

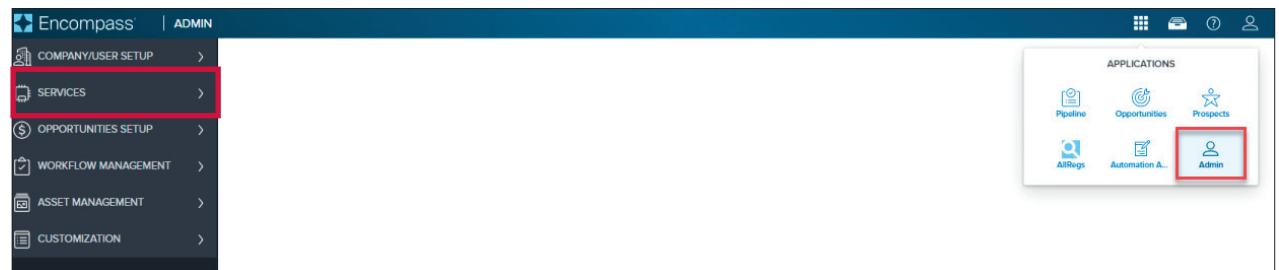
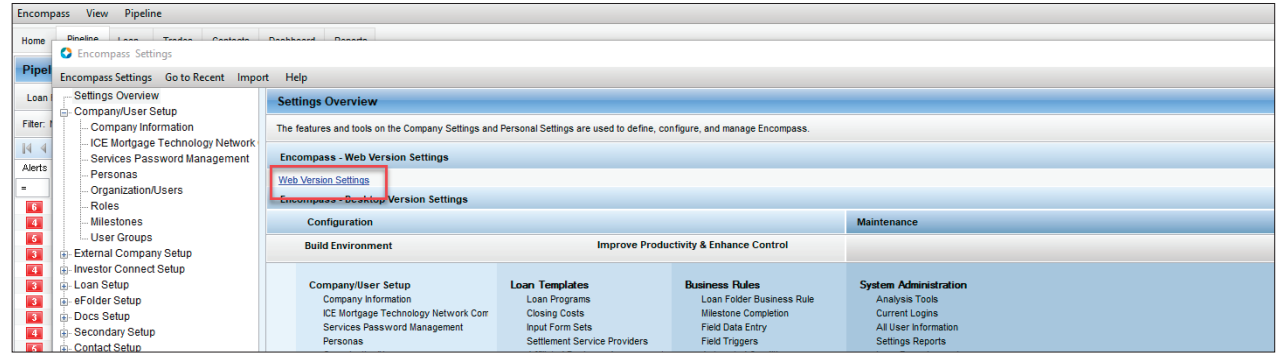
Encompass Administrators can set up MI Services in Encompass Partner Connect® (EPC) in one of two ways:

