

ICE Mortgage Technology®

Encompass Partner Connect (EPC) MI Center

Administrator Guide

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Admin Services Setup

The MI Center has 4 functions for each MI Provider:

- 2 for the Rate Quote Comparison function, and
- 2 for the Radian MI function.

In order for users to import quotes, it is necessary to complete setup for both the Rate Quote Comparison and Radian MI functions.

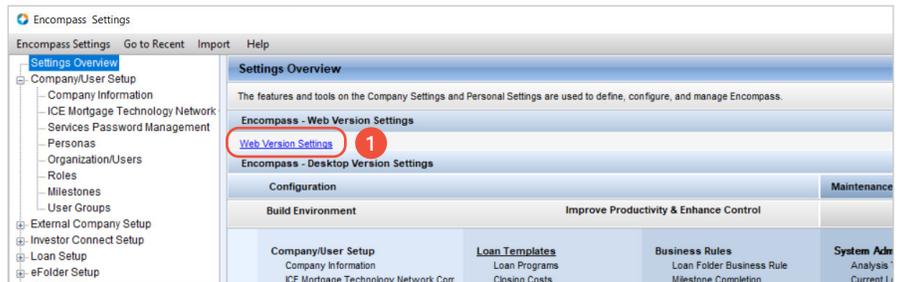
The "R2T" options are specifically for setup in the non-production (UAT) environment and cannot be set up in production.

To set these up in your UAT environment, follow the steps listed here with the R2T functions in the UAT environment.

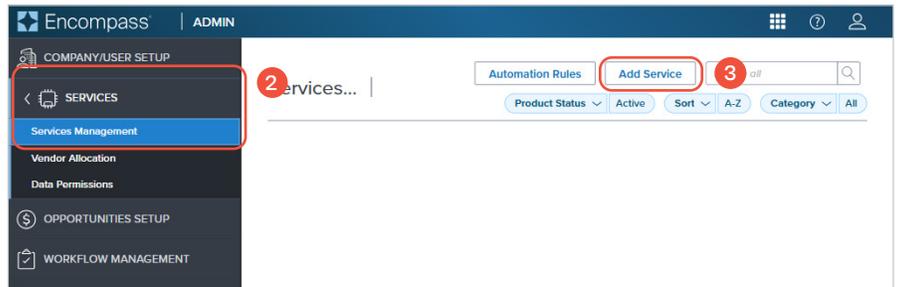
In production, complete the setup for both non-R2T functions in order to quote, import, and order.

Steps to set up the Rate Quote Comparison function:

