

Ordering Mortgage Insurance from National MI

Encompass User Guide

Dated: August 2014

National Mortgage Insurance Corporation | 2100 Powell Street | 12TH Floor | Emeryville, CA 94608 | www.nationalmi.com

Encompass User Guide

ORDERING MORTGAGE INSURANCE FROM NATIONAL MI

National MI is pleased to present these quick and easy steps for seamless submission of Mortgage Insurance Requests and Rate Quote transactions via Ellie Mae's Encompass Loan Origination System (LOS) - v3.0 and above

- Submit MI orders and request Rate Quotes without the need to leave Encompass
- Receive data responses to both orders and rate quotes, and view/save MI Commitments and Certificates in PDF format!
- Let's get started...

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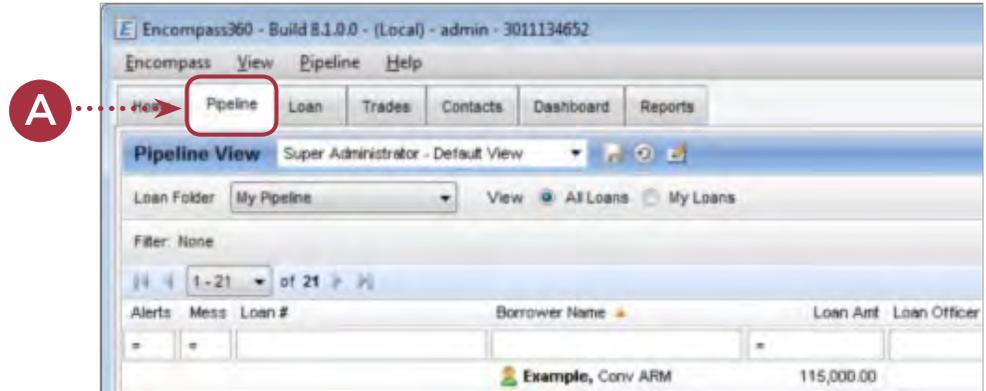
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(Quick Start)

Accessing National MI's Mortgage Insurance Ordering Page

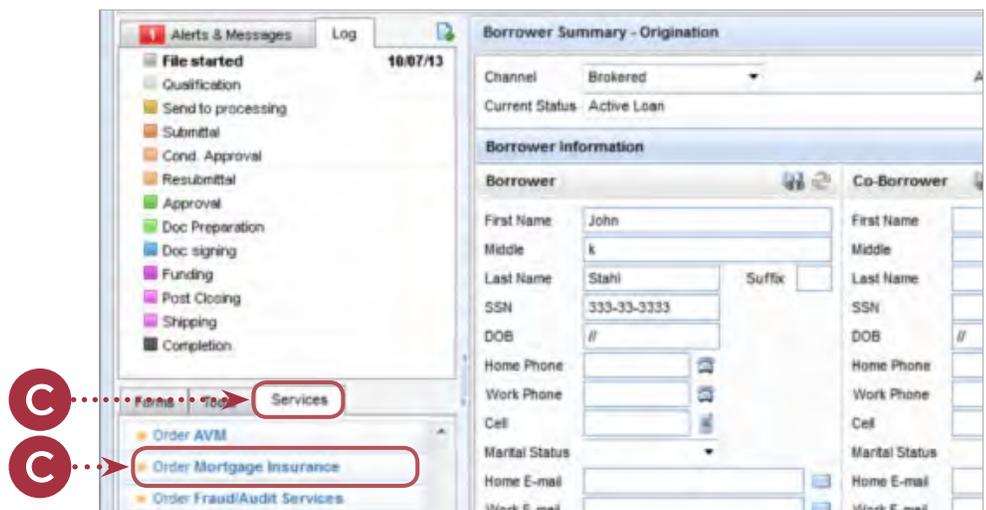
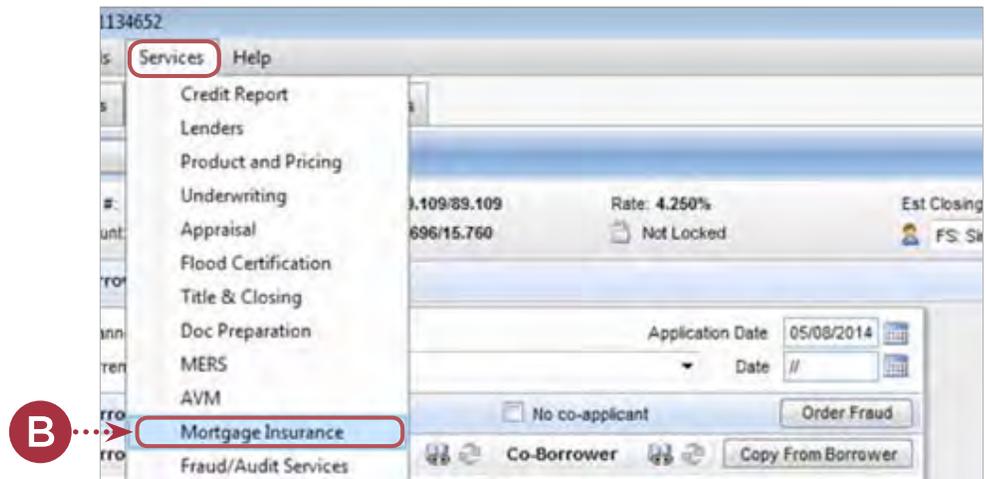
- A. Select the target loan from the **Pipeline** tab.



From the Encompass Loan screen, you can:

- B. Select **Mortgage Insurance** from **Services** listed at the top of the screen or

- C. Select the “**Order Mortgage Insurance**” link from the **Services** tab at the bottom left of the screen.



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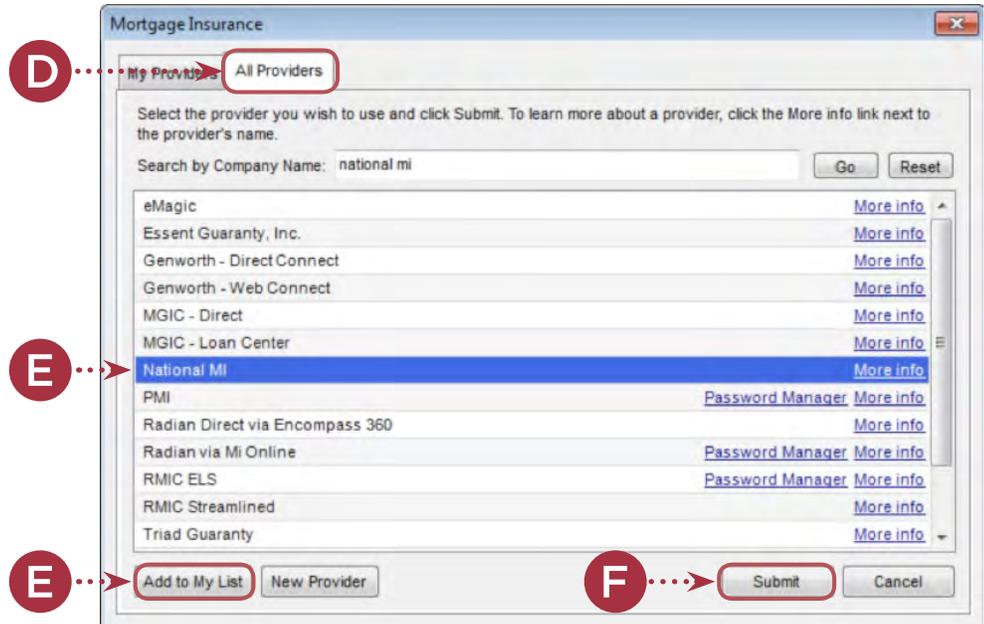
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D. If the My Providers screen is blank or if **National MI** does not appear, please select the **All Providers** tab.

E. Select **National MI** from the list of providers and then click the **Add to My List** button. **National MI** will now be available on the **My Providers** page.