1. Through the desktop version of Encompass® from Encompass Settings and **Web Version Settings**.

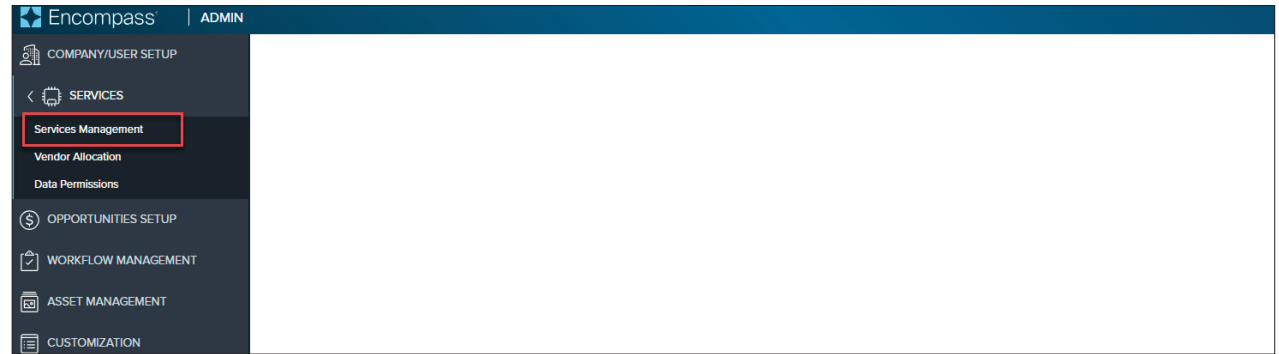
OR

2. By logging in directly into EPC.

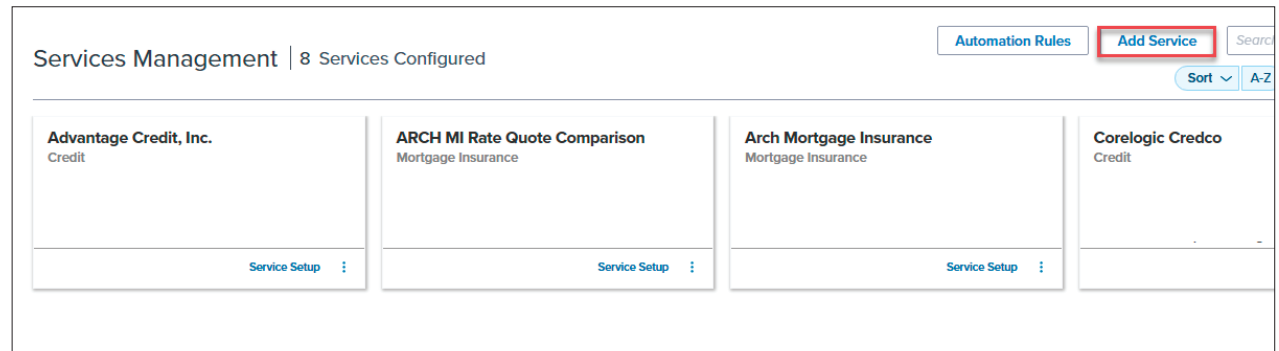
3. From the Admin screen, click the **SERVICES** menu.



