

# MI Quotes with MORE

Optimal Blue and Genworth Admin Guide



# Admin Set-Up Guide

For assistance in administering your Genworth Mortgage Insurance integration with the Optimal Blue system, the following contacts and resources are available. If you have any additional questions, please contact us!

## Genworth Contacts :

### Genworth Action Center

800 444.5664

[Action.Center@Genworth.com](mailto:Action.Center@Genworth.com)

## Optimal Blue Contacts:

Optimal Blue Support 972.781.0200

(Ask for available Account Manager)

Email: [support@optimalblue.com](mailto:support@optimalblue.com)

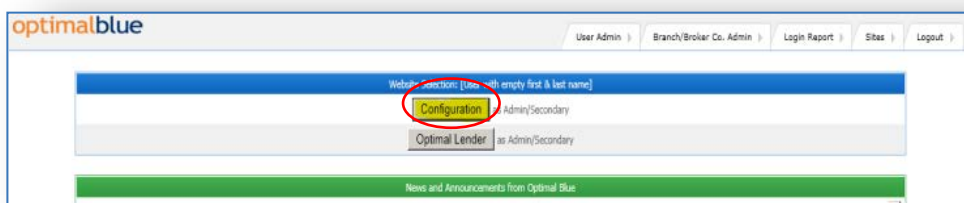
## Genworth PPE Web Page

<http://mortgageinsurance.genworth.com/LenderServices/PPEInfo.aspx>

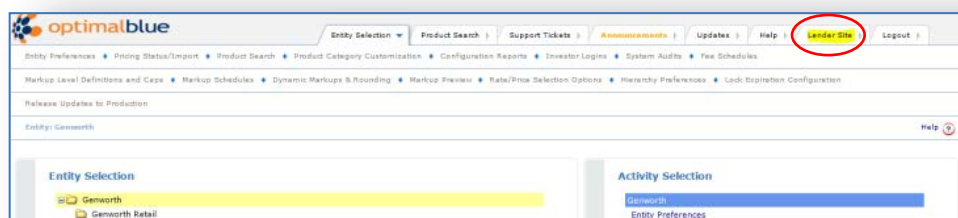
# Admin Set-Up Guide

To reach the MI configuration screen in the Optimal Blue system

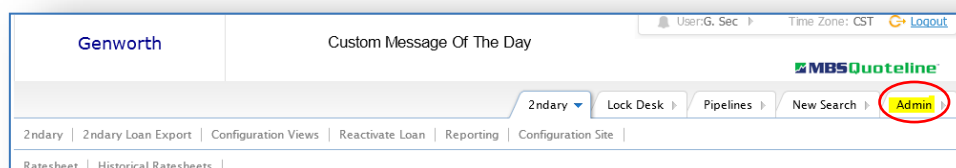
**Step 1: Click Configuration**



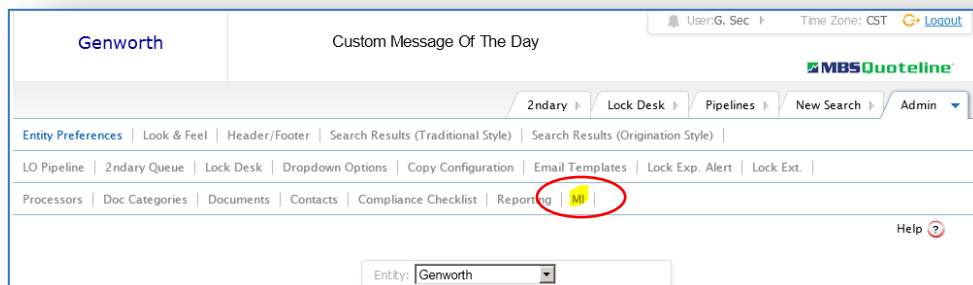
**Step 2: Click Lender Site**



**Step 3: Click Admin**



**Step 4: Click MI**



# Admin Set-Up Guide

## Configure MI Provider entity

1. Click “Yes” to Allow Initial Quotes for Genworth
2. Click “Apply to All Entities”

**OPTIONAL** – To configure more than one entity, choose your additional entities from the dropdown box and follow steps 1 and 2

## Remove an MI Provider from your list

3. Click “No” next to any provider the admin wishes to remove from the list

## Customize your MI Provider list

4. In the Search Results Screen Order drop down box,
  - Click on Genworth
  - Click “Up” to move Genworth to the top of the MI provider list