1. From Smart Client Settings, click **Web Version Settings**.

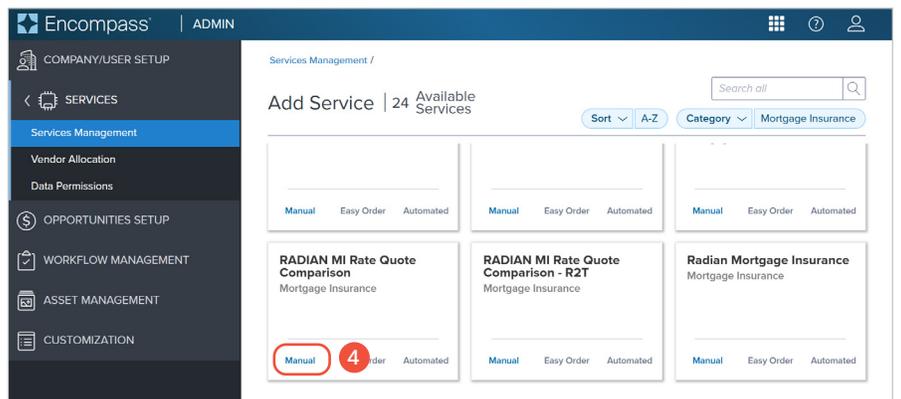


2. In the left navigation menu, click **Services** and then **Services Management**.

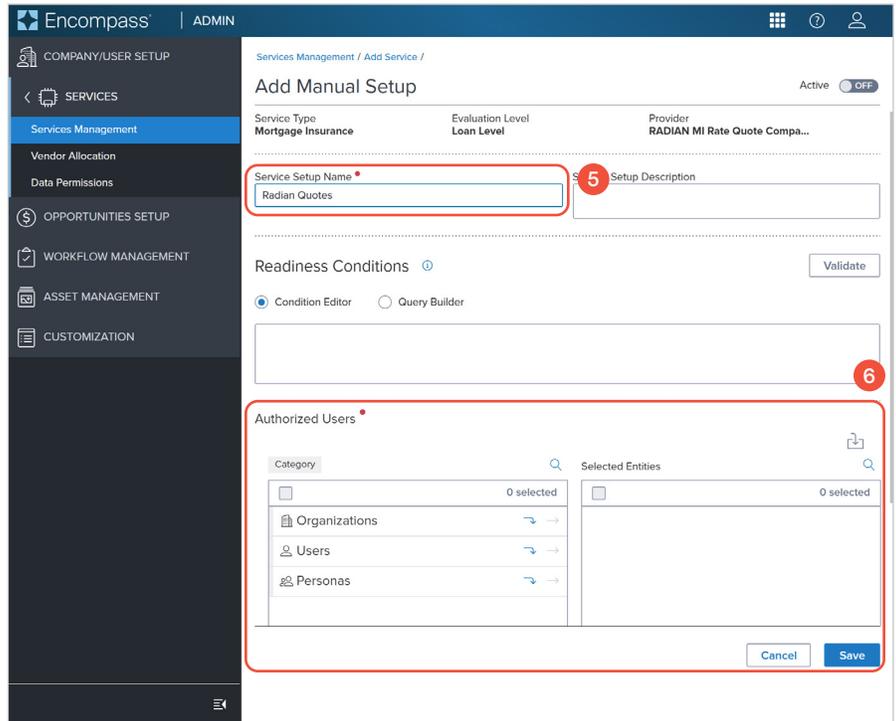


3. Click **Add Service** and select **Mortgage Insurance** from the category dropdown.

4. Click **Manual** on the "RADIAN MI Rate Quote Comparison" function card.



5. Enter the **Service Setup Name** (i.e. “Radian Quotes”).

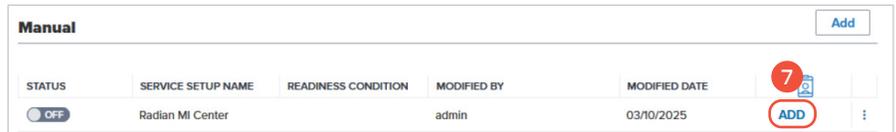


6. In the **Authorized Users** section, select the users (or personas) that should have access to the MI Center and click **Save**.

⚠ Do not use this authorization to restrict persona or user access to certain MI functions.

ℹ If a persona or user will need to access MI Center, they should be authorized here. For persona-based functionality restrictions, please see [Encompass & Persona Settings](#).

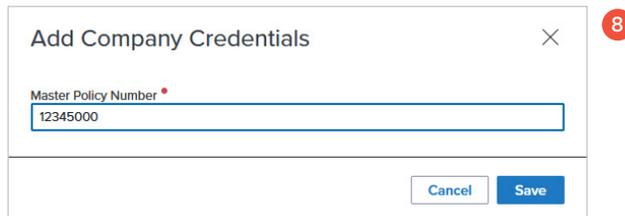
7. In the Service Setup screen, click the **ADD** link to enter your Radian credentials (Master Policy (MP) Number).



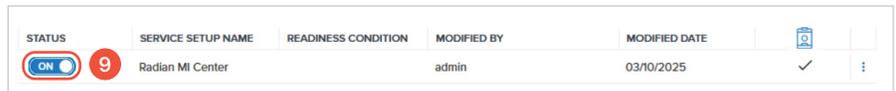
8. Enter your 8-digit Radian MP number in the **Master Policy Number** field and click **Save**.

ℹ The MP number must be formatted as shown with 8-digits and no dashes or spaces.

ℹ Only one master policy number can be set up to run the Rate Quote Comparison.