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

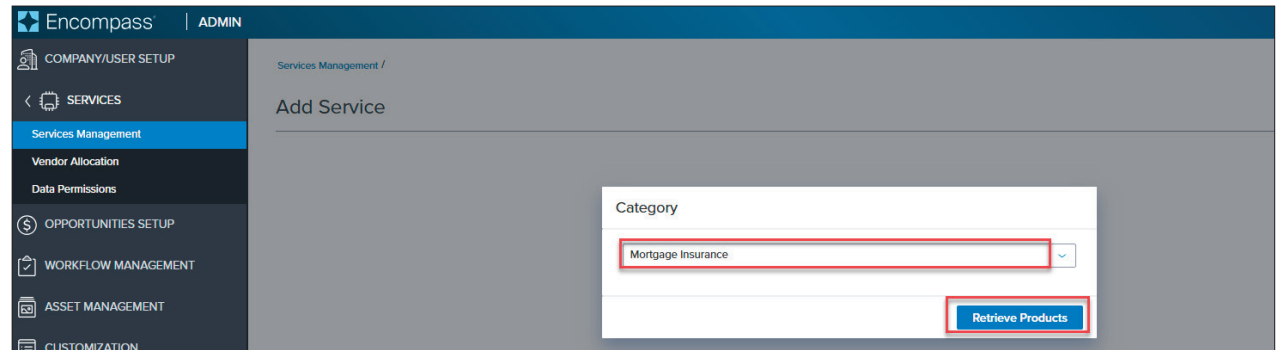


5. Click the **Add Service** button (on the top right corner of the screen).



6. In the Category section, choose **Mortgage Insurance** and **Retrieve Products**.

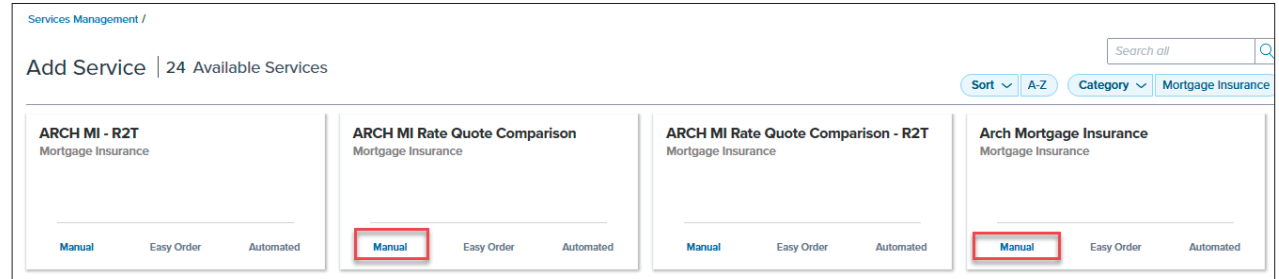
7. All available services will appear.



- 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.

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

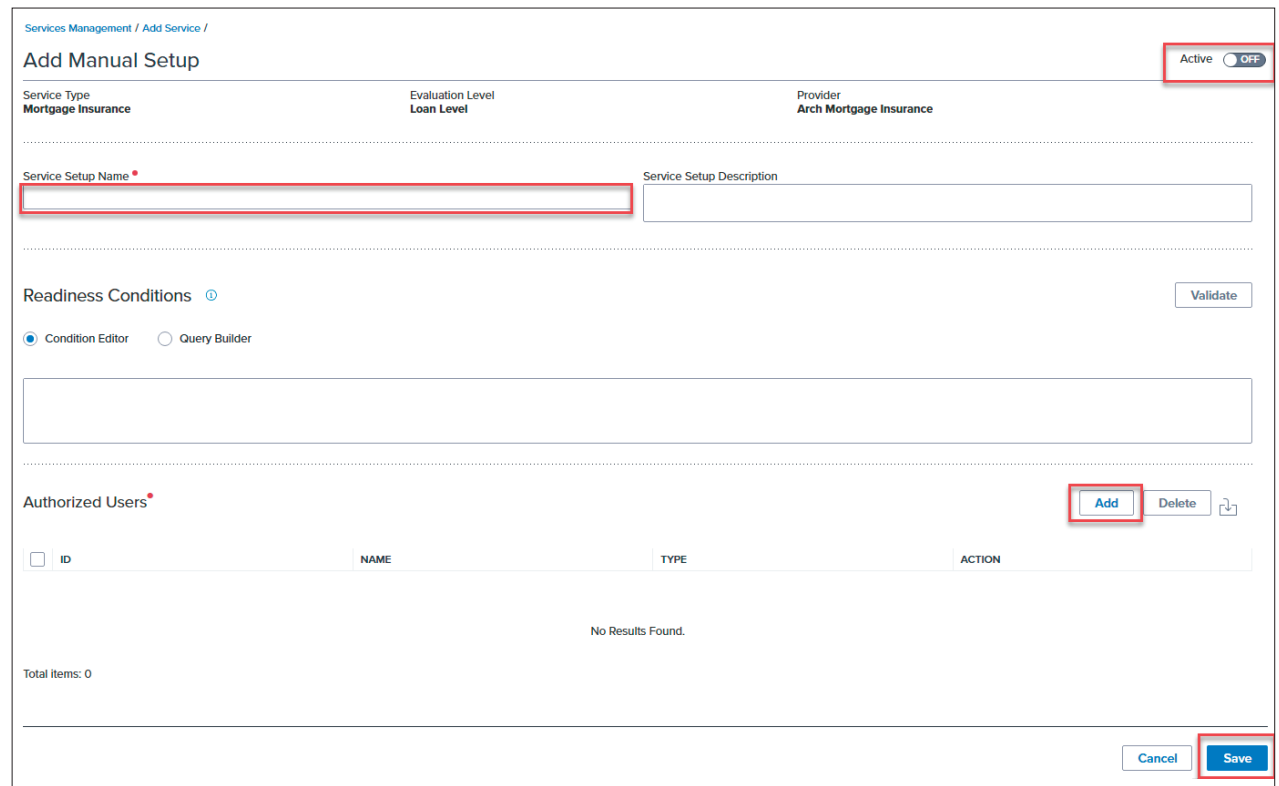


Services Management / Add Service | 24 Available Services

Search all

Sort A-Z Category Mortgage Insurance

ARCH MI - R2T Mortgage Insurance Manual Easy Order Automated	ARCH MI Rate Quote Comparison Mortgage Insurance Manual Easy Order Automated	ARCH MI Rate Quote Comparison - R2T Mortgage Insurance Manual Easy Order Automated	Arch Mortgage Insurance Mortgage Insurance Manual Easy Order Automated
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Services Management / Add Service / Add Manual Setup

