eJackets – Process in Settlor

Learn how to generate an eJacket using the AgentNet® Integration.

NOTE: There must be an address for any party on the transaction. Settlor will prompt for missing information if needed.

Request a Policy Jacket

After a title commitment is created, to generate the policy jacket document for a policy in your Settlor file:

1. Click the file number on the Settlor dashboard
2. Click **Title Policies**

3. Click **Create Policy From Commitment**

4. Click **Save**

NOTE: Settlor copies the requirements, exceptions, and other information into the policy as needed.

5. Select the policy in the file's left pane

6. Scroll down to **Schedule A** and confirm expected information is displayed

NOTE: If necessary, click ✏️ to enter the Policy **Effective Date** and **Effective Time** and click **Save Changes**. If you try to request a Jacket without this information, Settlor will display an error message.

7. Scroll to the top of the policy information and click **Request Jacket**

8. Confirm policy information in the **Request Policy Jacket** window
NOTE: Loan Number will not display on an Owner's policy. **Endorsements** display for Short Form policies.

9. Click **Submit**

NOTE: A message displays when AgentNet confirms the Jacket request.

Settlor updates and you can now click **Cancel Jacket** if needed.

To find the Settlor and Underwriter (First American) **Policy Numbers**, click **Edit Product** and view them in the **Product Form** window.

Click **Preview Policy** to see Settlor and First American data reflected in the policy.

Request eJackets for each policy individually; there is no option to request eJackets for all policies at once.