

## **Accessing EPC with SmartClient**



This document is intended for users who access Encompass Partner Connect<sup>™</sup> through SmartClient and the Mortgage Insurance Center (MI Center).

J 🥥 🗹

Borrower Name 🔺

🏺 Arch Mi Demo Tra

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V Include Archive Loans View All Loans

- 1. Go to the **Pipeline View** and select the loan to be activated.
- 2. Select the **Tools** option on the left column or from the top header.

 Select MI Center from the drop-down list.

Forms	Tools	Services			
ECS Data	viewer		^		
Fee Variance Worksheet					
File Conta	acts				
Funding E	Balancing V	Vorksheet			
Funding V	Vorksheet				
Interim Se	ervicing Wo	rksheet			
LO Comp	ensation				
Loan Con	nparison				
Lock Comparison Tool					
Lock Req	uest Form				
MI Center					
Net Tangible Benefit					
Piggyback Loans					
Prequalifi	cation		×		
Show	/ in Alpha O	rder			

Pipeline View Super Administrator - Default View

TEST250300171

TEST250400228

Loan Folder Pipeline

|4 4 1-50 ∨ of 69 > >

Alerts Mess Linked Loan Number

Filter: None



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Loan P

Company Internal Organization

Loan Amount Loan Officer

60.000.00

360,000.00

360.000.00

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4. The Mortgage Insurance Center screen will open, providing options to Compare Rate Quotes or initiate a New Order.

MI Center	- • ×
Mortgage Insurance Center	(B)
<u>_</u>	
Select an action to start the mortgage insurance Compare Rate Quotes New Order	selection process

5. If placing a single MI order, click the **New Order** dropdown box and choose **ARCH**.



 The New Order screen will start the ordering process.
 (See user guides for ordering Rate Quotes, Delegated MI and Non Delegated MI.)

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/II Center /			
Arch MI: New Order 🕕			Setti
MASTER POLICY INFORMATION			
Master Policy Number •			
ORDER TYPE			
Request Type •			
ORDER PARAMETERS			
DRDER PARAMETERS	Premium Paid By •	Refund Option •	
DRDER PARAMETERS Premium Payment Plan * Deferred Monthly ~	Premium Paid By * Borrower Paid	Refund Option *	
Premium Payment Plan * Deferred Monthly Renewal Option * Constant	Premium Paid By • Borrower Paid Premium Financed	Refund Option ●     Not Refundable	Non Traditional Credit
Detered Monthly V	Premium Paid By * Borrower Paid Premium Financed Permium Financed	Refund Option *       V       Not Refundable       Relocation Loan	Non Treditional Credit
DERER PARAMETERS  Premium Payment Plan * Deferred Monthly  Renewal Option * Constant Special Loan Program Select Select V	Premium Paid By * Borrower Paid Premium Financed Requested MI Buydown Amount	Refund Option *     Not Refundable      Relocation Loan	Non Treditional Credit

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