Active OFF

Service Type: Mortgage Insurance Evaluation Level: Loan Level Provider: Arch Mortgage Insurance

Service Setup Name* Service Setup Description

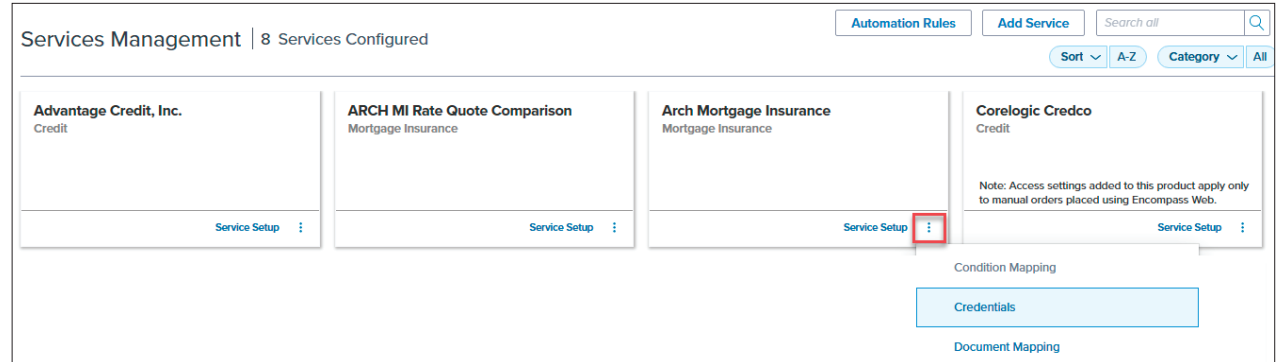
Readiness Conditions Condition Editor Query Builder

Authorized Users*

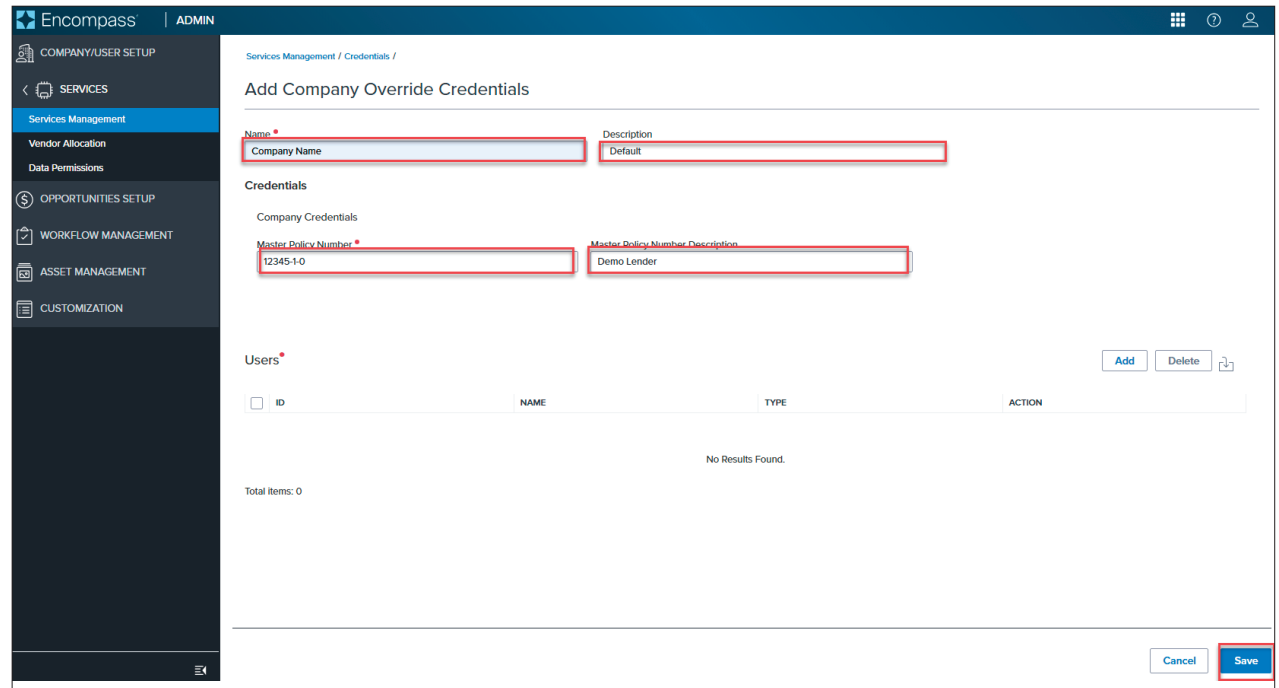
ID	NAME	TYPE	ACTION
No Results Found.			

