Encompass Settings to enable and configure the type of orders being placed by their organization. The Encompass administrator must also assign persona-level access to designated users for loan submissions.

NOTE: *This integration is supported in Encompass 18.3 and later versions.*

Users with access to the Mortgage Insurance Service setting can view it out of the box, but the service is initially disabled. Authorized users need first to enable and then update the settings based on their organization's business needs.

To Enable and Configure Arch Mortgage Insurance Service:

- 1) On the menu bar, click **Encompass**, and then click **Settings**.
- 2) On the left panel, click **Additional Services** and then click **Mortgage Insurance Service**.
 - The *Arch* tab displays by default when you access the *Mortgage Insurance Service* setting.



Mortgage Insurance Service

Use the Mortgage Insurance Service settings to enable and configure order triggers for Arch, Radian, and MGIC.

Mortgage Insurance Service

Arch MGIC Radian Automation

Arch MI Service: ☐ Enabled ☒ Disabled

Coverage Percentage
Select default. View/Update Rates
☒ Fannie Mae Standard Coverage
☐ Freddie Mac Standard Coverage
HomeReady and Home Possible Coverage
HFA Charter Coverage

Premium Payment Type
Select the items to appear in the drop down list
☒ Borrower Paid
☐ Lender Paid
Select a default: Borrower Paid

Premium Payment Plan
Select the items to appear in the drop down list
☒ Deferred Monthly
☐ Single
☐ Level Annual
☐ Upfront Monthly
☐ Split 0.75% Upfront
☐ Split 1.00% Upfront
☐ Split 1.25% Upfront
☐ Split 1.50% Upfront
☐ Split 1.75% Upfront
☐ Split 2.00% Upfront
Select a default: Deferred Monthly

Refundable
Select the items to appear in the drop down list
☐ Refundable
☒ Not Refundable
Select a default: Not Refundable

Renewal Type
Select the items to appear in the drop down list
☐ Amortizing
☒ Constant
☐ No Renewal
Select a default: Constant

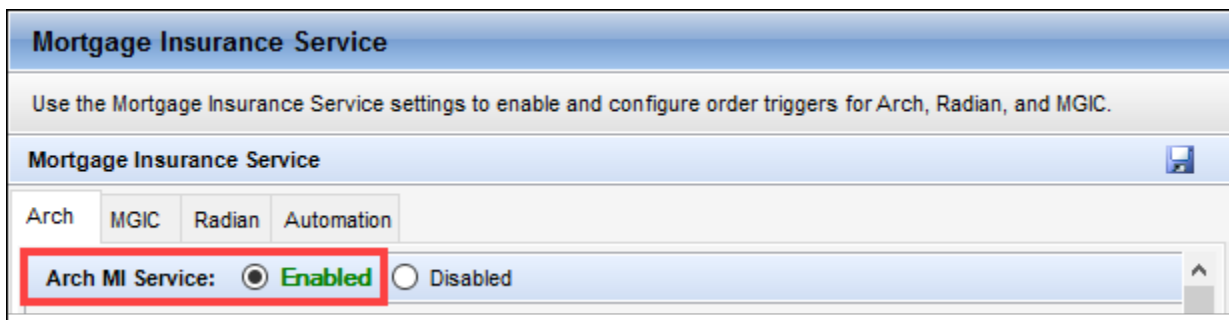
Special Loan Programs
Select the items to appear in the drop down list
☐ HomeReady
☐ FHLMC Home Possible
☐ FHLMC Home Possible Advantage
☐ EZD-HFA
☐ EZD-FHFB Down Pmt Assist
☐ STD-HFA
☐ STD-FHFB Down Pmt Assist

Master Policy Numbers

Policy Number	Description	Default

Close

3) In the *Arch MI Service* section, select the **Enabled** option.



Mortgage Insurance Service

Use the Mortgage Insurance Service settings to enable and configure order triggers for Arch, Radian, and MGIC.

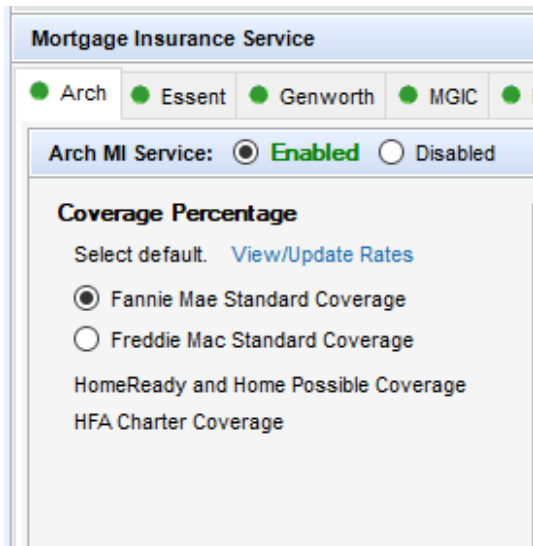
Mortgage Insurance Service

Arch MGIC Radian Automation

Arch MI Service: ☒ **Enabled** ☐ Disabled

4) Use the *Coverage Percentage* panel to configure a GSE default grid for populating the coverage percentage on a loan. The out-of-the-box values are available and you can update these based on any updates published by Arch MI. The values defined here will be the initial coverage percentage populated on the loan. Users have the ability to update the coverage percentage for their loan scenario, which then becomes the new default value for future orders.

- To configure this setting, select **Fannie Mae Standard Coverage** or **Freddie Mac Standard Coverage**.