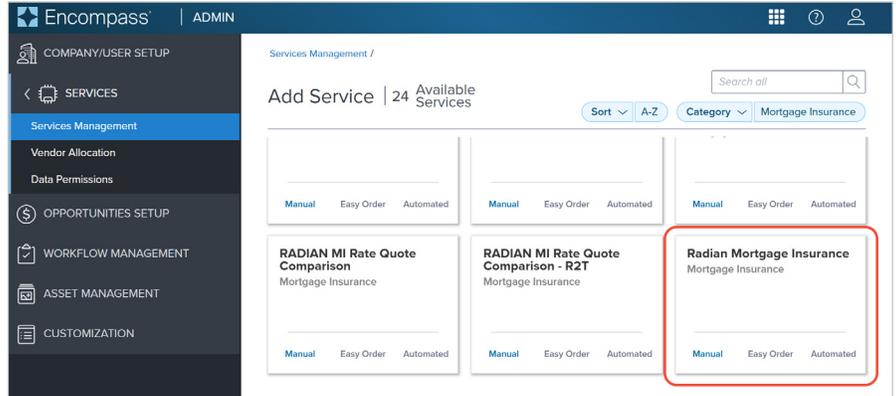


9. Click the Status toggle from **OFF** to **ON**.



Steps to set up the Radian MI function:

Repeat steps 4–9 for the Radian Mortgage Insurance function.

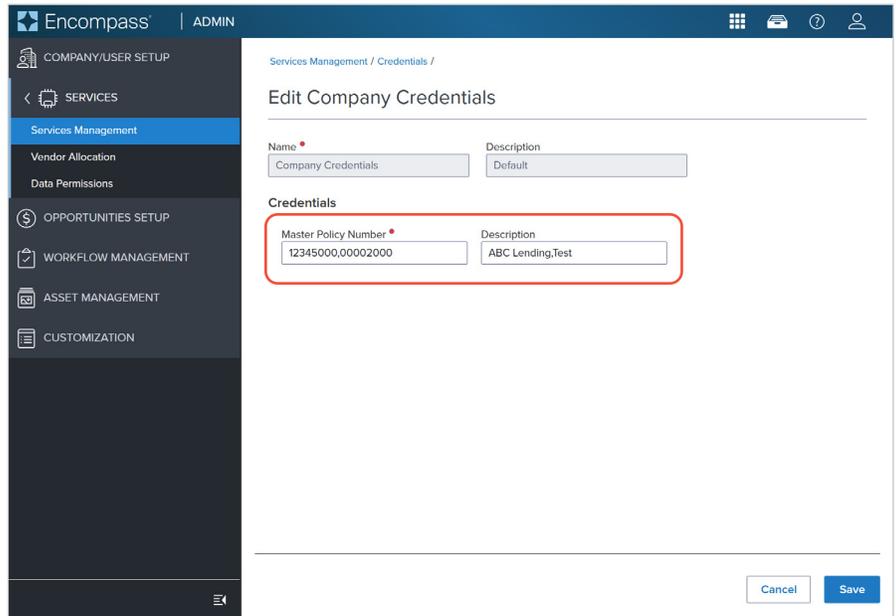


Using Multiple Master Policy Numbers

The Radian order page can support multiple master policy numbers.

To set up more than one **Master Policy Number** for users to pick on the Radian order screen, enter the master policy numbers (as formatted above) separated by commas (no spaces).

In the **Description** field, enter the company names associated with each MP, also separated by commas with no spaces.



This will populate a drop-down in the order screen where users can pick the MP through which to send the request (quotes and orders).