Total Items: 0

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 Description**, then click **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 Credentials

Name ^{*}

Company Name Description

Default

Credentials

Company Credentials

Master Policy Number ^{*}

12345-1-0, 12345-13-0, 12345-8-0, 12345-10-0

Master Policy Number Description

ArchMI1, ArchMI2, ArchMI3, ArchMI4

Users ^{*}

<input type="checkbox"/>	ID	NAME	TYPE	ACTION
No Results Found.				

Total Items: 0

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 ^{*} Description

Credentials

Company Credentials

Master Policy Number ^{*} Master Policy Number Description

Users ^{*} Add Delete ↻

<input type="checkbox"/>	ID	NAME	TYPE	ACTION
No Results Found.				

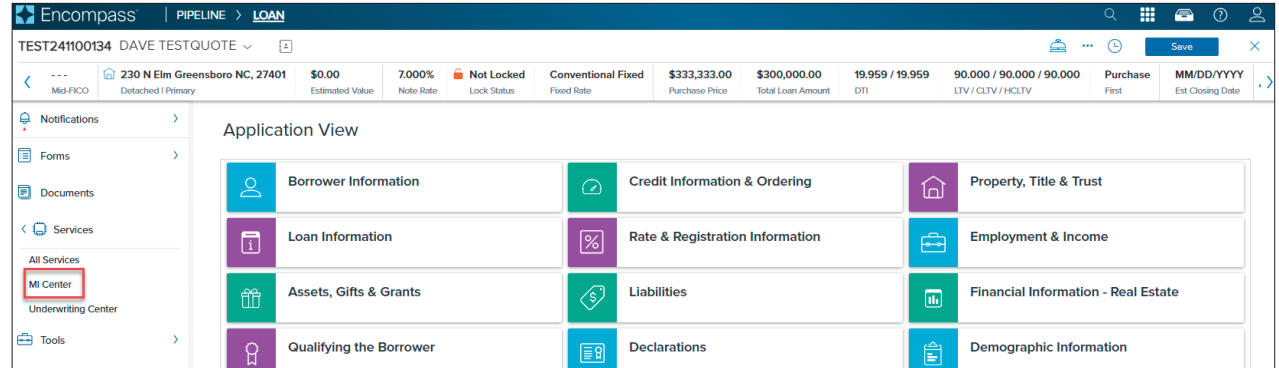
Total Items: 0

Cancel Save

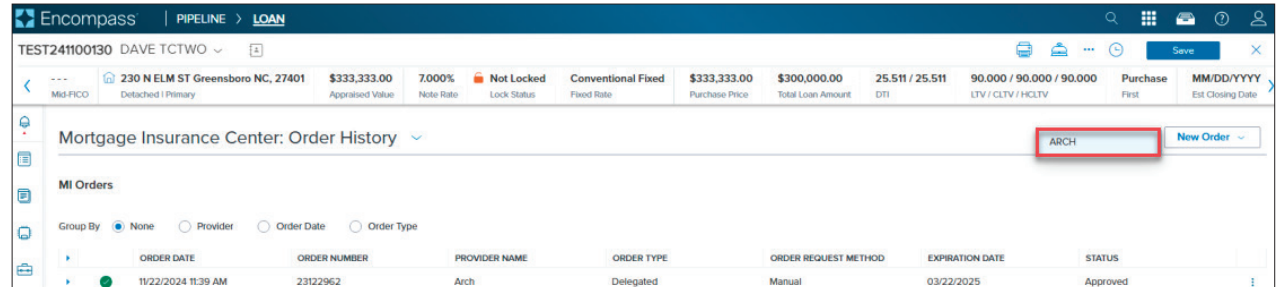
Admin Settings

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

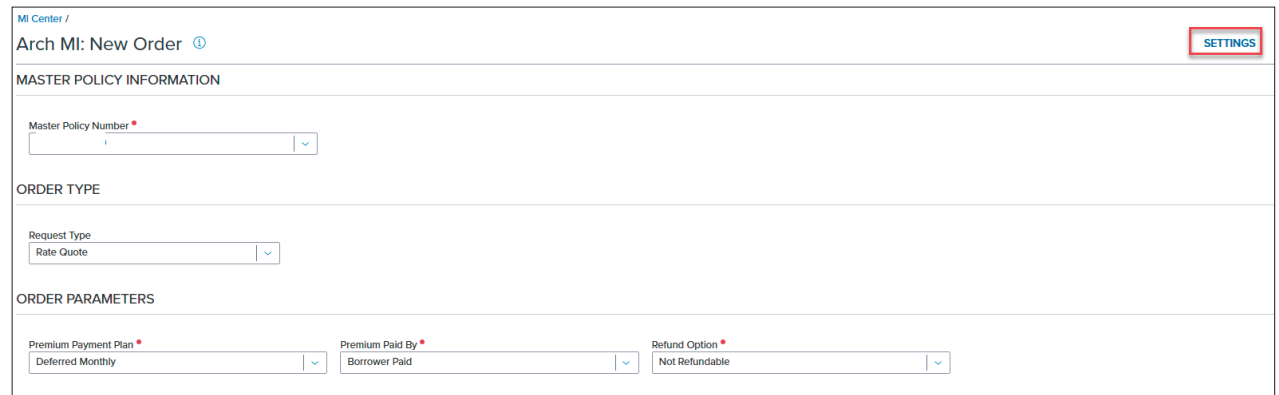