Mortgage Insurance Service

● Arch ● Essent ● Genworth ● MGIC ●

Arch MI Service: ☒ **Enabled** ☐ Disabled

Coverage Percentage

Select default. [View/Update Rates](#)

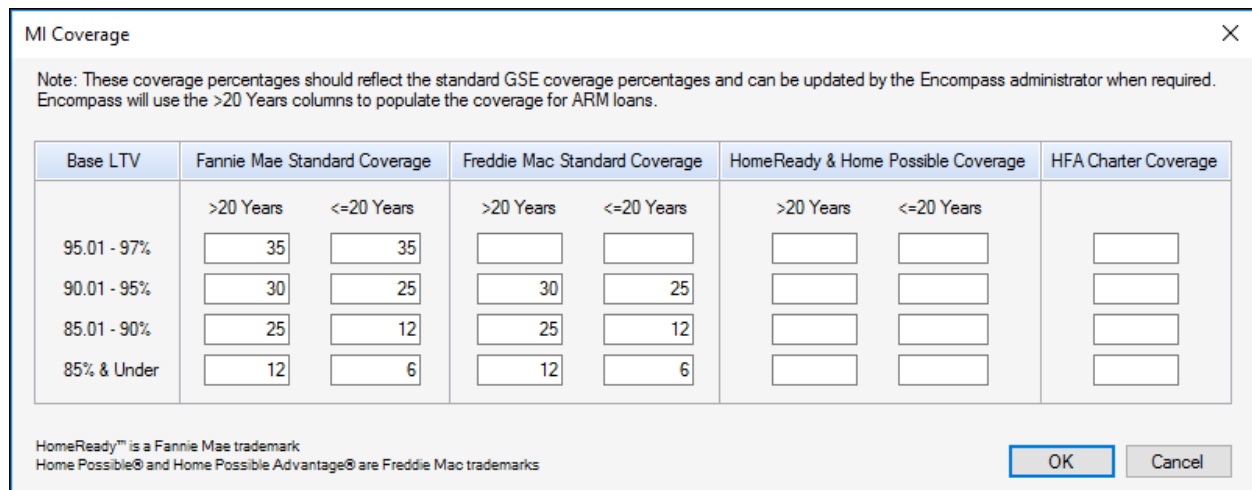
☒ Fannie Mae Standard Coverage

☐ Freddie Mac Standard Coverage

HomeReady and Home Possible Coverage

HFA Charter Coverage

- Click the **View/Update Rates** link to open the *MI Coverage* window and view/update the MI coverage rates on your loans.



MI Coverage

Note: These coverage percentages should reflect the standard GSE coverage percentages and can be updated by the Encompass administrator when required. Encompass will use the >20 Years columns to populate the coverage for ARM loans.

Base LTV	Fannie Mae Standard Coverage		Freddie Mac Standard Coverage		HomeReady & Home Possible Coverage		HFA Charter Coverage
	>20 Years	<=20 Years	>20 Years	<=20 Years	>20 Years	<=20 Years	
95.01 - 97%	<input type="text" value="35"/>	<input type="text" value="35"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
90.01 - 95%	<input type="text" value="30"/>	<input type="text" value="25"/>	<input type="text" value="30"/>	<input type="text" value="25"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
85.01 - 90%	<input type="text" value="25"/>	<input type="text" value="12"/>	<input type="text" value="25"/>	<input type="text" value="12"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
85% & Under	<input type="text" value="12"/>	<input type="text" value="6"/>	<input type="text" value="12"/>	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

HomeReady™ is a Fannie Mae trademark
Home Possible® and Home Possible Advantage® are Freddie Mac trademarks

- Click **OK** to return to the *Mortgage Insurance Service* panel.

- Use the *Master Policy Numbers* panel to enter your company's Arch MI Master Policy number so that all your Arch MI users can submit their loans without having to use their login credentials. The Master Policy number is used to identify each organization; therefore, login credentials are not issued or required for this service.

Master Policy Numbers		
Policy Number	Description	Default

- To add your Master Policy Number, click the **New** icon, type your Master Policy Number and a brief description.

Add Master Policy Number

Policy Number

Description

Main Master Policy

☒ Order Screen Default

OK

Cancel

- Select the **Order Screen Default** check box if you want this policy number to be the default value on the Arch MI Order window. If your organization has multiple policy numbers, the default value will display initially, and users can select the drop-down field to update to any of the additional policy numbers that have been added in this setting
- Click **OK** to return to the *Mortgage Insurance Service* window. Note that the *Master Policy Numbers* panel is updated with the values you entered.

Master Policy Numbers		
Policy Number	Description	Default
	Main Policy	<input checked="" type="checkbox"/>

- Use this section to configure/manage eligible orders for your organization and designating the default value displayed to your users when they initially access the MI order window on a loan.
 - If you select only one value, this will display as a static field in the order window.
 - If you select multiple values, this field will display as a drop-down and users can choose values based on your selections in this panel.

- Use the *Select a default* column to identify the default display on the order window.
- If a user updates this information on the order screen UI prior to placing an order on a loan, the updated values will serve as the “default” on that loan for future orders.

Premium Payment Type Select the items to appear in the drop down list Select a default <input checked="" type="checkbox"/> Borrower Paid Borrower Paid <input type="checkbox"/> Lender Paid	Refundable Select the items to appear in the drop down list Select a default <input checked="" type="checkbox"/> Refundable Not Refundable <input checked="" type="checkbox"/> Not Refundable
Premium Payment Plan Select the items to appear in the drop down list Select a default <input checked="" type="checkbox"/> Deferred Monthly Deferred Monthly <input checked="" type="checkbox"/> Single <input checked="" type="checkbox"/> Level Annual <input checked="" type="checkbox"/> Upfront Monthly <input checked="" type="checkbox"/> Split 0.75% Upfront <input checked="" type="checkbox"/> Split 1.00% Upfront <input checked="" type="checkbox"/> Split 1.25% Upfront <input checked="" type="checkbox"/> Split 1.50% Upfront <input checked="" type="checkbox"/> Split 1.75% Upfront <input checked="" type="checkbox"/> Split 2.00% Upfront	Renewal Type Select the items to appear in the drop down list Select a default <input checked="" type="checkbox"/> Amortizing Constant <input checked="" type="checkbox"/> Constant <input checked="" type="checkbox"/> No Renewal
Special Loan Programs Select the items to appear in the drop down list <input checked="" type="checkbox"/> HomeReady <input type="checkbox"/> FHLMC Home Possible <input type="checkbox"/> FHLMC Home Possible Advantage <input type="checkbox"/> EZD-HFA <input type="checkbox"/> EZD-FHLB Down Pmt Assist <input type="checkbox"/> STD-HFA <input type="checkbox"/> Std-FHLB Down Pmt Assist	

- 7) Use the *Personas* panel to designate the personas eligible for specific MI order request type(s). Use the drop-down lists in the *Default* column for each persona to designate the default value that will display in the order window when a user assigned to the persona submits their loan.

