

# MERS® System Membership integration guide

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Once MERSCORP Holdings, Inc. receives your organization's membership application and all required supporting documentation, your designated internal Integration Resource will receive an email from MERSCORP Holdings, Inc. that includes your assigned Org ID and instructions on how to initiate your MERS System Integration with a Phase I call.

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## PHASE I

During this call, you and your assigned Integration Resource will:

- Discuss the core concepts of MERS and the MERS System.
  - Review your submitted membership application and determine eligibility for membership approval.
  - Identify the tools and resources your organization has in place that will be used to carry out key MERS System procedures.
  - Review any applicable fees, including annual membership fees and MERS System registration fees.
  - Provide a general overview of the second phase of MERS System Integration ("Phase II").
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## PHASE II

Phase II consists of the following steps:

**1. Integration call/course:** depending on your Membership Type, this will be a call or course that will provide you instructions to complete the Procedures Questionnaire and any applicable Integration deliverables.

- **MERS System procedures questionnaire:** used to develop your organization's procedures for its use of the MERS System, including who will be responsible for carrying out these procedures in your organization and identifying your MERS System profile settings.
- **Sample MIN:** if applicable to Membership Type, provide a sample MIN to be validated.
- **Documents:** if applicable to Membership type, provide a sample MOM security instrument (e.g., mortgage, deed of trust, security deed). Applicable to applicants that do not have their Investor(s) preparing these documents on their behalf.
- **"Reply all" to test email:** response confirming ability to receive emails and open password-protected attachments from the MERSCORP Holdings, Inc. Help Desk.



- 2. Submit all required deliverables** that were covered during the Phase II Integration call/course for approval.
- 3. Training:** once all integration deliverables are complete, your Integration Resource will provide your organization with instructions to complete the required training courses, which covers MERS System functions available to your organization.
- 4. Complete test transactions:** if applicable to membership type, you will log onto the MERS System Training region to submit test transactions.
- Notify your Integration Resource once you successfully complete your test transactions to receive feedback.
- 5. Production activation:** once any required testing is complete, your Integration Resource will activate your Org ID on the MERS System and you will receive your initial MERS System login credentials.
- Your organization’s system administrator must login to the MERS System to set up user roles, IDs and passwords once you receive these credentials.
- 6. MERS System integration complete:** once your organization completes any required testing, you will receive confirmation that your integration is complete.
- If you need assistance after completing your MERS System Integration, our Help Desk is available Mon-Fri 8 a.m. – 10 p.m. Eastern Time by calling (888) 680-6377 or by email at [helpdesk@mersinc.org](mailto:helpdesk@mersinc.org).
  - All new Members may be required to complete a Post-Activation Compliance Review 6 months after activation.