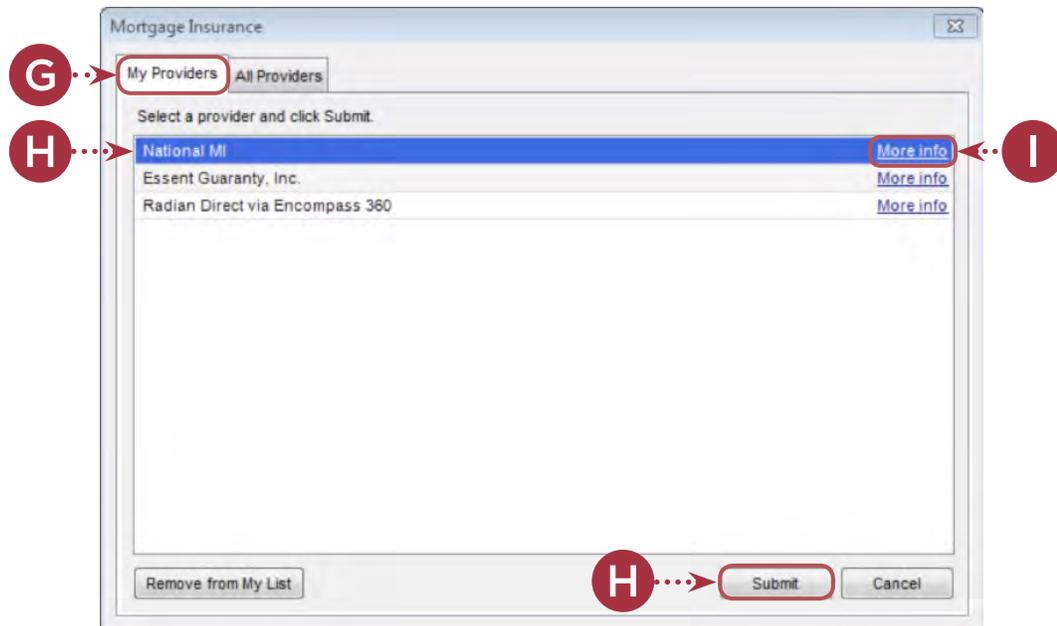
F. Similar to the **My Providers** window, select the **Submit** button to open the National MI Ordering page.



G. When selected, the **My Providers** page appears displaying the selected MI companies.

H. From this page, please select **National MI** and click the **Submit** button in order to select National MI from the Ordering Page.

I. Select the **More Info** link on the National MI row to learn how to get connected with National MI within Encompass.



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National MI Ordering Page

From this page, you can get a Rate Quote and submit (Delegated and Non-Delegated) MI orders to National MI.

Branch Login Information
Master Policy Number: 88881-0001
Branch ID: elliemae1
Branch Password: *****
 Save Login Information

Loan Information
Borrower: helen e kyacommon
CoBorrower: lee kyacommon
Loan Number: 1310EM000010
Visit [NationalMI.com - Rate, Guidelines, etc.](#)
For assistance contact Solution Center at 855.317.4NMI
or solutioncenter@nationalmi.com

Order Check Status / View Results (*) Required Fields

Request Type: Delegated Application *

Mortgage Insurance Information
Premium Payment Type: BorrowerPaid *
Premium Payment Plan: Standard Monthly *
MI Coverage %: 12 *
Refund Type: No Refund *
Renewal Option: Constant *

Additional Loan Information
Special Program ID: *
Special Pricing ID: Program 2
 Relocation Loan

Originator Information
Originator Channel: Non-Retail *
Third Party Company Name: ABC Broker

Attachments 0

Recommendation:
DU Recommendation Type: *
LP Credit Risk Class: Accept *
Purchase Eligibility: Eligible *

Order Cancel

National MI's Encompass Storefront Page

J. This screen provides contact information to Solution Center to help you get setup with National MI on Encompass as well as a link to National MI's website, www.nationalmi.com

K. Once you have completed reviewing this page, select the **Loan** tab at the top of the screen and then select the Mortgage Insurance Service option to access the National MI Ordering Page.

Encompass360 - Build 8.1.0.0 - (Local) - admin - 301134652

Encompass View Services View Help

Loan Services View Trades Contacts Dashboard Reports

NationalMI SM National MI AXIS

How to get Started

Login and get instant results when originating an MI order or requesting an MI rate quote. With one click, all of your loan information will be sent through our pricing and eligibility system and your MI submission response will be displayed on your Encompass360 page.

For New Users:
Contact National MI Solution Center at 855.317.4NMI (4664) or solutioncenter@nationalmi.com

For Existing Users:

- Please select the Loan tab to continue updating this record using Encompass.

For more information about National MI, please visit www.nationalmi.com

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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (cont.)

Entry Information

NATIONAL MI ORDERING PAGE	TYPE OF INPUT	ENTRY
Master Policy Number	Open text	Provided by National MI
Branch ID	Open text	Provided by National MI
Branch Password	Open text	Provided by National MI
Save Login Information	Check box	User selection. Save credentials for pre-population on future orders.
Visit NationalMI.com	http://www.nationalmi.com/	National MI home page
Request Assistance	Solutioncenter@nationalmi.com	National MI Solution Center
ORDER TAB		
Request Type	<ul style="list-style-type: none"> Rate Quote Delegated Application Non-Delegated Application 	User selection. Delegated Application submission requires prior approval.
Mortgage Insurance Information		Panel
Premium Payment Type	<ul style="list-style-type: none"> Borrower-Paid Lender-Paid 	User selection
Premium Payment Plan	<ul style="list-style-type: none"> Monthly ADVANTAGE Standard Monthly Annual Single 	User selection
MI Coverage%	Open text - numeric	National MI values.
Refund Type	<ul style="list-style-type: none"> No Refund Refund 	User entry
Renewal Option	<ul style="list-style-type: none"> Amortizing Constant No Renewals 	User entry
Finance Premium	Check box	User selection
Attachments	File/Document Selection	User selection
Additional Loan Information		Panel
Special Program ID	Open text	User entry
Special Pricing ID	Open text	User entry
Relocation Loan	Check box	User selection
Originator Information		Panel
Originator Channel	<ul style="list-style-type: none"> Retail Non-retail 	User selection
Third Party Company Name		Manual Input when Originator Channel value = Non-Retail
DU Recommendation Type	<ul style="list-style-type: none"> Approve / Eligible Approve / Ineligible EA-I / Eligible EA-II / Eligible EA-III / Eligible EA-I / Ineligible EA-II / Ineligible EA-III / Ineligible Refer with Caution / IV Out of Scope 	User selection
LP® Credit Risk Class	<ul style="list-style-type: none"> Accept Caution 	User selection
Purchase Eligibility	<ul style="list-style-type: none"> Eligible Ineligible A-Minus Eligible 	User selection

Requesting a Rate Quote

- A. Select Rate Quote from the **Request Type** drop-down field on the National MI Order page.
- B. Once the data entry has been completed, select the **Rate Quote** button at the bottom of the page.

The screenshot shows the 'National MI Request' web application. At the top, there is a 'Request Type' dropdown menu set to 'Rate Quote', highlighted with a red box and a red circle containing the letter 'A'. Below this, the form contains various input fields for 'Mortgage Insurance Information' (Premium Payment Type, Plan, Coverage %, Refund Type, Renewal Option) and 'Additional Loan Information' (Special Program ID, Pricing ID, Relocation Loan). At the bottom right, there is a 'Rate Quote' button highlighted with a red box and a red circle containing the letter 'B', next to a 'Cancel' button.

- C. When select **OK**, the MI Fee Import window will be displayed.