The screenshot shows the Encompass interface for a loan in the pipeline. The left sidebar contains a menu with 'MI Center' highlighted in a red box. The main area displays the 'Application View' with various information categories like Borrower Information, Credit Information & Ordering, Property, Title & Trust, etc.



The screenshot shows the 'Mortgage Insurance Center: Order History' screen. The 'ARCH' button is highlighted in a red box. Below it is a table of MI Orders with columns for ORDER DATE, ORDER NUMBER, PROVIDER NAME, ORDER TYPE, ORDER REQUEST METHOD, EXPIRATION DATE, and STATUS.

ORDER DATE	ORDER NUMBER	PROVIDER NAME	ORDER TYPE	ORDER REQUEST METHOD	EXPIRATION DATE	STATUS
11/22/2024 11:39 AM	23122962	Arch	Delegated	Manual	03/22/2025	Approved



The screenshot shows the 'Arch MI: New Order' screen with the 'SETTINGS' button highlighted in a red box. The screen is divided into sections: MASTER POLICY INFORMATION, ORDER TYPE, and ORDER PARAMETERS.

MASTER POLICY INFORMATION

Master Policy Number: [Dropdown menu]

ORDER TYPE

Request Type: Rate Quote [Dropdown menu]

ORDER PARAMETERS

Premium Payment Plan: Deferred Monthly [Dropdown menu] | Premium Paid By: Borrower Paid [Dropdown menu] | Refund Option: Not Refundable [Dropdown menu]