Personas (246)					
Persona	<input checked="" type="checkbox"/> Rate Quote	<input checked="" type="checkbox"/> Delegated	<input checked="" type="checkbox"/> Non-Delegated	<input checked="" type="checkbox"/> Contract UWV	Default
Account Executive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rate Quote

- 8) Click the **Save** icon.

NOTE: For setup and configuration information on Automated Orders with Arch MI, see [Encompass Mortgage Insurance Service: Automatic Ordering and Allocation](#).

Rate Quote Comparison and MI Orders from the TQL Services Tool

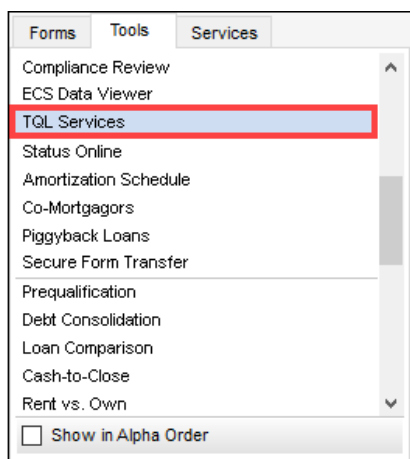
Once the *Mortgage Insurance Service* setting is configured by the Encompass administrator, authorized users can manually place MI orders using the *Mortgage Insurance Service Orders* panel in the TQL Services tool.

If you have multiple MI service providers configured with TQL Services, starting with the TQL Services 19.3 Major Release, you can request a rate quote comparison at any time in the loan lifecycle and compare MI rates until a certificate order type is placed on the loan.

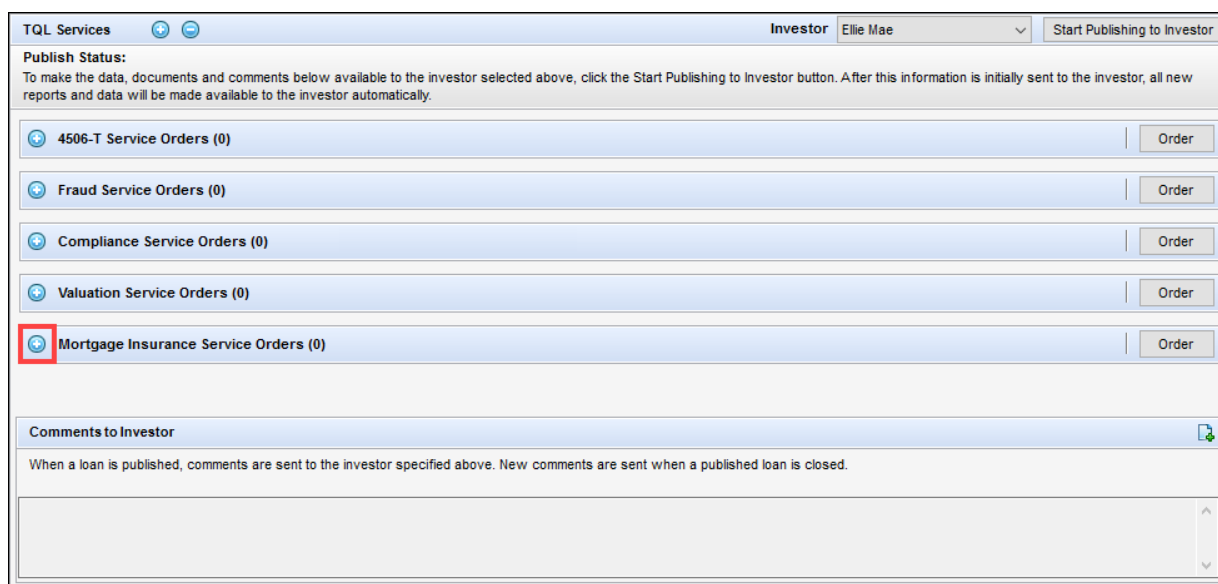
Important —You must have the **same defaults** selected for each active provider in the *Mortgage Insurance Service* settings to ensure an “apples to apples” comparison.

To Compare Rate Quotes:

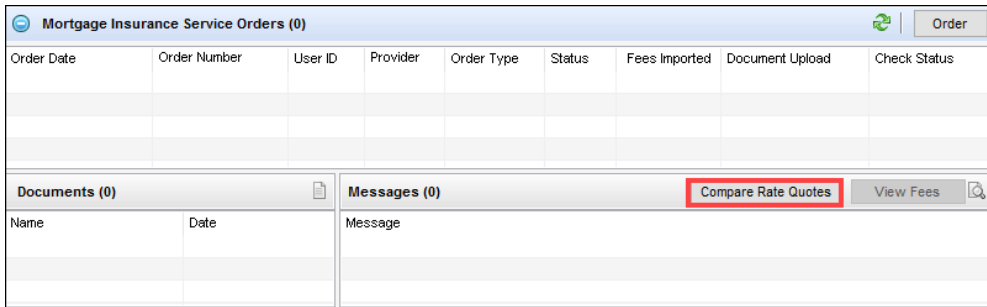
- 1) Open your loan and from the **Tools** tab, click **TQL Services**.



- 2) Click the + sign next to the *Mortgage Insurance Service Orders* heading to expand and view the panel.



3) Click the **Compare Rate Quotes** button.



Order Date	Order Number	User ID	Provider	Order Type	Status	Fees Imported	Document Upload	Check Status

Documents (0)

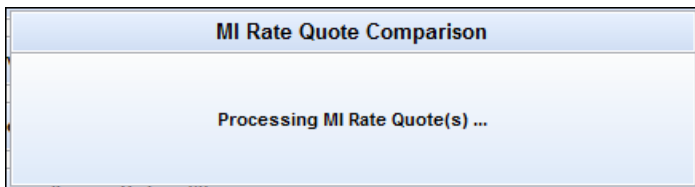
Messages (0)