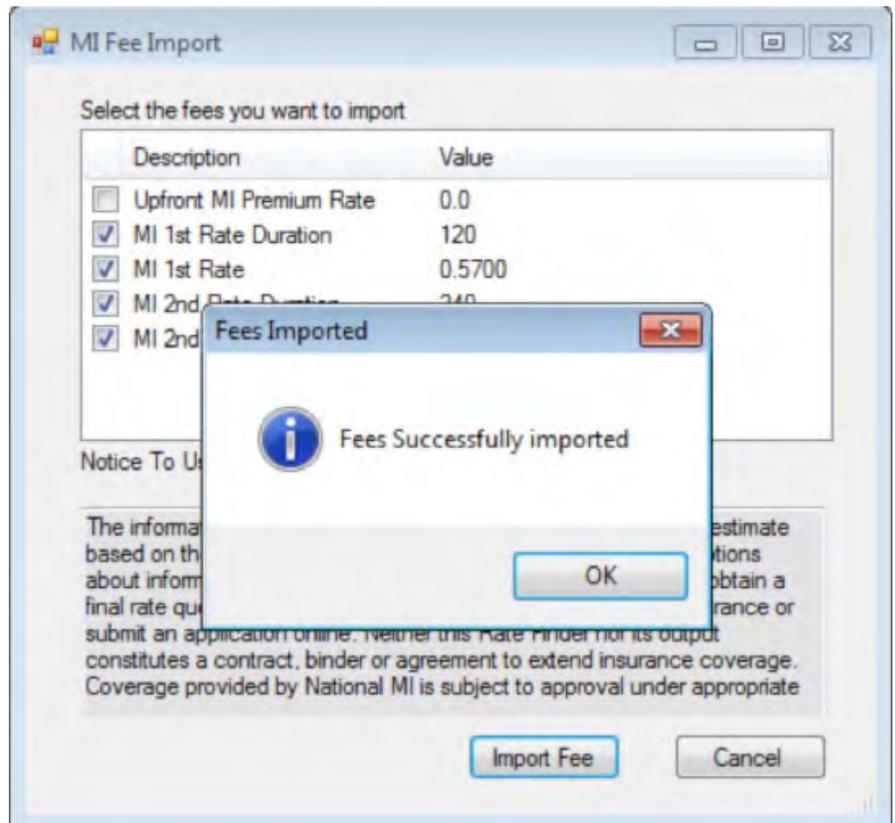
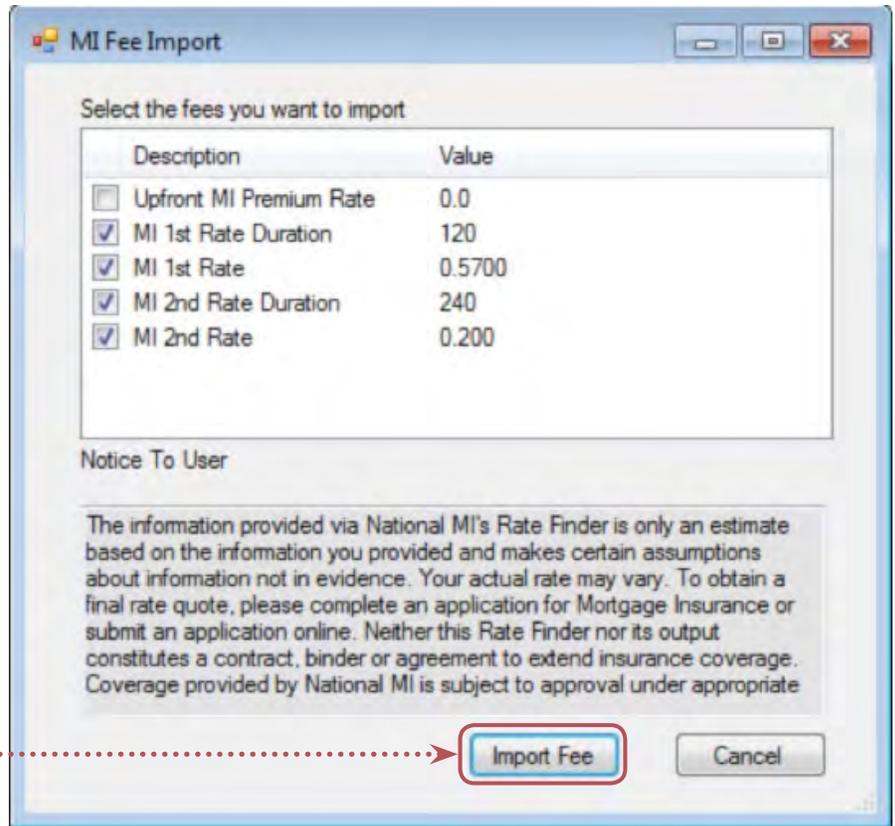
The screenshot shows a 'Please Wait ...' dialog box. In the center, there is a smaller window titled 'Rate Quote' with an information icon and the text: 'New files were downloaded NationalMI_RateQuote_Test_0001_05062014113607210.pdf'. At the bottom right of the 'Rate Quote' window, there is an 'OK' button highlighted with a red box and a red circle containing the letter 'C'. Below the 'Rate Quote' window, there is a 'Cancel' button.

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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (cont.)

- D. Select the **Import Fee** button to import the MI Rate information into Encompass.

The user will receive the following message when the MI Rate information has been successfully imported into Encompass: Check Status / View Results Tab for Rate Quote Submission



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E. The **Check Status / View Results** page will appear. If a quote is successfully generated, the **Rate Quote pdf** will appear on the lower portion of the screen where you can double click the highlighted **blue row** or click **View**.

NationalMI
SM

Branch Login Information
 Master Policy Number: 88881-0001
 Branch ID: ellieae1
 Branch Password: *****
 Save Login Information

Loan Information
 Borrower: John Q. Public
 CoBorrower:
 Loan Number: Test_0001
 Visit [NationalMI.com - Rate, Guidelines, etc.](#)
 For assistance contact Solution Center at 855.317.4NMI
 or solutioncenter@nationalmi.com

Order | Check Status / View Results (*) Required Fields

Order No.	Order Date	Product Name	Status
RateQuote1	05-06-2014 09:36:39 AM	Rate Quote	Successful

Upload Import

NationalMI_RateQuote_Test_0001_05062014113607210.pdf

View Cancel

View Your Rate Quote PDF

NationalMI
Your Rate Quote
GENERATED ON 5/6/2014

MASTER POLICY NUMBER: 88881-0001	LENDER: TESTIMP2
BORROWER LAST NAME: Public	PROPERTY: 121 Frankly My Dear Parkway, San Ramon, CA 94585

YOUR QUOTE DETAILS:

Field Type: Borrower Paid	Premium Plan Type: Monthly ADVANTAGE	Refund Type: No Refund	Coverage: 35% Coverage	Renewal Option: Constant
---------------------------	--------------------------------------	------------------------	------------------------	--------------------------

Premium Rate Information:

Base Rate:	0.57%
Total Initial Rate:	0.57%
Initial Premium Amount:	\$42.75
Total Premium Due:	\$42.75
Renewal 1:	0.57% / Years 0-30
Renewal 2:	0.20% / Years 31-Term

INFORMATION PROVIDED:

Loan Amount: \$90,000.00	Loan Purpose: Purchase	Amortization Term: 360 Months	Amortization Type: Fixed
Interest Rate: 4.875%	Loan-to-Value (LTV) / CLTV: 89.11% / 89.11%	PITI: \$476.29	AUS System: Desktop Underwriter
AUS Decision: Approve / Eligible	Occupancy: Primary Residence	Representative Credit Score: 703	Property Type: Single Family Detached
Debt to Income Ratio (DTI): 13.63%	Buydown: No	Corporate Relocation: No	

Thank you for choosing National MI

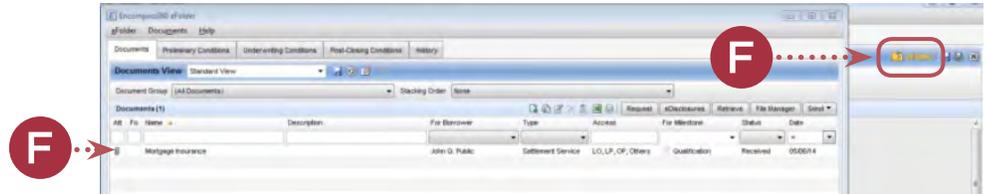
For additional assistance, contact solution center at solutioncenter@nationalmi.com or call 855.317.4NMI (4384). For complete underwriting guidelines and rate details, please visit www.nationalmi.com.