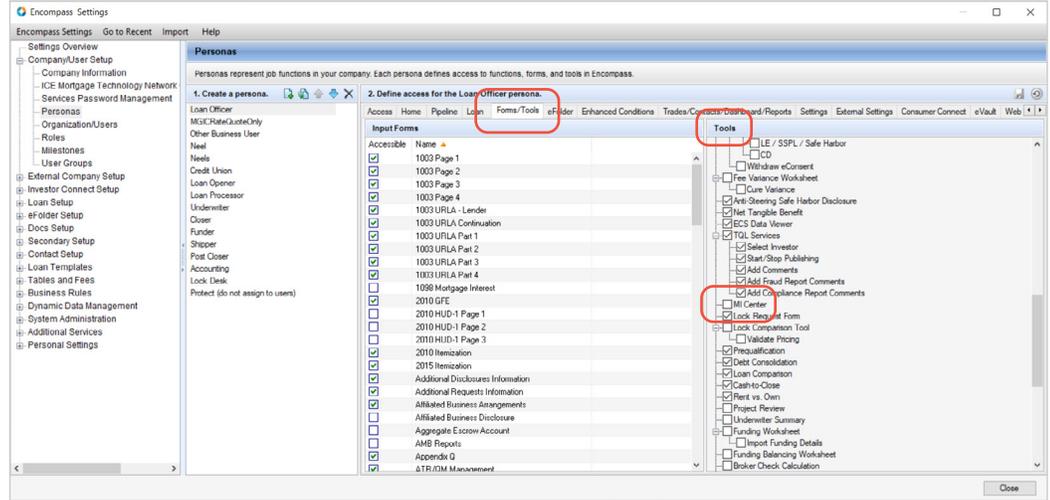
Encompass & Persona Settings

Encompass settings allow the admin to enable the MI Center in the Tools menu, as well as restrict or enable specific MI functions by persona.

Settings to review:

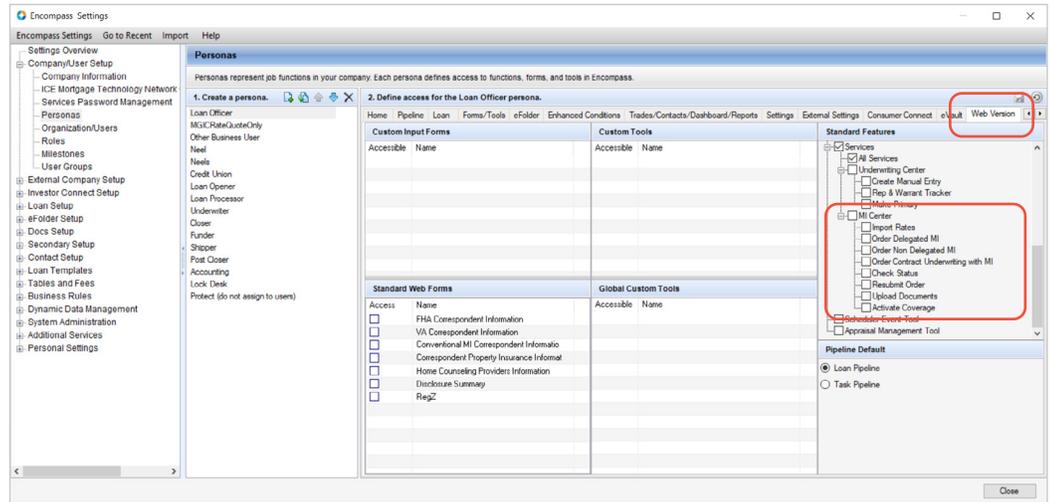
- From **Personas**, click the **Forms/Tools** tab to enable or disable the MI Center option in the **Tools** section.

i This selection adds or removes the MI Center from each persona's Tools Menu



- From **Personas**, click the **Web Version** tab to enable or disable the MI Center and various MI Functions.

i Use these selections to restrict access to any MI functions (i.e. for users restricted to MI quoting, select MI Center and Import Rates Only)