Compare Rate Quotes

View Fees

Name	Date	Message

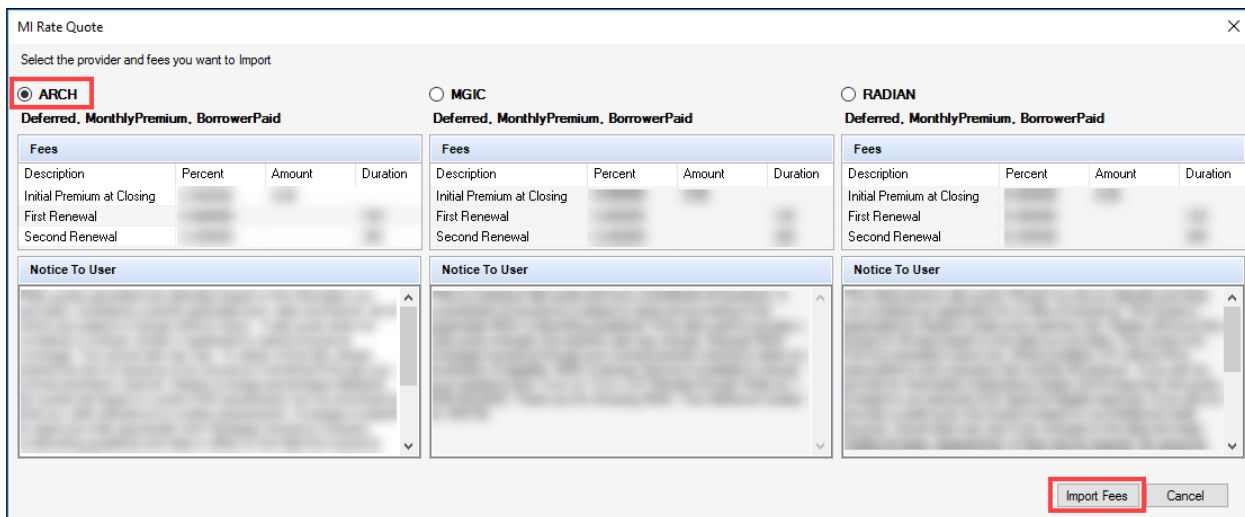
This will open an *MI Rate Quote Comparison* window displaying the processing status of the request.



MI Rate Quote Comparison

Processing MI Rate Quote(s) ...

4) In the *MI Rate Quote* window, compare the rate quotes, select your provider and then click the **Import Fees** button.



MI Rate Quote

Select the provider and fees you want to Import

☒ **ARCH**
☐ **MGIC**
☐ **RADIAN**

Deferred, MonthlyPremium, BorrowerPaid

Fees

Description	Percent	Amount	Duration
Initial Premium at Closing			
First Renewal			
Second Renewal			

Notice To User

NOTE: The *MI Rate Quote* window (above) has been modified for the purpose of this document to remove vendor-specific rates. Your *MI Rate Quote* window will display rate quotes for the enabled vendor(s). The *Fees* panel will display the rate quote received from the vendor.

- 5) You will be navigated back to the TQL Services tool where the *Mortgage Insurance Service Orders* panel updates with the rate quotes received from the enabled MI providers.

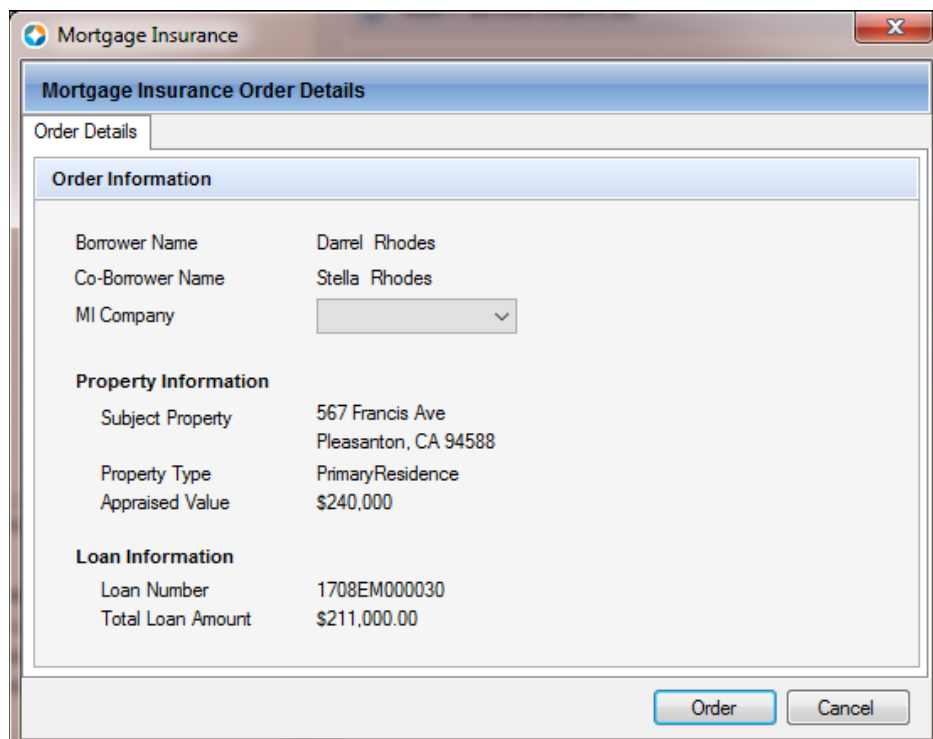
Mortgage Insurance Service Orders (3)								
Order Date ▼	Order Number	User ID	Provider	Order Type	Status	Fees Imported	Document Upload	Check Status
7/9/2019 4:25 PM	CIGNITH	admin	RADIAN	Rate Quote	Eligible			
7/9/2019 4:25 PM	4CPLFCV	admin	MGIC	Rate Quote	Eligible			
7/9/2019 4:25 PM	M28273064SB8D9	admin	ARCH	Rate Quote	Approved	✓		

Documents (1)		Messages (1)	
Name	Date ▼	Message ▲	
MIArch.RateQuote	7/9/2019 4:25 PM	Rate quotes generated are estimates based on the information you provided, considering currently applicable laws, rates and factors, al	

The **Compare Rate Quotes** button will continue to display in active/enabled mode since you have not yet placed an MI order. Once you place an MI order (any order type other than Rate Quote), the **Compare Rate Quotes** button will be deactivated but continue to display.

Order Mortgage Insurance:

- 1) Open your loan file and from the **Tools** menu, click **TQL Services**.
- 2) Go to the *Mortgage Insurance Service Orders* panel and click the **Order** button.
- 3) In the *Mortgage Insurance* window:
 - From the **MI Company** drop-down list, select **Arch**.