The information provided via National MI's Rate Finder is only an estimate based on the information you provided and makes certain assumptions about information not in evidence. Your actual rate may vary. To obtain a final rate quote, please complete an application for Mortgage Insurance or submit an application online. Remember this Rate Finder tool is subject to underwriting guidelines and is not a guarantee of insurance coverage. Coverage provided by National MI is subject to approval under applicable National MI Underwriting Guidelines and Rates in effect on the date an insurance commitment is issued.

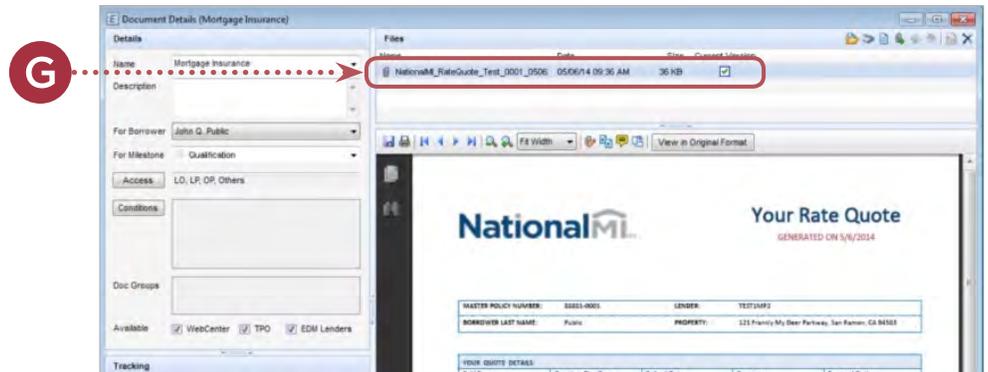
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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (cont.)

F. The document will also be saved to the **eFolder**  (select the eFolder link in the top right corner of the screen while in the loan you are working from, and the Encompass eFolder will be displayed).

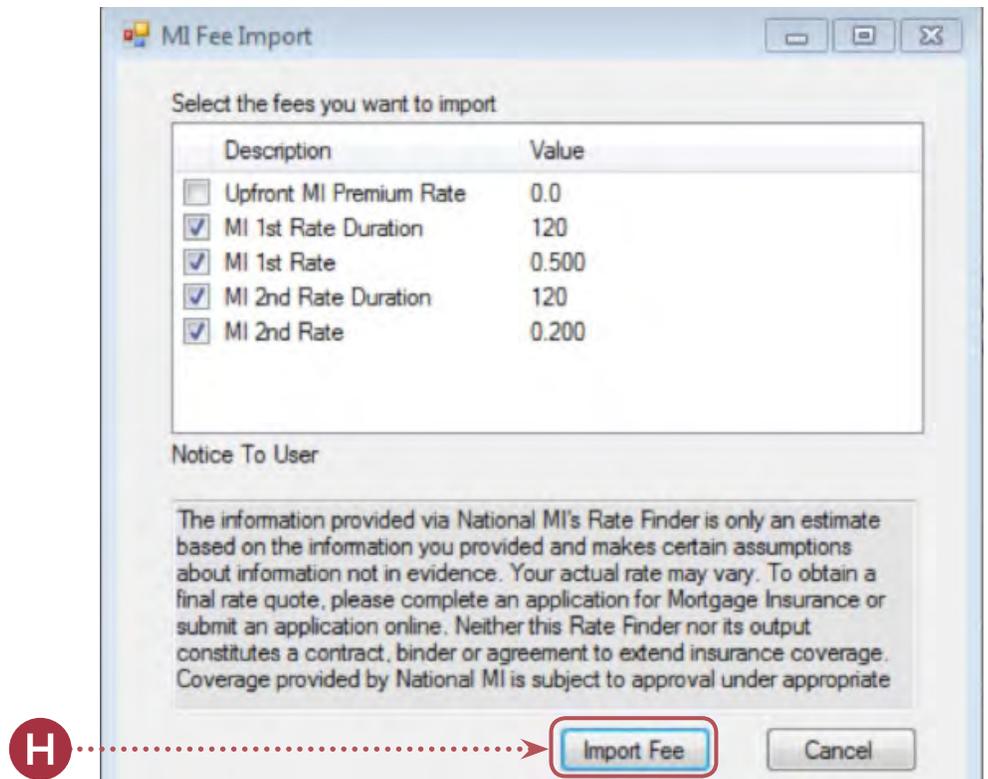


G. By double-clicking on the selected document, it will open a **Document Details** window which will display the filename at the top to view the document.



MI Fee Import Screen

H. This screen is displayed if a successful response is received by Encompass. These fields can be imported into Encompass when the **'Import'** or **'Import Fee'** buttons are clicked. The MI Fee can be imported either from successful Rate Quotes or MI Orders.



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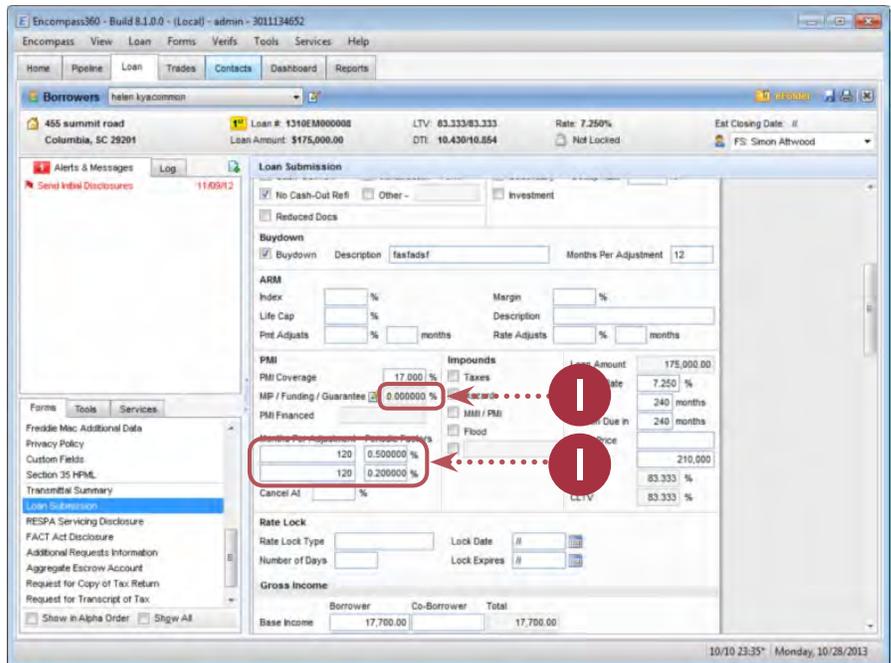
MI Fee Import Field Mapping

NATIONAL MI FEE IMPORT	ENCOMPASS LOAN SUBMISSION SCREEN FIELD
Upfront MI Premium Rate	MIP / Funding / Guarantee
MI 1st Rate Duration*	Months Per Adjustment
MI 1st Rate*	Periodic Factors %
MI 2nd Rate Duration	Months Per Adjustment
MI 2nd Rate	Periodic Factors %

* Please note that National MI's Monthly ADVANTAGE Premium Plan will not display an Upfront MI Premium Rate value in the screen above as it is rolled into the MI 1st Rate / Duration period.

MI Fee Import Field Locations

- When selecting the Loan Submission screen link in the Forms tab, the user can view the location where the MI Fee data was imported.



Submitting a MI Order Request

- J. To submit a Delegated or Non-Delegated MI Order, please select the “**Delegated Application**” or “**Non-Delegated Application**” value in the **Request Type** drop-down field, complete all applicable mandatory and optional fields on this screen and click the **Order** button at the bottom of the page.