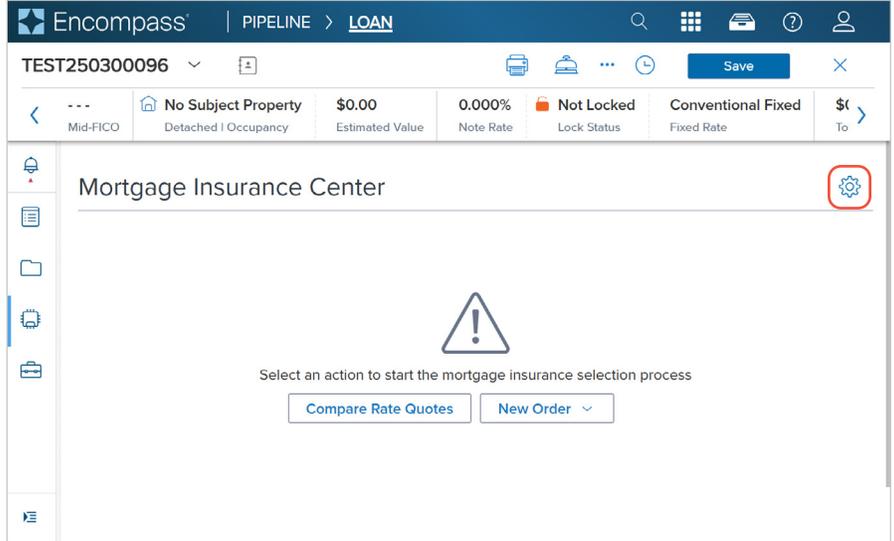


MI Center Rate Quote Comparison Settings

The new Rate Quote Comparison function allows users to compare MI quotes across all configured providers for 4 MI products:

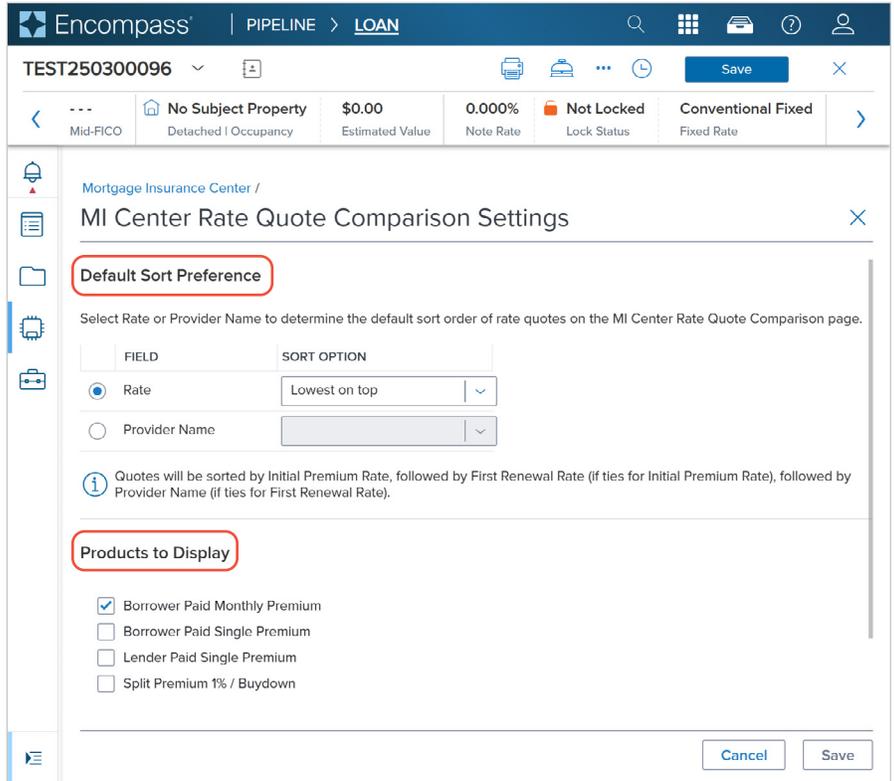
- Monthly
- BP Single
- LP Single
- Split Premium

From the MI Center landing page, click the gear icon to view the Rate Quote Comparison settings.