5. Click “Apply to All Entities”

**\*\* To Save All Changes \*\***

6. Click “Update MI Providers Settings”

The screenshot displays the 'Configure available MI Providers by Entity' interface. At the top, a breadcrumb trail shows 'Providers' > 'Set Up Locations' > 'Assign Entity Locations' > 'Permissions'. Below this is an 'Entity:' dropdown menu set to 'Genworth'. The main table has three columns: 'Preferences', 'Value', and 'Apply to All Entities?'. The table contains several rows for different providers, each with 'Yes' and 'No' radio buttons and an 'Apply to All Entities?' checkbox. A red bracket labeled '3' groups the 'No' radio buttons for 'Radian' and 'Essent'. A red box labeled '1' highlights the 'Yes' radio button for 'Genworth'. A red box labeled '2' highlights the 'Apply to All Entities?' checkbox for 'Genworth'. Below the table is a 'Search Results Screen Order' dropdown menu with 'Genworth' selected. A red box labeled '4' highlights 'Genworth' in the dropdown. A red box labeled '5' highlights the 'Apply to All Entities?' checkbox for 'Search Results Screen Order'. A red box labeled '6' highlights the 'Update MI Provider Settings' button at the bottom.

Preferences	Value	Apply to All Entities?
Allow Estimates for United Guaranty	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Allow Detail Quotes for United Guaranty	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Allow Initial Quotes for Radian	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Allow Initial Quotes for Essent	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Allow Initial Quotes for MGIC	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Allow Initial Quotes for Genworth	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Search Results Screen Order	Genworth United Guaranty Radian Essent	<input type="checkbox"/>

# Admin Set-Up Guide

## Set Up Locations

Click the “Set Up Location” tab

1. Enter location name (Branch name)
2. Enter your Genworth Master Policy # B22222\_ \_ \_ \_

(MP # is 10 digits, if you need to obtain your number, contact your local sales representative or the Genworth ActionCenter at 800-444-5664)

## Optional – Enter State and Institution Type

3. Select State and Institution Type from drop down list

**\*\* To Save Changes \*\***

4. Click “+” to add location and save changes

Providers **Set Up Locations** Assign Entity Locations Permissions

Create New Location(s). Upon ordering MI, the MI companies are required to know the location from where the MI is being ordered. This is not the location of the property.

Location Name	UG Master Policy #	Radian Master Policy #	Essent Master Policy #	MGIC Master Policy #	Genworth Master Policy #	State	Lending Institution Type	Action
1					2	-- None Selected --	-- None Selected --	+

Existing Locations

Location Name	UG Master Policy #	Radian Master Policy #	Essent Master Policy #	MGIC Master Policy #	Genworth Master Policy #	State	Lending Institution Type	Action
Credit Union					B22222RDM	North Carolina (NC)	Credit Union	+
National Rates					B22222VGP	North Carolina (NC)	Mortgage Bank	+

What Location do you want to use by default when a new entity is added to your heirarchy? (You will be able to assign locations to each entity on the Assign Entity Locations screen).

Default Location for New Entities

National Rates Update

3 4

# Admin Set-Up Guide

## Assign Entity Locations

Click “Assign Entity Locations” tab

1. Select the entity that needs to be assigned to the new location from the drop down menu
2. Select the location from the drop down menu
3. Click “Update Assignment” to save changes

The screenshot shows the 'Assign Entity Locations' tab in a web application. At the top, there are navigation tabs: 'Providers', 'Set Up Locations', 'Assign Entity Locations' (circled in red), and 'Permissions'. Below the tabs, there is a form with three main sections:

- Entity Selection:** A dropdown menu labeled 'Entity:' with 'Genworth' selected. A red box with the number '1' is next to it. A dropdown menu is open showing options: 'Genworth', 'Staging (for OB only)', and 'Genworth Retail'.
- Location Selection:** A dropdown menu labeled 'Select the location to be used for MI Estimates/Initial Quotes.' with 'National' selected. A red box with the number '2' is next to it. A dropdown menu is open showing options: 'National' and 'CU'. There is also a checkbox labeled 'Apply to All Entities?'.
- Assignment Summary:** A section titled 'Assign MI Locations by Entity. Assigning locations by entity will allow users to select the appropriate location prior to submitting for a Detailed Quote. This is currently available with UG only.' It contains two columns: 'Locations Not Used by Genworth' (containing 'CU') and 'Locations Used by Genworth' (containing 'National'). Between the columns are '>>' and '<<' buttons. A yellow 'Update Assignment' button is on the right, with a red box and the number '3' next to it.