The screenshot shows the 'National MI Request' form. The 'Request Type' dropdown is set to 'Delegated Application'. The 'Order' button is highlighted with a red box and a red 'J' callout. The form includes the following fields:

- Branch Login Information:** Master Policy Number (99981-0001), Branch ID (elliemae1), Branch Password (masked), Save Login Information (checked).
- Loan Information:** Borrower (lee kyacommon), CoBorrower (helen e kyacommon), Loan Number (1310EM000011). Includes links for NationalMI.com - Rate, Guidelines, etc. and Solution Center contact info.
- Mortgage Insurance Information:** Premium Payment Type (BorrowerPaid), Premium Payment Plan (Monthly ADVANTAGE), MI Coverage % (30), Refund Type (No Refund), Renewal Option (Constant), Finance Premium (unchecked), Attachments.
- Additional Loan Information:** Special Program ID, Special Pricing ID, Relocation Loan (unchecked).
- Originator Information:** Originator Channel (Retail), Third Party Company Name.
- Recommendation:** DU Recommendation Type, LP Credit Risk Class (Accept), Purchase Eligibility (Eligible).

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Check Status / View Results tab for MI Orders

K. If you get an Approved response for an MI Order, you can view the **Commitment and Certificate of Insurance** by selecting the PDF document and selecting the "View" button. The **Import** button below will also import the MI Fee information into Encompass.

National MI Request

NationalMISM

Branch Login Information
 Master Policy Number: 88881-0001
 Branch ID: elliemae1
 Branch Password: ●●●●●●
 Save Login Information

Loan Information
 Borrower: Helen G kyacommon
 CoBorrower: lee H kyacommon
 Loan Number: 1310EM000078
 Visit [NationalMI.com - Rate Guidelines, etc.](#)
 For assistance contact Solution Center at 855.317.4NMI or solutioncenter@nationalmi.com

Order | Check Status / View Results | (*) Required Fields

Order No.	Order Date	Product Name	Status
1000004322	10-31-2013 12:50:56 PM	MortgageInsurance	Success
RateQuote7	10-31-2013 12:50:27 PM	Rate Quote	Successful
RateQuote6	10-31-2013 12:49:26 PM	Rate Quote	Successful
RateQuote5	10-31-2013 11:39:23 AM	Rate Quote	Successful
RateQuote4	10-31-2013 11:33:29 AM	Rate Quote	Successful
RateQuote3	10-31-2013 09:53:40 AM	Rate Quote	Successful
RateQuote2	10-31-2013 08:26:08 AM	Rate Quote	Successful
RateQuote1	10-30-2013 11:22:19 PM	Rate Quote	Successful

Upload Import

Commitment_1000004322.pdf

Sample MI Commitment and Certificate of Insurance

NationalMI COMMITMENT AND CERTIFICATE OF INSURANCE

INSURED'S NAME: TEST1MP2 Mailing Address:
 BORROWER NAME: Helen kyacommon, lee kyacommon Property Address: 455 summit road Charlotte, NC 28229

Master Policy Number: 88881-0001 Insured Loan Number: 1310EM000078

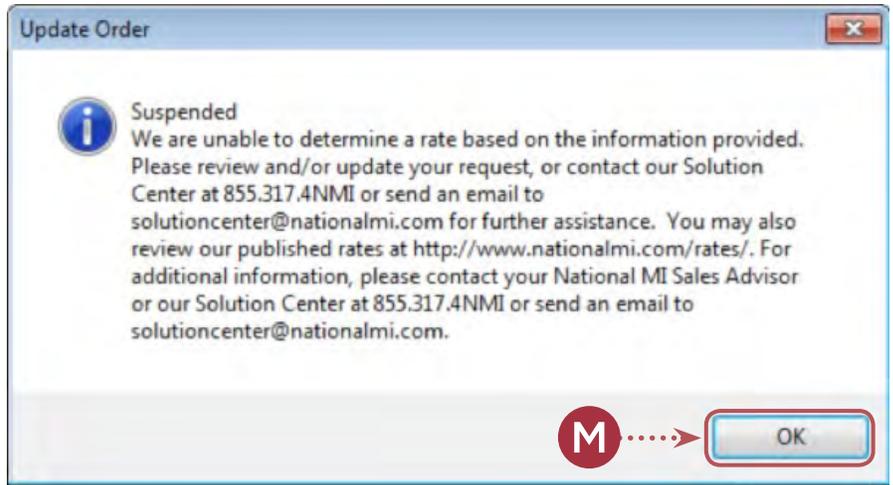
COMMITMENT/CERTIFICATE NO. 1000004322	Commitment Effective Date: 10/31/2013	Commitment Term: 4 Months	Commitment Expiration Date: 02/28/2014
Base Loan Amount: \$75,000.00	Original Value: \$93,000.00	Sales Price: \$93,000.00	Property Type: Single Family Attached
Doc Type: Full Doc	Loan Purpose: Purchase	Occupancy Type: Primary Residence	Loan Term: 300 Months
Loan Type: Fixed	Total Housing Ratio: 7.93%	Total Debt Ratio: 16.37%	Amortization Term: 300 Months
Premium Plan Type: Monthly ADVANTAGE	Coverage Percentage: 12%	Loan-to-Value (LTV): 80.65%	Paid Type: Borrower Paid
Premium Rate Information: Initial Premium Rate: 0.25% / Years 2-10 Initial Premium: \$15.63 Renewal 1: 0.25% / Years 2-10 Renewal 2: 0.20% / Years 11-Term			
Submission Type: Delegated	Refund Type: No Refund	Renewal Option: Constant	Total Amount Due Now: \$0.00

GENERAL AND SPECIAL CONDITIONS
 Endorsements - Delegated Review Endorsement, North Carolina State Variation Endorsement

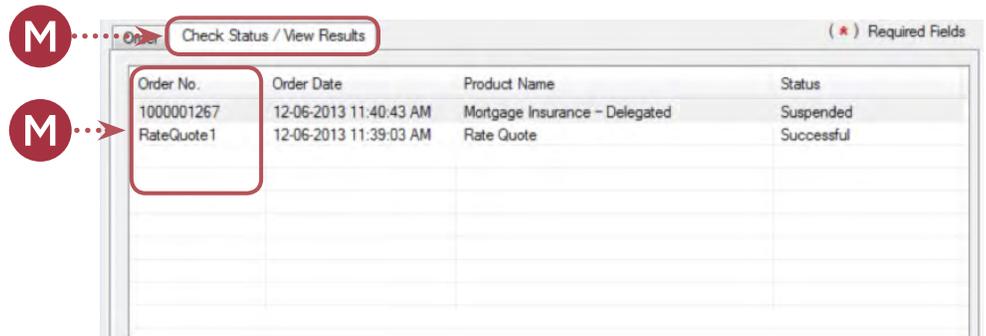
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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (cont.)

- L. If a Suspended response appears with your MI Order, you will receive an error message(s), for example:



- M. By selecting **OK**, you will go back to the National MI Order page on the **Check Status/View Results** tab, which will display the Suspended Status and the National MI Certificate number will be displayed in the **Order No.** column.



Determine whether you can resolve the issue through the MI Order page and/or by the Loan data screens before resubmitting the request. National MI's Solution Center will also be notified of the Suspended transactions and can assist you to resolve any issues.

Updating Data and Resubmissions

N. For those transactions that require corrections or updates to a Delegated MI order after receiving a National MI Certificate number, select the **“Resubmit Delegated”** value in the **Request Type** drop-down field and click the **Order** button.

Note: The National MI Certificate number is displayed on the Order screen below, if applicable.