Admins can select:

- How to sort the results (defaults to lowest price)
- Which products to display to users

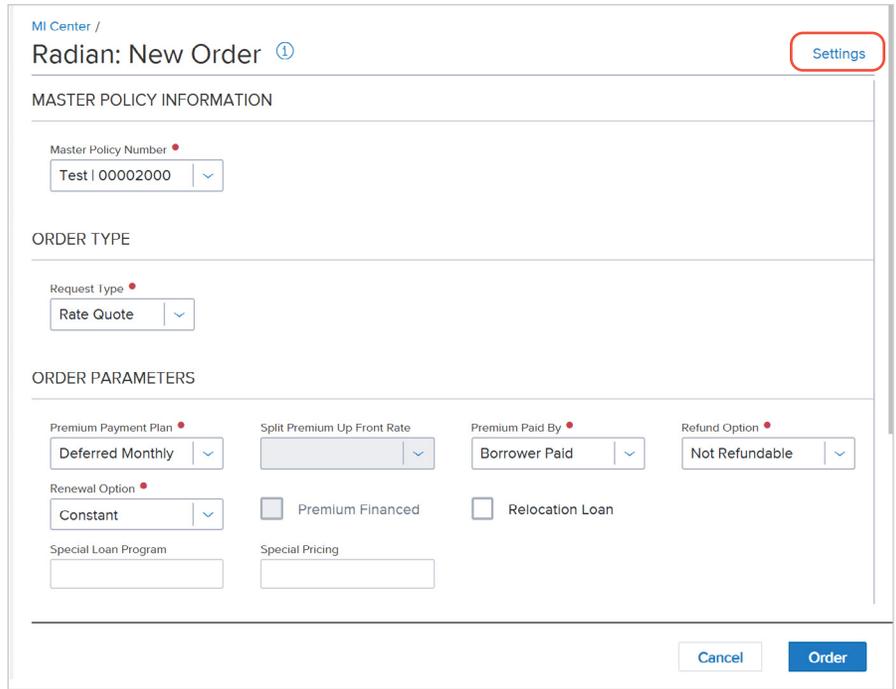
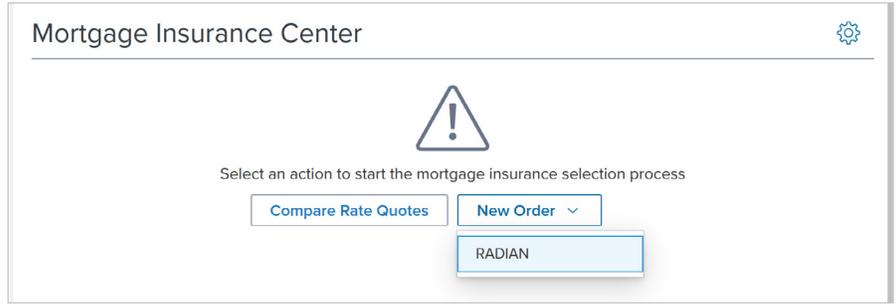


MI Provider-Specific Settings

Each MI provider has an order page, accessed through the **New Order** drop-down.

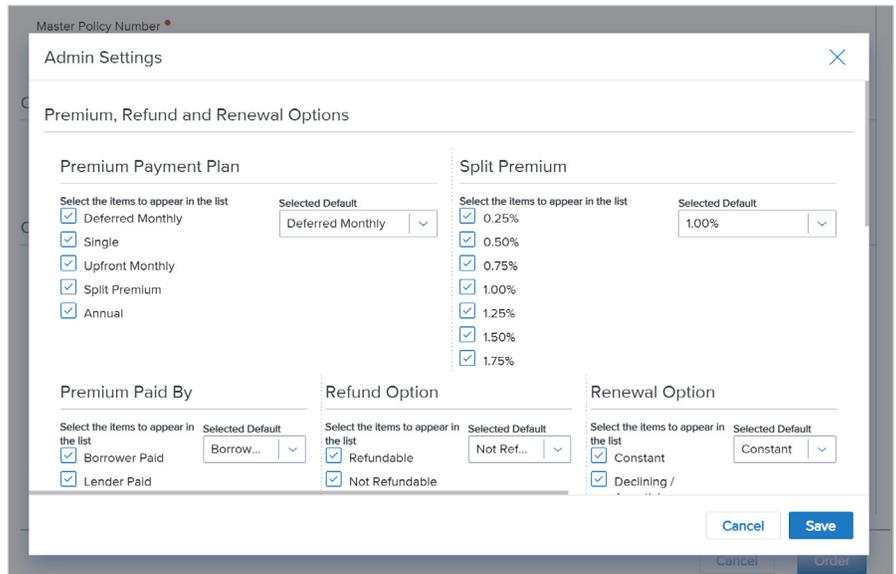
Settings on each provider page apply only to that MI Provider's orders.

