



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**

The screenshot shows the Settlor dashboard for Danielle's Dashboard. On the left, there's a 'Virtual Standup' section with a 'New Sticky Note' button and a 'Notes' section. The main area shows a list of menu items. 'Title Policies' is highlighted with a red circle and a red '2' next to it. Other menu items include Order Admin, Dashboard, Payments, Account Overview, Wires In Queue, A/R Activity, Closing Setup (Security First Kansas 2022 Contract), Parties, Transactions, Receipts, Disbursements, Satisfy Requirements / Update Taxes, Confirmation, HOA Orders and Payments, Scheduler, Water/Sewer Dashboard, Credits and Commissions, Title Commitment, Title Policies, Policy Indemnities, Documents, and E-Recording.

3. Click **Create Policy From Commitment**

The screenshot shows the Settlor Policy Dashboard for a specific file. At the top, there's a header with the Settlor logo and navigation links. Below the header, there's a section titled 'Policy Dashboard' with the address '4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029)'. Below this, there's a row of buttons: 'Place Order Hold', 'Cancel Order', 'Enable Overlimit', 'Invoice Products', 'Edit Policy Exceptions', 'New Owners Product', 'New Loan Product', and 'Post Re'. The 'Create Policy from Commitment' button is highlighted with a red box.

4. Click **Save**

The screenshot shows the 'Lender Policy Pre Process' form. It has a header 'Lender Test for \$1765.00'. Below the header, there's a form with fields for 'Contact', 'Company', 'MERS' (with a checkbox), and 'Clause Type' (with a dropdown menu). At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box.

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

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

The screenshot shows the Settlor Policy Dashboard for policy 4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029). The left sidebar contains a list of items: Order Details, Services, Documents, Requirements, "ALTA" Owner's Policy (highlighted with a red box), and Distribution. The main area shows a list of actions: Place Order Hold, Cancel Order, Enable Overlimit, Invoice Products, Edit Policy Exceptions, New Owners Product, and New Loan Product. Below this, a section for the selected policy shows a list of actions: Exceptions, Request Jacket, Deliver, Create New Commitment, Preview Policy, Copy Product, Copy from Background, and Place Hold.

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

The screenshot shows the Settlor Policy Dashboard for policy 4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029). The left sidebar contains a list of items: Order Details, Services, Documents, Requirements, "ALTA" Owner's Policy, Distribution, Product, Schedule-A (highlighted in blue), Default, and A. The main area shows a list of actions: Place Order Hold, Cancel Order, Enable Overlimit, and Invoice Products. Below this, a section for the selected policy shows a list of actions: Exceptions, Request Jacket, Deliver, Create New Commitment, Preview Policy, Copy Product, Copy from Background, and Place Hold. The 'Schedule A' section is highlighted in blue and shows the following information: Property Address (4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523, Sedgwick County), 1. Policy Date (with a red box around the date field), and a list of actions: Exceptions, Request Jacket, Deliver, Create New Commitment, Preview Policy, Copy Product, Copy from Background, and Place Hold.

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.

The screenshot shows the Policy Date form. It has two main sections: Effective Date and Effective Time. The Effective Date section has a text input field with the placeholder text "The effective date of this policy." The Effective Time section has a text input field with the placeholder text "The effective time of this policy. Can be free typed."

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

The screenshot shows the Settlor Policy Dashboard for policy 06-17-06 FA068000026.1629 (FA - First American). The left sidebar contains a list of items: Order Details, Services, Documents, Requirements, "ALTA" Owner's Policy, Distribution, Product, Schedule-A, Default, and A. The main area shows a list of actions: Place Order Hold, Cancel Order, Enable Overlimit, and Invoice Products. Below this, a section for the selected policy shows a list of actions: Exceptions, Request Jacket (highlighted in red), Deliver, Create New Commitment, Preview Policy, Copy Product, Copy from Background, and Place Hold.

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**

Request Policy Jacket

Our Information

Product: AO6 Premium: \$1,955.00 Proposed Insured: Bob Buyer

Additional Information

Loan Number: Policy Amount: 500000.00 Date of Policy: 07/03/2023

☐ Include Agent Address

Endorsements

Close

Submit

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

Request Policy Jacket

Our Info

Successfully requested policy jacket. Please Wait..

Additional Information

Loan Number:

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

First "ALTA" Owner's Policy FA068000029.1852 (FA - First American)

Exceptions

Cancel Jacket

Deliver

Create New Commitment

Preview Policy

Copy Product

Copy from Background

Place Hold

Distribution

Bob Buyer (Buyer/Borrower - Primary) - Proposed Insured

+ New Delivery

(Commitment Address) Buyer/Borrower

Bob Buyer
12345 main
Denver, CO 80210
Via: Electronic Mail
Blind Copy

(Policy Address) Buyer/Borrower

Bob Buyer
12345 main
Denver, CO 80210
Via: Electronic Mail
Blind Copy

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


Product Form	
Position:	Policy Number:
First	FA068000026.1629
Product:	In Lieu of Policy:
AO6 "ALTA" Owner's Policy 06-17-06	The previous policy number this
Additional Reference:	Underwriter Policy Number:
Additional information appended to the reference line.	5011400-3567647e

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

First "ALTA" Owner's Policy 06-17-06 FA068000026.1629 (FA - First American)

Exceptions **Cancel Jacket** **Deliver** Create New Commitment **Preview Policy** Copy Product

Distribution




Christine's Dashboard
8000026 ▾
Admin ▾
Apps ▾
Queues ▾
Accounting ▾
EA ▾
A/R ▾
Financial ▾
HOA ▾
Disbursing ▾

Documents

4567 FIRST AMERICAN TEST FILE DRIVE, WICHITA, KS 67230 (SU8000026)

- First American Homeowner Policy - 2021

TRANSACTION GIVING RISE TO THIS POLICY, MUST BE BROUGHT IN AN INDIVIDUAL CAPACITY. NO PARTY MAY SERVE AS PLAINTIFF, CLASS MEMBER, OR PARTICIPANT IN ANY CLASS, REPRESENTATIVE, OR PRIVATE ATTORNEY GENERAL PROCEEDING.



First American Title™

Homeowner's Policy of Title Insurance

SCHEDULE A

Name and Address of Title Insurance Company: First American 1111 First American St, Denver, CO 80205

Policy Number: 5011400-3567647c

Amount of Insurance: \$500,000.00

Premium: \$1,955.00

Date of Policy: May 23, 2023 at 10am

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