Resubmissions are not allowed for Non-Delegated MI orders. If you have updates that you would like to provide National MI on a Non-Delegated MI order, please contact National MI’s Solution Center at **855.317.4NMI** or solutioncenter@nationalmi.com

The screenshot shows the 'National MI Request' form. The 'Request Type' dropdown is set to 'Resubmit Delegated' and is highlighted with a red box and a red 'N' callout. The 'Order Number' field is also highlighted with a red box and a red 'N' callout. The 'Order' button at the bottom right is also highlighted with a red box and a red 'N' callout. The form includes fields for Master Policy Number, Branch ID, Branch Password, Borrower, CoBorrower, Loan Number, Premium Payment Type, Premium Payment Plan, MI Coverage %, Refund Type, Renewal Option, Finance Premium, Attachments, DU Recommendation Type, LP Credit Risk Class, and Purchase Eligibility. There are also links for NationalMI.com and Solution Center contact information.

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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (Submitting Documents using Docs Exchange)

Submitting Documents to National MI

National MI offers the convenience of uploading documents within Encompass with Docs Exchange.

Attaching Document Images from the Order Tab

If you would like to provide Document images to National MI as a part of the MI Order Request or as a part of any subsequent data update/resubmission, you can do so through the **Order** screen, displayed below.

A. After entering the applicable data on the **MI Order** page, select the **magnifying glass** icon located next to the label **Attachments**. This will display the **Attachment Display** window.

To view the list of required documents, please go to:

- nationalmi.com/del-reqdocs for Delegated underwriting channel or
- nationalmi.com/nondel-reqdocs for Non-Delegated underwriting channel and compliance.

The screenshot shows the 'National MI Request' window. The 'Attachments' field is located in the 'Mortgage Insurance Information' section. A red circle with the letter 'A' is placed over the magnifying glass icon next to the 'Attachments' label. A red dotted arrow points from this icon to the magnifying glass icon in the 'Attachments' field.

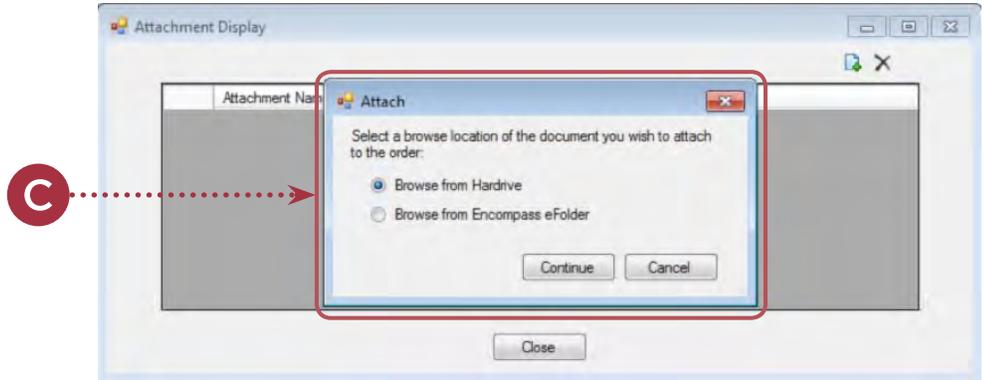
B. To include a document image file(s) select the  icon.

The screenshot shows the 'Attachment Display' window. A red circle with the letter 'B' is placed over a document icon in the top right corner of the window. A red dotted arrow points from this icon to the document icon in the top right corner of the window.

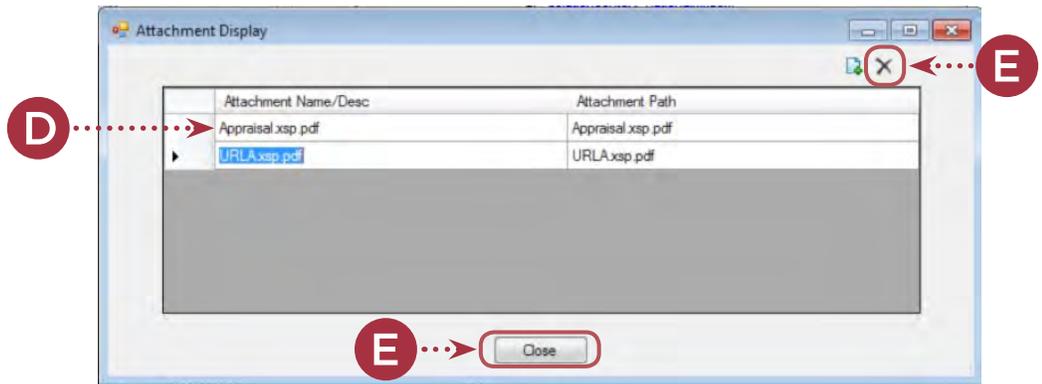
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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (Submitting Documents using Docs Exchange)

- C. The **Attach** pop-up window will appear to allow you to add files either from your local network folder or from the Encompass eFolder location.



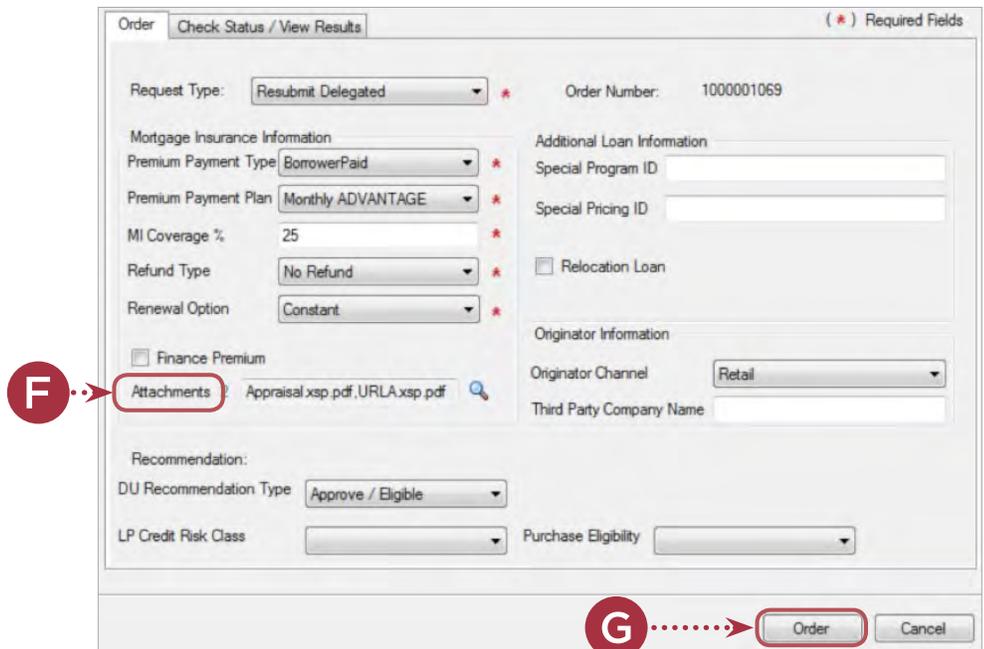
- D. Once the files have been selected, you can view the selected files in the **Attachment Display** window, and continue to add more files.



- E. Click the **X** icon to remove the selected document from the list, or click the **Close** button to return back to the Order window.

- F. The **Attachments** field will display the filenames of the document(s) that were attached in the prior window.

- G. When you are ready to submit/resubmit the requested data and document image(s), select the **Order** button to send the request with document image(s) attached.



