

Encompass Administrators can set up MI Services in Encompass Partner Connect® (EPC) in one of two ways:

 Through the desktop version of Encompass[®] from Encompass Settings and Web Version Settings.

OR

2. By logging in directly into EPC.

Encompass View Pipeline Home Dineline Los Encompass Settings Pipel Encompass Settings Go to Recent Import Help Settings Overview Loan Settings Overview Company/User Setup Filter: Company Information The features and tools on the Company Settings and Personal Settings are used to define, configure, and manage Encompass - ICE Mortgage Technology Network 14 4 Encompass - Web Version Settings Services Password Management Alerts Personas Web Version Settings -... Organization/Users Version Settings 6 4 5 Roles Milestones Configuration Maintenance ... User Groups Improve Productivity & Enhance Control Build Environment 3 External Company Setup 4 Investor Connect Setup 3 Loan Setun Company/User Setup Loan Templates **Business Rules** System Administratio 3 eFolder Setup Company Information Loan Programs Loan Folder Business Rule Analysis Tools Current Logins ICE Mortgage Technology Network Com Closing Costs Milestone Completion 3 Docs Setup Services Password Management Input Form Sets Field Data Entry All User Information - Secondary Setup 4 Personas Settlement Service Providers Field Triggers Settings Reports - Contact Setup

	Encompass	ADMIN
ð	COMPANY/USER SETUP	>
۵	SERVICES	>
\$	OPPORTUNITIES SETUP	>
Î	WORKFLOW MANAGEMEN	AL Y
	ASSET MANAGEMENT	>
	CUSTOMIZATION	>

3. From the Admin screen, click the SERVICES menu.





4. Select Services Management from the drop-down list.

Encompass	ADMIN
COMPANY/USER SETUP	
<	
Services Management	
Vendor Allocation	
Data Permissions	
S OPPORTUNITIES SETUP	
	NT
ASSET MANAGEMENT	

5. Click the Add Service button (on the top right corner of the screen).

Services Management 8 Servic	es Configured	Automation Rules	Add Service Search
Advantage Credit, Inc. Credit	ARCH MI Rate Quote Comparison Mortgage Insurance	Arch Mortgage Insurance Mortgage Insurance	Corelogic Credco Credit
Service Setup :	Service Setup	Service Setup :	

Encompass Admin	N
COMPANY/USER SETUP	Services Management /
<	Add Service
Services Management	
Vendor Allocation	
Data Permissions	
S OPPORTUNITIES SETUP	Category
	Mortgage Insurance
	Retrieve Products

- 6. In the Category section, choose Mortgage Insurance and Retrieve Products.
- **7.** All available services will appear.

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8. Click the Manual link in the Arch MI service card for (Arch MI Rate Quote Comparison or Arch Mortgage Insurance).

Note: The **R2T** services are for testing purposes only and not required to be set up.

- 9. Click the Active button to enable Arch MI.
- **10.** Enter **Service Setup Name** as "Arch MI Mortgage Insurance" or "Arch MI Rate Quote Comparison," depending on which service is being set up.
- **11.** Click the **Add** button to add Organizations, Users, Personas.
- 12. Click the Save button.

Services Management / Add Service 24 Available Services	;		Search all Q (Sort v A-Z) Category v Mortgage Insurance
ARCH MI - R2T Mortgage Insurance	ARCH MI Rate Quote Comparison Mortgage Insurance	ARCH MI Rate Quote Comparison - R2T Mortgage Insurance	Arch Mortgage Insurance Mortgage Insurance
Manual Easy Order Automated	Manual Easy Order Automated	Manual Easy Order Automated	Manual Easy Order Automated

Services Management / Add Service /								
Add Manual Setup							Active	OFF
Service Type Mortgage Insurance	Evaluation Level Loan Level			Provider Arch Mortgage Insurance				
Service Setup Name		Se	ervice Setup Description					
L								
Readiness Conditions ©							Valio	late
Condition Editor Query Builder								
Authorized Users [®]						Add	Delete	Ţ,
D	NAME		ТҮРЕ		ACTION			
		No Results F	-ound.					
Total items: 0								
						Can	cel	Save

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13. From the Services

Management page, click the three dots next to the Service Setup option and choose **Credentials** from the drop-down menu.

14. Type in the Name, Description, Master Policy Number and Master Policy Number Description, then

click Save.

Automation Rules Add Service Services Management 8 Services Configured Sort V A-Z Category V All Advantage Credit, Inc. **ARCH MI Rate Quote Comparison** Arch Mortgage Insurance Corelogic Credco Credit Mortgage Insurance Mortgage Insurance Credit Note: Access settings added to this product apply only to manual orders placed using Encompass Web. Service Setup Service Setup Service Setup Service Setup - 1 Condition Mapping Credentials Document Mapping

Encompass Admin			0	2
COMPANY/USER SETUP	Services Management / Crodentials /			
<	Add Company Override Credentials			
Services Management	None Decelation			
Vendor Allocation	Company Name Description Default			
	Credentials Company Credentials Master Policy Number Description			
ASSET MANAGEMENT	12345-1-0 Demo Lender			
	Users	Add Dele	e :	1
	D ID NAME TYPE ACTION			
	No Results Found.			
 		Canc	el	Save



- **15.** EPC supports the ability to configure and label multiple Master Policy Numbers (MPNs).
- **16.** For lenders processing loans for multiple legal entities or purposely ordering with more than one MPN:
 - **a.** Enter Company Name and Description.
 - b. Enter each MPN followed by a comma and a space to separate the list, e.g., "12345-1-0, 12345-13-0."
 - c. In the Master Policy Number description field, enter a descriptive name of each MP, followed by a comma and space.
 - **d.** The position of the name should match the accompanying Master Policy number.