Click the **Settings** link in the top right of the order page to view and edit the provider page settings.



Settings to review:

1. Order options to display – toggle product options on or off to display or hide from users.
2. Order field defaults – select or change defaults – Radian order page defaults to Borrower Paid Deferred Monthly Constant Not Refundable.



3. Persona-based settings - these settings will apply only to Radian orders and should only be used if your company has different persona rules between MI providers

i For persona settings and restrictions across all MI providers, use the [Encompass & Persona Settings](#)

Master Policy Number

Admin Settings

Persona Ordering Permissions

Apply Persona Permissions? OFF

PERSONA	<input checked="" type="checkbox"/> RATE QUOTE	<input checked="" type="checkbox"/> DELEGATED	<input checked="" type="checkbox"/> NON DELEGATED
Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Closer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Funder	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Loan Officer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

MI Coverage Percentage

Fannie Mae Freddie Mac

Cancel Save

4. Coverage defaults – hover over a coverage amount and click the edit icon to change (table is defaulted to industry standard coverages)

i To change coverage defaults for all MI orders, these edits must be done on each provider page's settings.

Master Policy Number

Admin Settings

Lock Desk/Secondary

Post Closer

Underwriter

MI Coverage Percentage

Fannie Mae Freddie Mac

BASE LTV	FNMA STANDARD COVERAGE		FHLMC STANDARD COVERAGE	
	TERM > 20 YEARS OR ARM	TERM <= 20 YEARS	TERM > 20 YEARS OR ARM	TERM <= 20 YEARS
95.01% - 97.00%	35	35		
90.01% - 95.00%	30	25	30	25
85.01% - 90.00%	25	12	25	12
85.00% & Under	12	6	12	6

Cancel Save

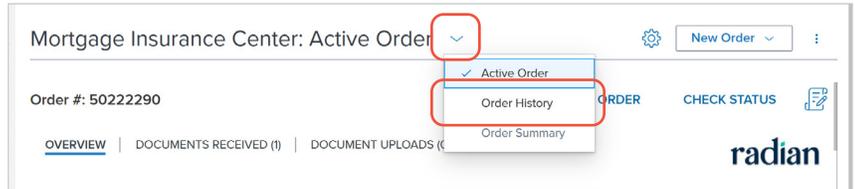
Troubleshooting

Users may encounter any number of errors in their processes, from failed quote requests to failed activation attempts. Most troubleshooting includes looking at the history of interactions on the file.

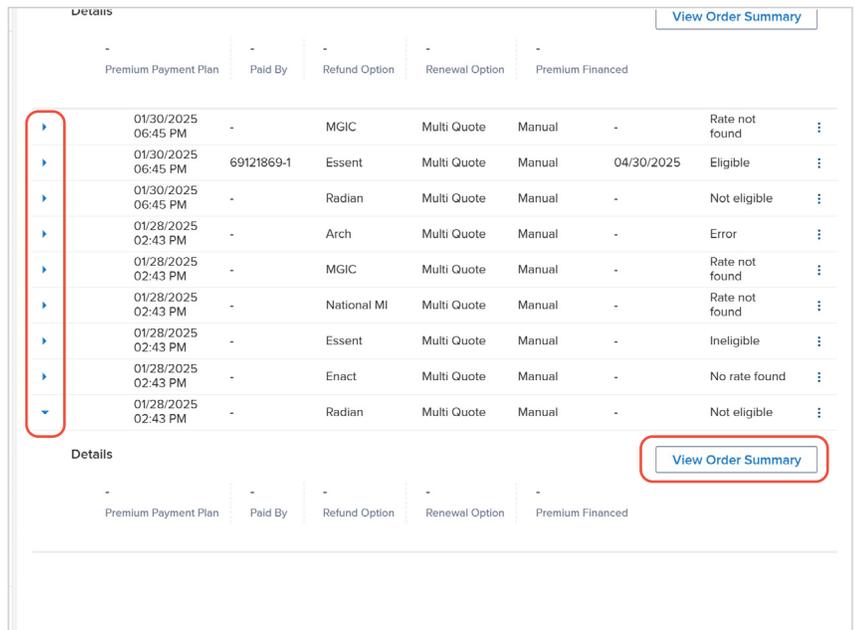
MI Center has 2 primary locations for this information: Order History and the Event Log.