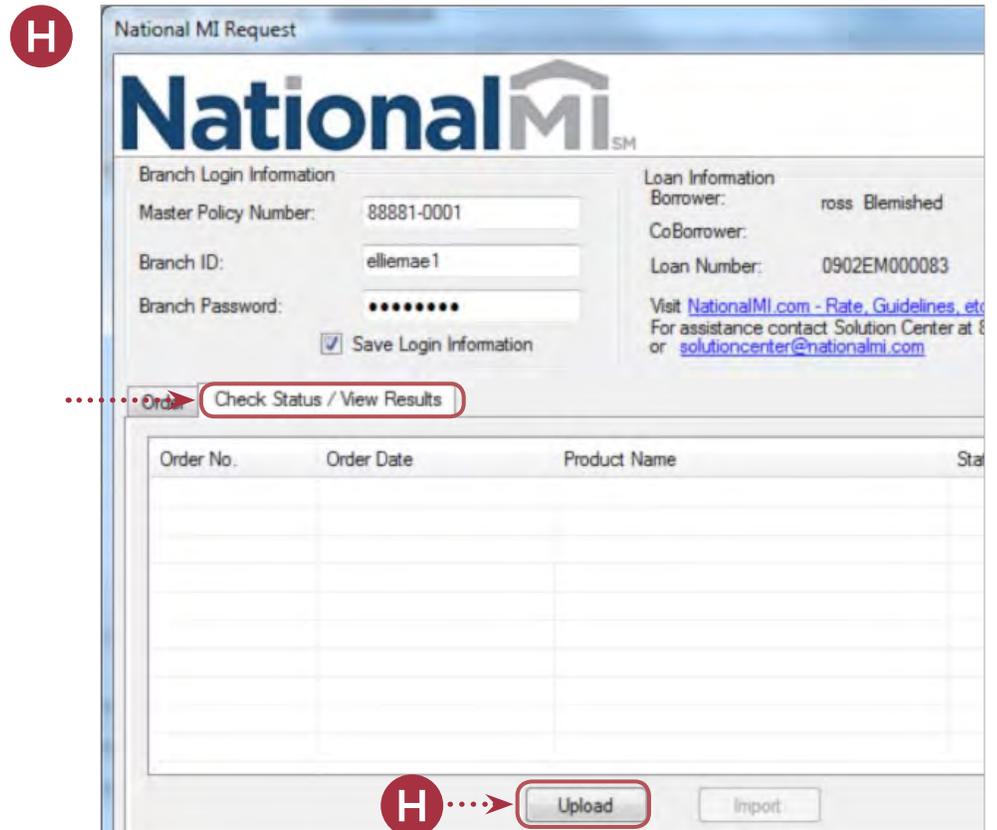
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ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (Submitting Documents using Docs Exchange)

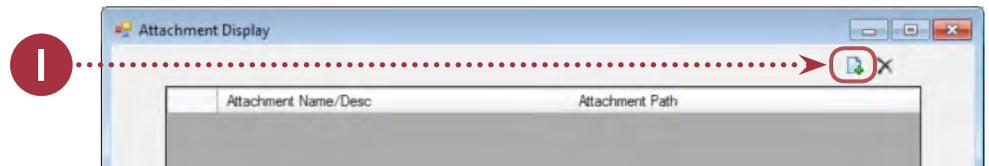
Attaching Document Images from the Check Status/View Results Tab

- H. To send document image(s) subsequent to an **MI Order** request/resubmission, use the **Upload** button on the **Check Status/View Results** tab.

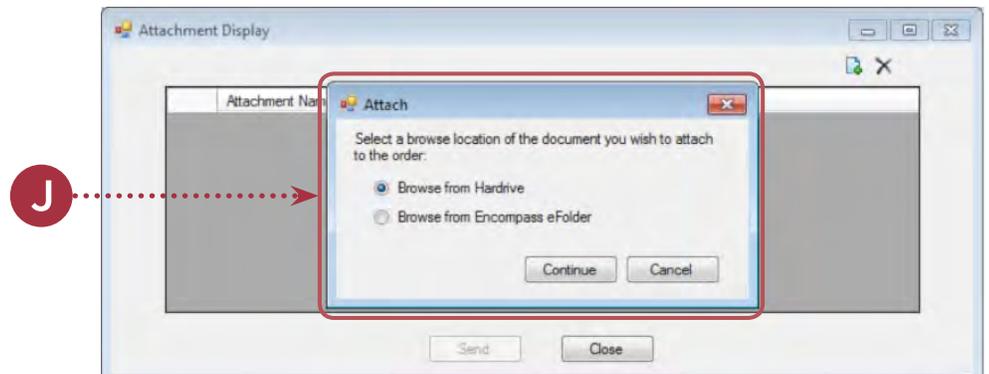
This process supports the submission of trailing documents for Non-Delegated applications or for loan review related to a Delegated Assurance Review.



- I. To include a document image file(s) select the  icon.



- J. This will display the **Attach** pop-up window to add files either from the local or network folder, or from the Encompass eFolder location.



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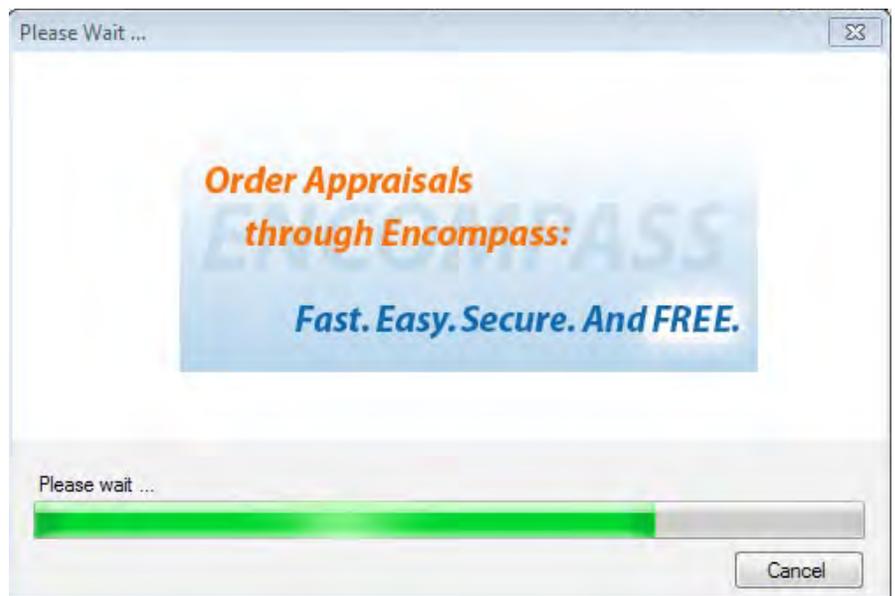
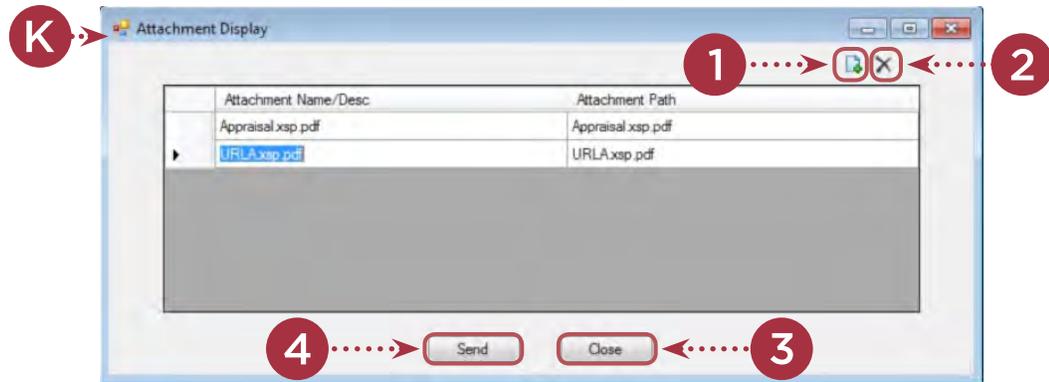
ORDERING MORTGAGE INSURANCE FROM NATIONAL MI (Submitting Documents using Docs Exchange)

K. Once the files have been selected, you will see the selected files in the **Attachment Display** window and you can:

1. Continue to add more files.
2. Click the **X** icon to remove the selected document from the list.
3. Click the **Close** button to return back to the Check **Status/View Results** window.

This will remove the selected documents from the list.