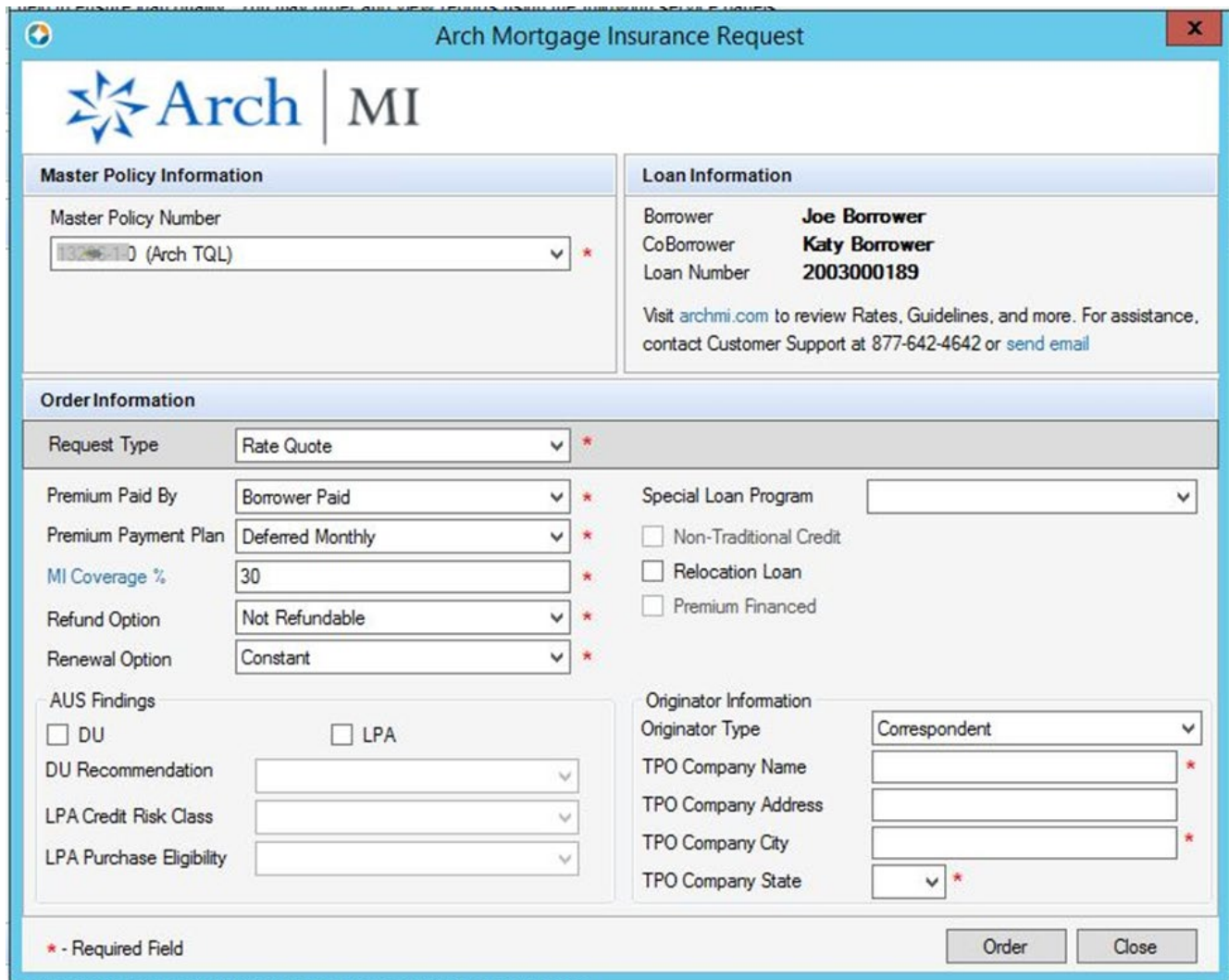
The screenshot shows the 'Mortgage Insurance Order Details' window. It contains the following information:

- Order Information:**
 - Borrower Name: Darrel Rhodes
 - Co-Borrower Name: Stella Rhodes
 - MI Company: (dropdown menu)
- Property Information:**
 - Subject Property: 567 Francis Ave, Pleasanton, CA 94588
 - Property Type: PrimaryResidence
 - Appraised Value: \$240,000
- Loan Information:**
 - Loan Number: 1708EM000030
 - Total Loan Amount: \$211,000.00

At the bottom right, there are 'Order' and 'Cancel' buttons.

- Click the **Order** button.

4) In the Arch Mortgage Insurance Request window:



The screenshot shows the 'Arch Mortgage Insurance Request' window. It contains the following sections:

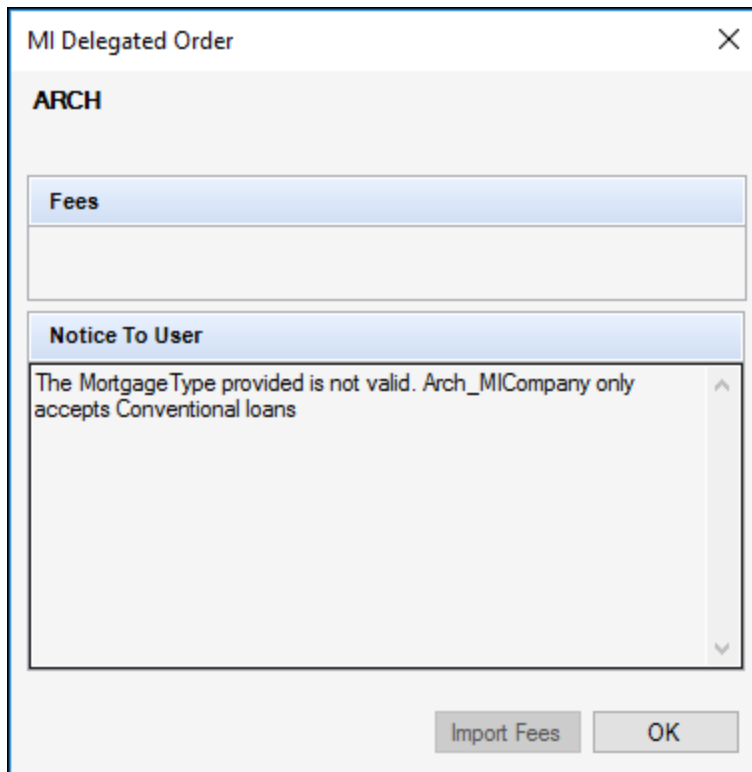
- Master Policy Information:** Master Policy Number (13200010 (Arch TQL) with a dropdown arrow and a red asterisk).
- Loan Information:** Borrower (Joe Borrower), CoBorrower (Katy Borrower), Loan Number (2003000189). Below this is a link to visit archmi.com and contact Customer Support at 877-642-4642 or [send email](#).
- Order Information:**
 - Request Type: Rate Quote (dropdown arrow and red asterisk).
 - Premium Paid By: Borrower Paid (dropdown arrow and red asterisk).
 - Premium Payment Plan: Deferred Monthly (dropdown arrow and red asterisk).
 - MI Coverage %: 30 (text input and red asterisk).
 - Refund Option: Not Refundable (dropdown arrow and red asterisk).
 - Renewal Option: Constant (dropdown arrow and red asterisk).
 - AUS Findings:
 - ☐ DU ☐ LPA
 - DU Recommendation (dropdown arrow)
 - LPA Credit Risk Class (dropdown arrow)
 - LPA Purchase Eligibility (dropdown arrow)
 - Special Loan Program (dropdown arrow).
 - Non-Traditional Credit (checkbox).
 - Relocation Loan (checkbox).
 - Premium Financed (checkbox).
 - Originator Information:
 - Originator Type: Correspondent (dropdown arrow).
 - TPO Company Name (text input and red asterisk).
 - TPO Company Address (text input).
 - TPO Company City (text input and red asterisk).
 - TPO Company State (dropdown arrow and red asterisk).

At the bottom left, there is a legend: * - Required Field. At the bottom right, there are 'Order' and 'Close' buttons.

5) Review and make the appropriate updates to the values displayed in the drop-down fields for **Master Policy Number**, **Request Type**, **Premium Paid By**, **Refund Option** and **Renewal Option**. When applicable, update the drop-down fields for **LP Purchase Eligibility**, **LP Credit Risk Class** and **DU Recommendation**. For your first order, all these fields will display the default value configured by your Encompass administrator. The drop-down fields will only display values that have been configured by the administrator. If your administrator has not configured multiple values to display, you will see a static field with only one option instead of a drop-down field with multiple options. Once your order is complete, the last selected value will display for any future requests.

- For the **Request Type** field, if you select **Delegated Application** or **Non-Delegated Application**, a **Rate Quote ID** drop-down field is displayed with all the rate quote reference numbers on the loan. You can select a value or leave this field blank.

- The **Non-Traditional Credit** checkbox is disabled. It is displayed as selected when all of the credit score fields for the borrowers on the loan are not present. In this case, the order is sent to Arch MI as a Non-Traditional Credit order request. If any of the borrowers have a credit score, the **Non-Traditional Credit** check box is not selected.
- Click the **Order** button.
- If your loan is missing information or includes data that is not supported by Arch MI, an error message will display explaining the issue. You can return to your loan file to update the information, save the loan and then place your order.



The screenshot shows a window titled "MI Delegated Order" with a close button (X) in the top right corner. The window contains the following elements:

- A header section labeled "ARCH".
- A section labeled "Fees" with a table below it that is currently empty.
- A section labeled "Notice To User" containing a text area with the message: "The MortgageType provided is not valid. Arch_MICompany only accepts Conventional loans".
- At the bottom, there are two buttons: "Import Fees" and "OK".

- With each loan submission to Arch MI (successful or unsuccessful), once you submit your loan file, you are automatically directed to the TQL Services tool, where the *Mortgage Insurance Service Orders* panel updates with the details of your order. Note that the **Compare Rate Quotes** button is now deactivated.

Mortgage Insurance Service Orders (14)										Order
Order Date ▾	Order Number	User ID	Provider	Order Type	Status	Fees Imported	Document Upload	Check Status		
4/20/2018 4:36 PM	56420997	admin	ARCH	Delegated	Approved		Manage Documents	Check Status		
4/20/2018 3:34 PM	56420997	admin	ARCH	Delegated	Approved					
4/20/2018 3:32 PM	56420997	admin	ARCH	Delegated	Approved					
Documents (1)			Messages (1)			Compare Rate Quotes			Import Fees	
Name		Date ▾		Message ▴						
Mortgage Insurance		5/3/2018 4:41 PM		This is a premium rate quote and not a commitment of insurance. A commitment of insurance is subject to approval according to the applicable MGIC underwriting guide!						

For more information on the updated panel, go to the [Mortgage Insurance Service Orders](#) section.

Mortgage Insurance Service Orders

Once your loan is submitted to Arch MI, the *Mortgage Insurance Service Orders* panel in the TQL Services tool updates with the order details.

Mortgage Insurance Service Orders (4)

Order

Order Date	Order Number	User ID	Provider	Order Type	Status	Fees Imported	Document Upload	Check Status
4/15/2020 2:27 PM	45585617	admin	ARCH	Delegated	Approved	<div></div>	Manage Documents	Check Status
4/15/2020 2:25 PM	45585617	admin	ARCH	Delegated	Suspended			
4/15/2020 2:24 PM	M44406208S0253E	admin	ARCH	Rate Quote	Approved			
4/15/2020 2:23 PM	M44406208S0252F	admin	ARCH	Rate Quote	Approved			

Documents (1)

Name	Date
MIArch.Delegated	4/15/2020 2:27 PM

Messages (1)

Compare Rate Quotes

View Fees

Message

We're pleased to inform you that your loan has been approved for Mortgage Insurance. Thank you for choosing Arch MI. See Arch MI's frau

To View Order Details:

- In the *Mortgage Insurance Service Orders* panel, click to select an order.
- The *Messages* panel displays the messages returned to Encompass by Arch MI.
- The *Document Upload* column updates with a **Manage Documents** link for Delegated, Non-Delegated and Contract UW orders. Click this link to upload and send additional documents to Arch MI. For more information, see [Manage and Upload Documents to Send to Arch MI](#).
- If there are imported fees with any orders, the *Fees Imported* column displays a green check mark. There will only be one order in the order history that displays a green check mark in the *Fees Imported* column. For more information on the fields that are updated in the loan file when fees are imported from an order, see [Loan Data Updates](#).
- In the *Documents* panel, click the **Document** icon to view the document, returned from the order, in the eFolder.