Services Management / Credentials / Add Company Override Cred	entials				
Name • Company Name Credentials	Desc	ription			
Company Credentials Master Policy Number • 12345-1-0, 12345-13-0, 12345-8-0, 12345-10-0	ArchM	Policy Number Description 11, ArchMI2, ArchMI3, ArchMI4			
Users [®]	NAME	Түре	٨	Add Delete	
		No Results Found.			
Total items: O					
				Cancel	Save



IMPORTANT: Multiple Master Policy Numbers cannot be configured for the Rate Quote Comparison service.

17. Master Policy Numbers that are configured will appear in a drop-down list in the New Order screen for the users to select.

Services Management / Credentials /				
Add Company Override Credentials				
Name • Company Name Credentials	Description Default			
Company Credentials				
Master Policy Number * 12345-1-0, 12345-13-0, 12345-8-0, 12345-10-0	Master Policy Number Description	n hMI4		
Users [®]				Add Delete
D ID N	AME	ТҮРЕ	ACTION	
	No Re	esults Found.		
Total items: 0				
				Cancel

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Admin Settings

Encompass Administrators can add/edit/remove settings options from the Arch MI: New Order screen.

- **1.** Select a loan from the pipeline.
- 2. Go to MI Center.
- 3. Click on New Order and select ARCH.

Encompass' | PIPELINE > LOAN === -TEST241100134 DAVE TESTQUOTE ~ ÷ 🔓 230 N Elm Greensboro NC, 27401 \$0.00 \$333,333.00 \$300,000.00 MM/DD/YYYY < --- 1 Mid-FICO 7.000% 🔒 Not Locked Conventional Fixed 19.959 / 19.959 90.000 / 90.000 / 90.000 Purchase Detached | Primary Estimated Value Note Rate Lock Status Fixed Rate Total Loan Amount DTI LTV/CLTV/HCLTV Est Closing Date Notifications **Application View** Forms **Borrower Information** Credit Information & Ordering Property, Title & Trust Documents Services i Loan Information **Rate & Registration Information Employment & Income** 8 All Services MI Center Assets, Gifts & Grants Liabilities Financial Information - Real Estate Underwriting Cente 📥 Tools Qualifying the Borrower Declarations Demographic Information

	Encompa	SS PIPELINE > LOAN								۹ 🏭	🖻 🕐 🖴
TES	T241100130	DAVE TCTWO 🧹 🔺							e .	• •	Save X
<	Mid-FICO	230 N ELM ST Greensboro NC, 27401 Detached I Primary	\$333,333.00 7.0 Appraised Value Not	00% Content of the second seco	Conventional Fixed Fixed Rate	\$333,333.00 Purchase Price	\$300,000.00 Total Loan Amount	25.511 / 25.511 DTI	90.000 / 90.000 / 90.00	D Purchase First	MM/DD/YYYY Est Closing Date
9	Mortga	ge Insurance Center: Or	der History 🗸						ARCH		New Order ~
	MI Orders								_	_	
G	Group By	None Order Order D	ate Order Type								
-	•	ORDER DATE OR	DER NUMBER	PROVIDER NAME	ORDER TYPE		ORDER REQUEST MET	THOD EXPIRA	ATION DATE S	TATUS	
	. 0	11/22/2024 11:39 AM 231	22962	Arch	Delegated		Manual	03/22/	2025 A	pproved	1

4. In the Arch MI: New Order Screen, click on the **Settings** option.

Mi Center /	
Arch MI: New Order (9)	SETTINGS
MASTER POLICY INFORMATION	
Master Policy Number •	
ORDER TYPE	
Request Type Rate Quote v	
Premium Payment Plan Premium Paid By Refund Option Deferred Monthly Borrower Paid	

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- **5.** Update any of the options that are applicable under the following categories:
 - Premium, Refund and Renewal Options.
 - Persona Ordering Permissions.
 - Coverage Percentage.

inin Settings						
emium, Refund and Renewal Options						
Premium Payment Plan			Split Premium			
elect the Items to appear In the list Deferred Monthly Single Upfront Monthly Split Premium Annual	Selected Def Deferred	aut Monthly V	Select the Items to appear in the list 0.75% 2.10% 1.25% 1.50% 1.75% 2.00%		Selected Default 1.00%	~]
Premium Paid By		Refund Option		Renewal Option		
elect the items to appear in the list Selected Der	fault Paid / ~	Select the Items to appear in the list Refundable Not Refundable	Selected Default Not Refundable	Select the items to appear in the list Constant Declining / Amortizing No Renewals	Selected Default Constant	~
Special Loan Program		Premium Financed				
elect the Items to appear In the list		Premium Financed				

6. Click Save.

These options will be saved as global settings for all orders.

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