4. Click the **Send** button to send the document image(s) to National MI.

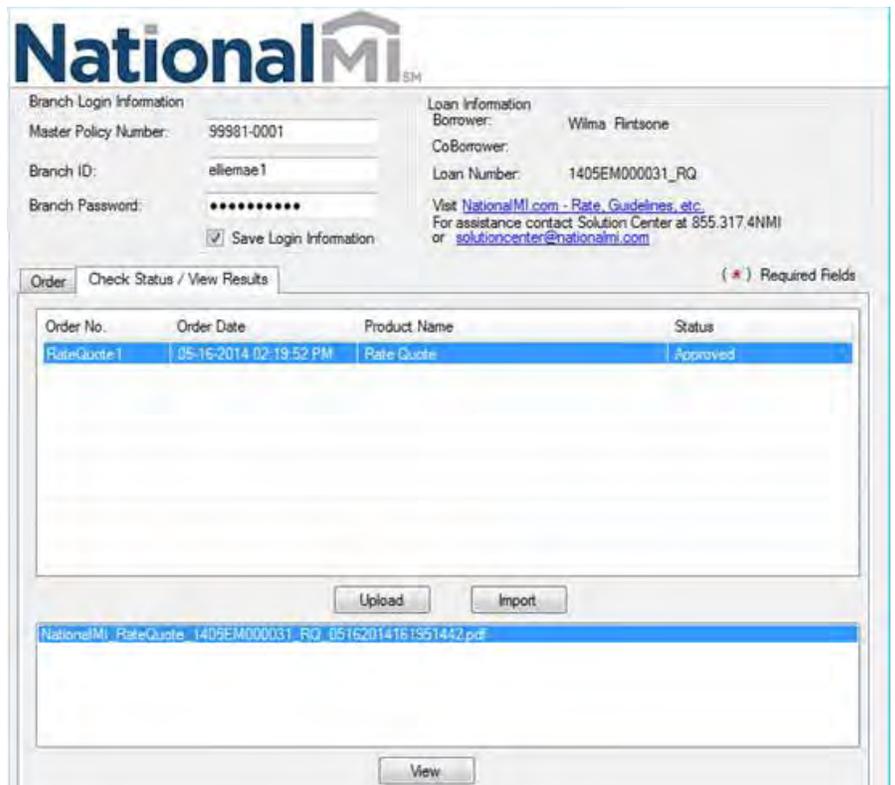
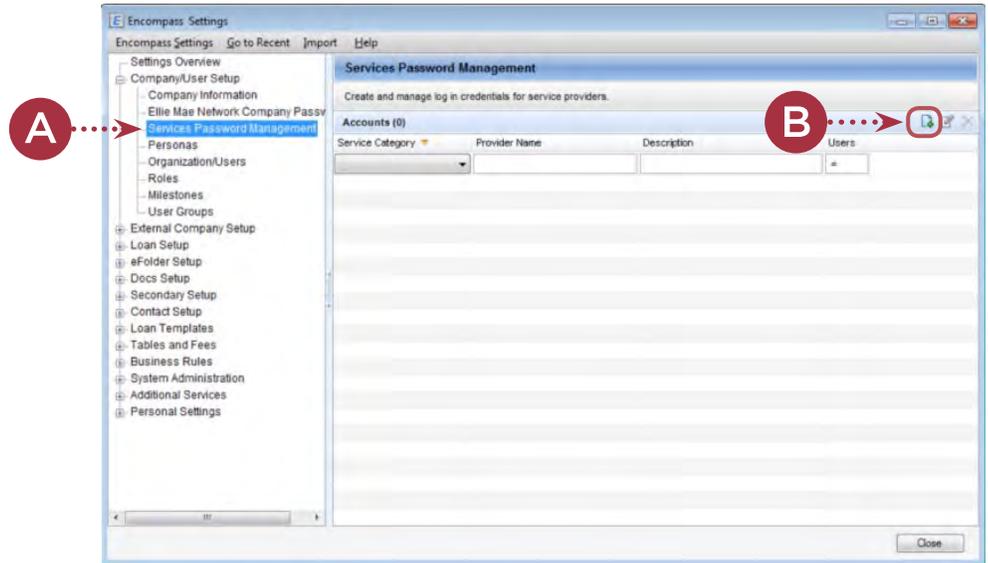


Services Password Management

A. This feature allows you to prepopulate the Master Policy Number and credentials for users selecting National MI as their Mortgage Insurance provider. The feature will work in conjunction with the user/group profiles. The user/group profiles are described in detail in the Encompass help.

B. To add an account, click on the  icon.

Note: If the user already has prepopulated credentials and changes are made to those credentials, the end user will have to exit out of Encompass and reenter the application for the credential download to occur.



Encompass User Guide

ORDERING MORTGAGE INSURANCE FROM NATIONAL MI

(Administrator Guide)

Password Manager – User Persona

National MI uses the Encompass Manager to control what the user can order.

- C.** The **Request Type** is controlled by a User Persona. As an example, the User Personas of Loan Officer and Loan Processor will be able to order **Rate Quote**.

However, the User Personas of Loan Processor and Underwriters will be able to order MI Application Requests.

You should setup the user personas accordingly.

This is an Encompass Banker feature only.

- D.** A persona can be created in Encompass to restrict the Loan Officer from ordering MI. You can create the persona “NationalNoMi” and “NationalNoMiDlgt”. When the personas are created, they must be assigned to the user. In the case of “NationalNoMi”, when this persona is assigned to a user, it will restrict the user from ordering MI, however they will be able to order Rate Quotes.

Please see the table for assigned rights for ordering.

PERSONA	RATE QUOTE	DELEGATED	NON-DELEGATED
No Persona	Yes	Yes	Yes
NationalNoMi	Yes	No	No
NationalNoMiDlgt	Yes	No	Yes
No access to interface	No	No	No

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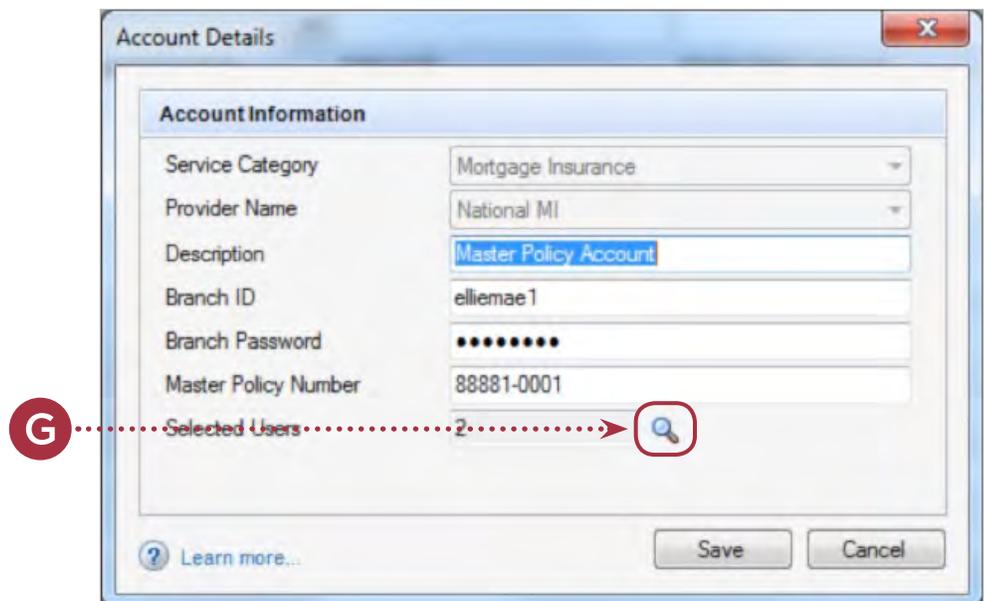
E. The next step is to assign the user the persona restriction.



F. Create the account in the Password Manager for National MI.



G. Complete the account information for National MI and assign users by clicking the magnifying glass icon.



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H. Assign the personas created in the **Selected Users** panel.

After completing this step, exit out of the Encompass admin tool and launch the National MI order page.

When logging in as one of the users, the credentials should auto-populate the order form and apply the restrictions.

If the information is incorrect the user may get an invalid credential error message requiring the Password Manager account to be deleted and re-entered.

H