Order History

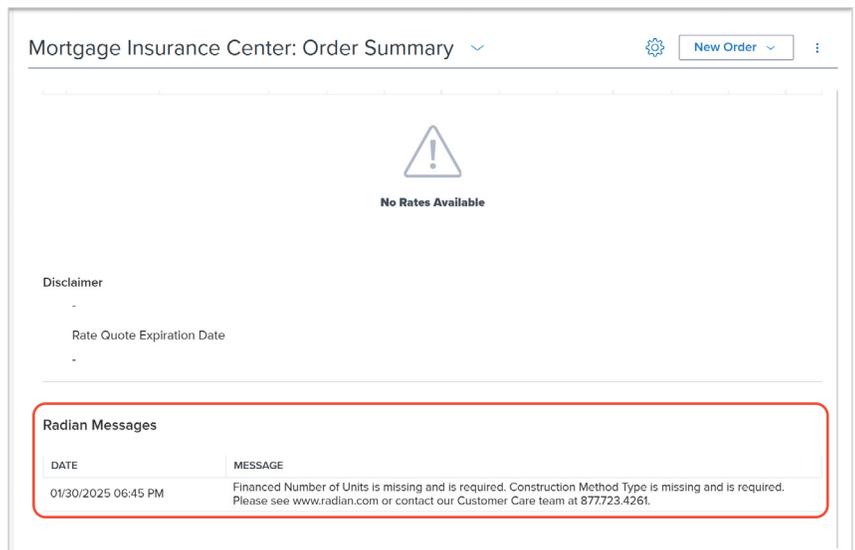
Click the dropdown arrow from the Active Order screen and select **Order History** to view the list of transactions attempted on the file.



To view the details of an individual order, including any error messages received, click the arrow to expand and View Order Summary.



Messages received display at the bottom of the page.



Event Log

This function logs all requests and responses on orders with relevant details for IT support, if necessary.

From the Active Order screen, click the Order Event Log icon.

A list of all transactions and statuses, outgoing and incoming, displays with date/time stamps.

Type	Provider	Order Date	Order Request Method
Non Delegated	Radian	01/31/2025 02:07 PM	Manual

Premium Payment Plan	Paid By	Refund Option	Renewal Option
Deferred Monthly	Borrower	Not Refundable	Constant

Percent %	Amount	Duration
Initial Premium at Closing	-	-
First Renewal	-	-
Second Renewal	-	-

Date-Time	Activity By
01/31/2025 02:07:47 PM	admin

Date-Time	Activity By
01/31/2025 02:07:45 PM	admin

Additional Resources

EPC Support Materials

[Radian.com/EPC](#)

To find additional resources, visit the EPC support materials section of our [Technology Partners](#) page.

Radian Guaranty Account Manager

[Find Your Radian Guaranty Account Manager](#)

If you have any questions, don't hesitate to reach out to your Radian Guaranty Account Manager.

Radian Guaranty Corporate Website

[Radian.com](#)

The Radian Guaranty corporate website has guidelines and information on our products and services.

The corporate website offers:

- [Radian Master Policy](#)
- [MI Rate Finder](#)
- [MI Product Info](#)
- [Underwriting Guidelines](#)
- [Servicer Guides](#)
- [Notification of Mortgage Insurance Modification Form](#)
- [Find Your Radian Account Manager-Sales Rep Finder](#)

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- [MI Essentials Video Series](#)
- [MI Online Tutorial Videos](#)

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