Manage and Upload Documents to Send to Arch MI

The *Manage Documents* link in the *TQL Services tool > Mortgage Insurance Service Orders* panel displays for certificate order types only. Use this link to upload and send documents from your eFolder or hard drive to Arch MI.

To Send Documents to Arch MI:

- 1) From the loan file, go to the *TQL Services tool > Mortgage Insurance Service Orders* panel.
- 2) Locate the certificate order for which you want to add documents and click the **Manage Documents** link.

Mortgage Insurance Service Orders (4)								
Order Date ▼	Order Number	User ID	Provider	Order Type	Status	Fees Imported	Document Upload	Check Status
4/15/2020 2:27 PM	45585617	admin	ARCH	Delegated	Approved	✓	Manage Documents	Check Status
4/15/2020 2:25 PM	45585617	admin	ARCH	Delegated	Suspended			
4/15/2020 2:24 PM	M44406208S0253E	admin	ARCH	Rate Quote	Approved			
4/15/2020 2:23 PM	M44406206S0252F	admin	ARCH	Rate Quote	Approved			

Documents (1)		Messages (1)
Name	Date ▼	Message ▲
MiArch.Delegated	4/15/2020 2:27 PM	We're pleased to inform you that your loan has been approved for Mortgage Insurance. Thank you for choosing Arch MI. See Arch MI's frau

- 3) In the *Upload Documents* window, select the **Post Close Documents** check box, if you want to upload documents for closed loans.

If you are not uploading post-close documents, skip to [step 5](#) below.

NOTE: The **Post Close Documents** check box is available with the *TQL Services 19.3 Major Release*.

Upload Documents

Select a browse location of the document you wish to attach

☒ Encompass eFolder
☐ Hard Drive

Name	Path	Type	Size (KB)	Document Type

Enter your comments here

☐ Post Close Documents ? Upload

Sent Date	Comment	Document Name(s)

Close

4) In the *File Upload* window, click the **Yes** button.

Upload Documents

Select a browse location of the document you wish to attach

☒ Encompass eFolder
☐ Hard Drive

Name	Path	Type	Size (KB)	Document Type

Enter your comments here

☒ Post Close Documents ? Upload

Sent Date	Comment	Document Name(s)

Close

File Upload

? Is this a closed loan? Upload of Post Close Documents is only permitted for closed loans.

Yes No

5) Back in the *Upload Documents* window, select **Hard Drive** (for the purpose of this exercise) and then click the + icon.

Upload Documents

Select a browse location of the document you wish to attach

☐ Encompass eFolder

☒ **Hard Drive**

Documents to Upload				
Name	Path	Type	Size (KB)	Document Type

Enter your comments here

☒ Post Close Documents ? Upload

Document Upload History		
Sent Date	Comment	Document Name(s)

Close

6) Select the document from your computer and then click the **Open** button

Open

← → ↑ This PC > Desktop > Search Desktop

Organize New folder

This PC


- Desktop
- Documents
- Downloads
- Music
- Pictures
- Videos
- Local Disk (C:)

Name	Date modified	Type	Size
WFH	2/14/2018 10:04 AM	File folder	
2018 Holiday Schedule.pdf	7/23/2018 4:27 PM	Adobe Acrobat D...	8...
2018-Product-Organization-Kick...	1/29/2018 12:39 PM	Adobe Acrobat D...	6...
asdf.pdf	11/5/2015 1:41 PM	Adobe Acrobat D...	2...
...

File name: asdf.pdf

Open Cancel

7) In the *Upload Documents* window, select an appropriate value from the **Document Type** drop-down list.


Upload Documents

Select a browse location of the document you wish to attach

☐ Encompass eFolder
☒ Hard Drive

Documents to Upload

Name	Path	Type	Size (KB)	Document Type
asdf.pdf	C:\Users\...\Desktop\asdf.pdf	pdf	24.95	Insurance

