GET CONNECTED

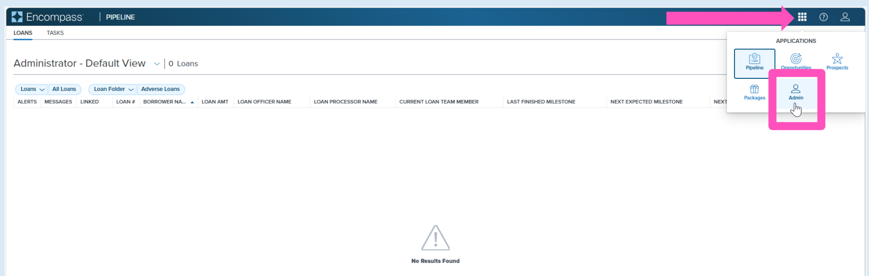
Quick Guides –Admin Setup in Encompass Partner Connect™

Last Revised Date: 02/12/2024

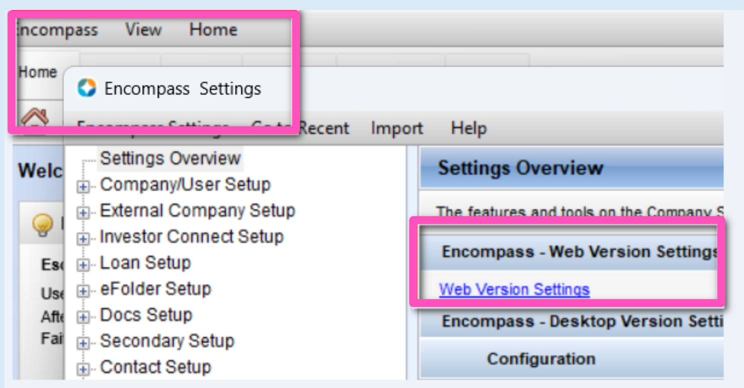
1. Access Web Settings

There are two ways to access Web Settings.

In EPC, select **Admin** from the waffle menu in the upper right corner.

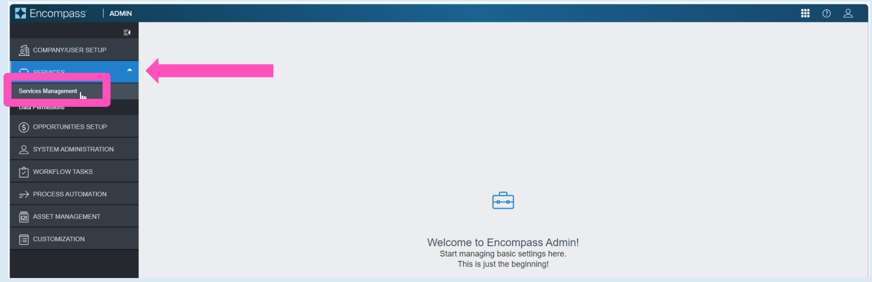


In EMN, navigate to **Encompass Settings**. Click **Web Version Settings**.

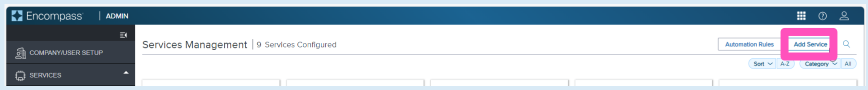


2. Setup Steps

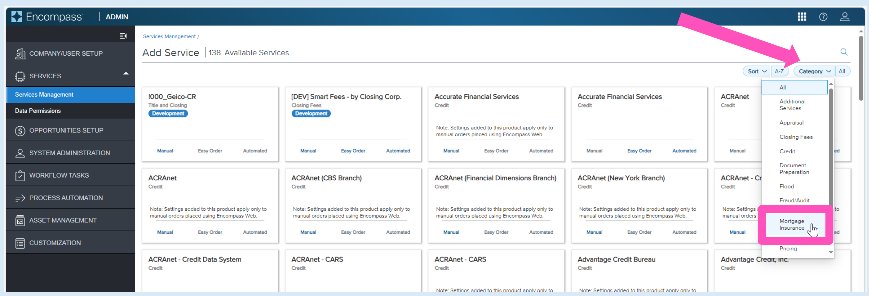
On the **Admin** screen, open the **Services** menu and select **Services Management.**



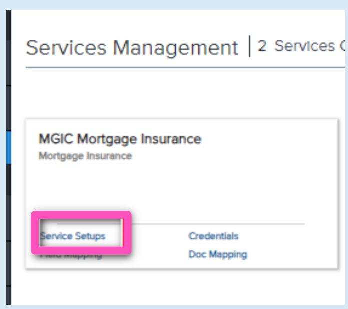
Select **Add Service.**



Select **Mortgage Insurance** from the **Category** drop-down list.



Select **MGIC Mortgage Insurance**, click **Service Setups** and click **Add.**

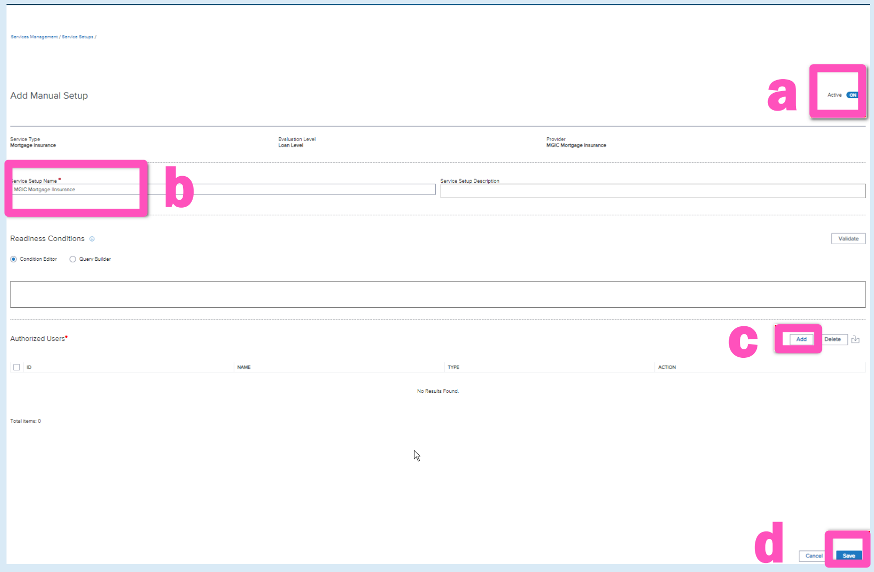


Contacts: MGIC Integration Services
Integration_services@mgic.com 1-888-644-2334

Your MGIC Representative
mgic.com/contact

You will be directed to the **Add Manual Setup** screen.

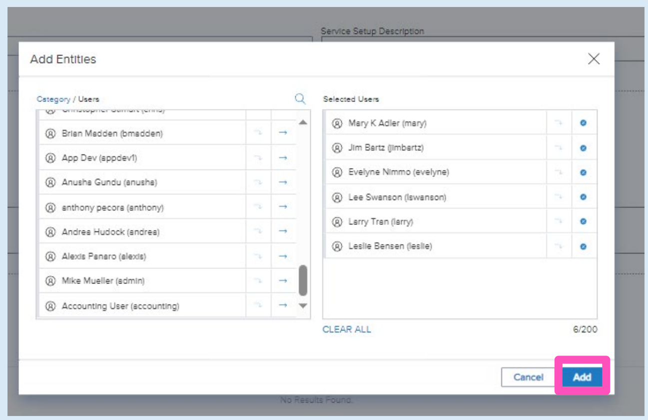
a) Click the **Active** button to turn the service on.
b) Enter a **Service Setup Name.**
c) Click the **Add** button to open the **Add Entities** window.
d) Once you've mapped users and closed the Add Entities window you will be returned to this screen. Click **Save.**



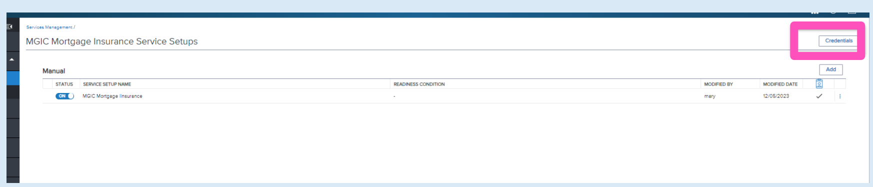
In the **Add Entities** window, select the user(s) you want to map from the **Category / Users** column and move them to the **Selected Users** column by clicking the **Arrow** icon. Click **Add.**

You will be returned to the **Add Manual Setup** screen. As stated in the previous step, you will need to click the **Save** button on that screen.

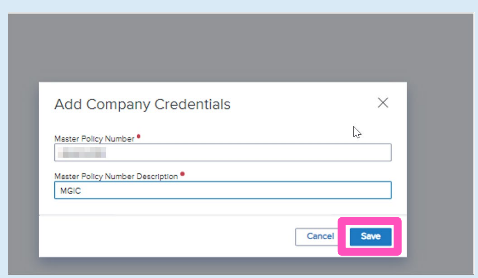
Note – If you need to remove a user from the **Selected Users** column, click the **X** button next to their name and they will be moved back to the **Category / Users** column.



On the MGIC Mortgage Insurance Service Setups screen, click the **Credentials** button.

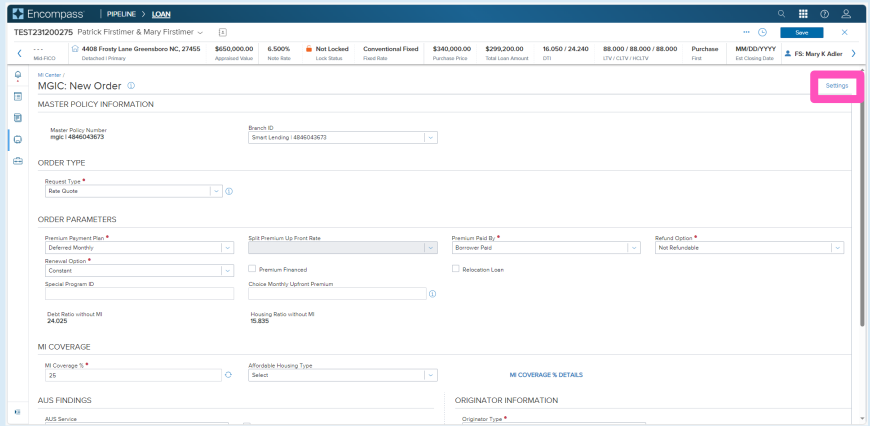


The Add Company Credentials window will open. Enter your MGIC **Master Policy Number** and a **Master Policy Number Description.** Click **Save.**



3. Admin Settings

From within a loan, go to the **MGIC: New Order** or **MGIC: Edit Order** screen. Click the **Settings** link in the upper right corner.



The **Admin Settings** window will open. Setting options are available for the following categories:

- **Branches**
- **Premium, Refund and Renewal Options**
- **Premium Payment Plan**
- **Persona Ordering Permissions**
- **MI Coverage Percentage**

Adjust the settings as applicable to add/edit/remove options as well as set default values.

Once you have adjusted the settings, click **Save**.

Note – Though these settings are accessed within a loan, they are global settings.