Enter your comments here

☒ Post Close Document

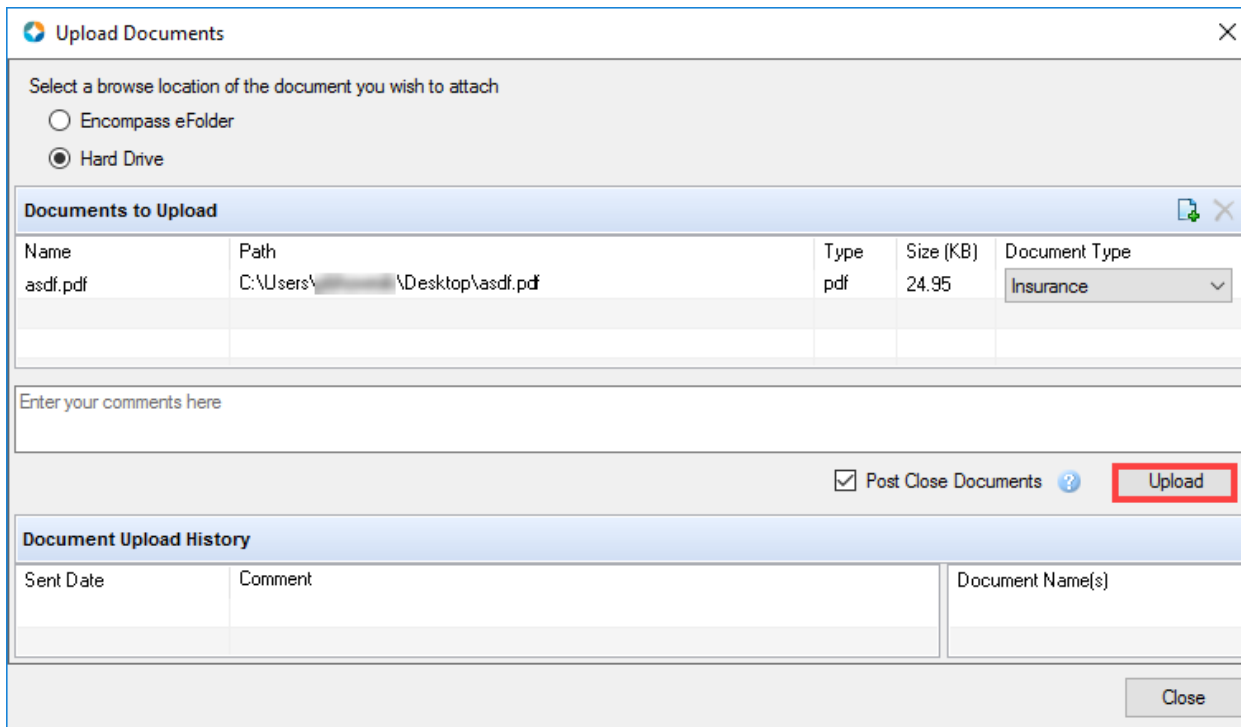
Document Upload History

Sent Date	Comment	Document

Legal
Lender Approval-Notes
Loan Modification Request
Misc Loan Docs
Purchase Contract
Title Reports-Closing Docs
Underwriter Notes-Worksheet
UW Decision-Findings

Close

8) Click the **Upload** button.



Select a browse location of the document you wish to attach

☐ Encompass eFolder

☒ Hard Drive

Name	Path	Type	Size (KB)	Document Type
asdf.pdf	C:\Users\...\Desktop\asdf.pdf	pdf	24.95	Insurance

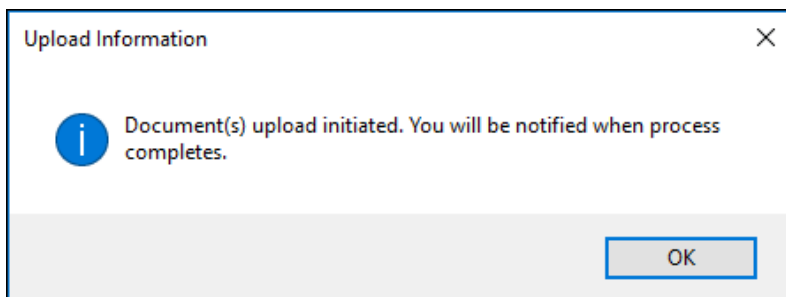
Enter your comments here

☒ Post Close Documents ? **Upload**

Document Upload History		
Sent Date	Comment	Document Name(s)

Close

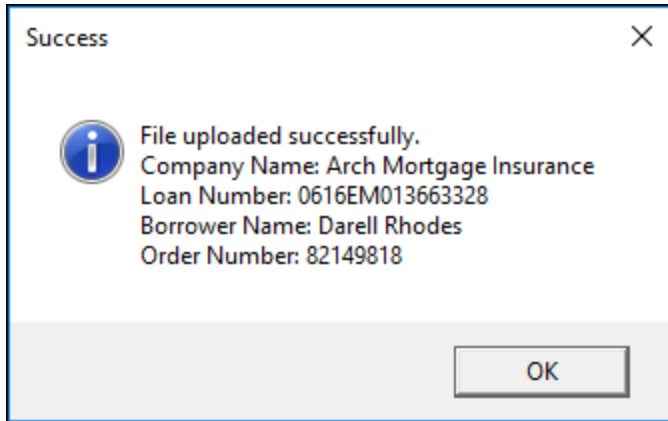
9) Click **OK** in the document upload status and confirmation windows.



Upload Information

i Document(s) upload initiated. You will be notified when process completes.

OK



- 10) In the *Upload Documents* window, verify that the *Document Upload History* panel is updated with your uploaded document and then click the **Close** button.

The "Upload Documents" window has a title bar with a close button (X). Inside, there's a section for selecting a browse location with two radio buttons: "Encompass eFolder" and "Hard Drive" (which is selected). Below this is a "Documents to Upload" table with columns: Name, Path, Type, Size (KB), and Document Type. The table is currently empty. Below the table is a text input field labeled "Enter your comments here". To the right of the input field is a checkbox labeled "Post Close Documents" with a question mark icon, and an "Upload" button. At the bottom is a "Document Upload History" table with columns: Sent Date, Comment, and Document Name(s). The first row of this table is highlighted with a red border and contains the following data:

Sent Date	Comment	Document Name(s)
7/10/2019 12:53 PM		asdf.pdf

At the bottom right of the window is a "Close" button, also highlighted with a red border.

Check Status on an Order

Use the order's **Check Status** link to view its status.

Mortgage Insurance Service Orders (4)								
Order Date	Order Number	User ID	Provider	Order Type	Status	Fees Imported	Document Upload	Check Status
4/15/2020 2:27 PM	45585617	admin	ARCH	Delegated	Approved	✓	Manage Documents	Check Status
4/15/2020 2:25 PM	45585617	admin	ARCH	Delegated	Suspended			
4/15/2020 2:24 PM	M44406208S0253E	admin	ARCH	Rate Quote	Approved			
4/15/2020 2:23 PM	M44406206S0252F	admin	ARCH	Rate Quote	Approved			

Documents (1)		Messages (1)
Name	Date	Message
MiArch.Delegated	4/15/2020 2:27 PM	We're pleased to inform you that your loan has been approved for Mortgage Insurance. Thank you for choosing Arch MI. See Arch MI's frau

Loan Data Updates

Once your order is returned from the MI vendor, the Encompass fields listed in the table below that are relevant to your loan data and order will be updated.

Field ID	Field Name
430	MI Coverage
708	Mortgage Insurance Company Address
709	Mortgage Insurance Company City
710	Mortgage Insurance Company ZIP
1107	UFMP
1198	Months per adjustment
1199	Periodic Factor
1200	Months per adjustment for second MI payment
1201	Periodic Factor for second MI payment
1252	Mortgage Insurance Company State
1765	Expenses Calc MIP/PMI Lock
2308	MI Ordered Date
2309	MI Received Date
3248	Insurance Mortgage Declining Renewals
3533	Lender Paid Mortgage Insurance
CD1.X71	MIC #
L248	Mortgage Insurance Company Name
ULDD.FNM.430	PMI Coverage
ULDD.X134	MI Company Name Type
VEND.X167	File #
VEND.X177	Case #