
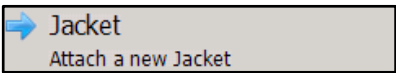




Job Aid: eJackets & Short Form Loan Policy w/eSignature Option in SoftPro®

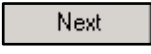
This document shows you how to generate eJackets and a Short Form Loan Policy with eSignature directly from your SoftPro® file, using the AgentNet® Integration. Using the ProForm order's fee information, this Jacket product will allow you to simultaneously create Jackets and prepare an order for remittance without leaving the integration.

Create a Policy Jacket

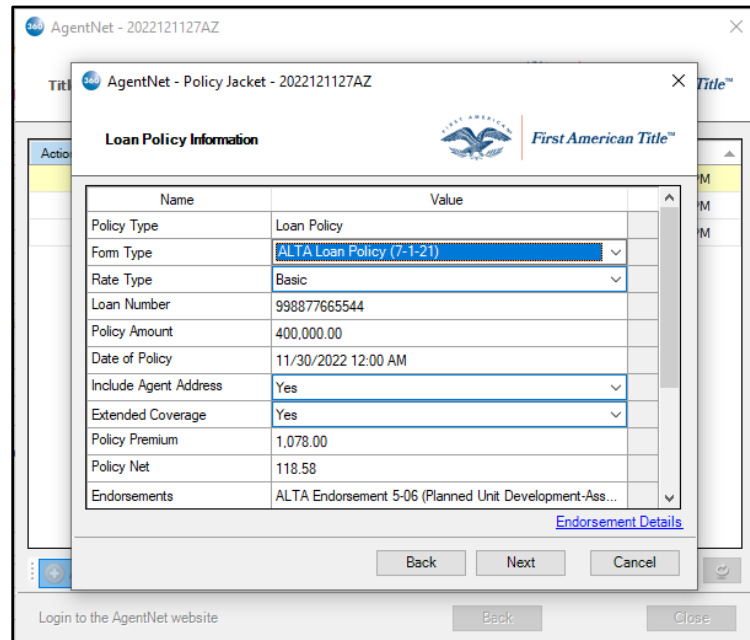
1. Click  in the **Title Services** window
2. Click 
3. Select the **Jackets** to be issued in the **Add/Select Policies** window

Include	Jackets
<input checked="" type="checkbox"/>	Loan
<input checked="" type="checkbox"/>	Owner
<input type="checkbox"/>	Guarantee

NOTE: Checkmarks display with the **Loan** and **Owner** options by default. Additional policies can be added to the request by clicking the **Add Policy** button. If there are multiple loans, they will be available in the drop-down box under the **Loan** column. To remove a Policy, select the Policy to be removed and click the **Remove Selected Policy** button.

4. Click  to view the **Loan, Owner, or Guarantee Policy Information** screen(s)

The **Policy Information** screen presents options for **Form Type**, **Rate Type**, and other fields necessary for completing the Jacket request. Policy Premiums, Endorsement Descriptions, Endorsement Premiums and Transaction/Statistical Codes (where applicable) are mapped from ProForm.



Name	Value
Policy Type	Loan Policy
Form Type	ALTA Loan Policy (7-1-21)
Rate Type	Basic
Loan Number	998877665544
Policy Amount	400,000.00
Date of Policy	11/30/2022 12:00 AM
Include Agent Address	Yes
Extended Coverage	Yes
Policy Premium	1,078.00
Policy Net	118.58
Endorsements	ALTA Endorsement 5-06 (Planned Unit Development-Ass...)

[Endorsement Details](#)

Back Next Cancel

Login to the AgentNet website Back Close



NOTE: To view or modify the itemized Endorsement Premiums, click the **Endorsement Details** hyperlink and then click **Close**.

5. Click **Next** or **Submit** to continue

NOTE: Depending on the Property State, an **Additional Questions** screen and/or an **Additional Title Charges** screen may appear for displaying CPL fees and other information. Non-CPL Fee states will not present an **Additional Questions** or **Additional Title Charges** screen, and the **Submit** button would be located on the **Policy Information** screen.

The Jackets will be returned in the **Review Policies** screen, and all fee information will have been submitted to AgentNet to prepare the file for remittance. The **Review Policies** screen displays the document(s) and policy number(s).

6. Click **Accept** to import the document(s) and policy number(s) into ProForm

The screenshot shows the 'Review Policies' window in AgentNet. It contains two main sections: 'Policy Numbers' and 'Documents'.

Policy Numbers:

Name	Current Value	New Value
Loan Policy		50150021-0001161e
Owner Policy		50193821-0001006e

Documents:

View	Copy	Document Name	File Name	File Size	Transferred
<input checked="" type="checkbox"/>		LP-54295834_	LP-54295834_.pdf	191.91 KB	100%
<input checked="" type="checkbox"/>		OP-54295835_	OP-54295835_.pdf	194.56 KB	100%

At the bottom, there is an 'Accept' button (highlighted with a green circle) and a 'Close' button.

NOTE: The document(s) will be available in the **Attachments** screen, and the policy number(s) will be available in the **Policy - Schedule A** and **Title Insurance Premiums** screens.



Send Updated Rates to AgentNet

The **Update Rates** tool on the **Title Services** screen gives a user the ability to send updated fee information from ProForm to AgentNet for previously created Jackets. This tool will capture from ProForm the updated Gross and Net Policy Premiums, changes to Endorsement data (Gross and Net adjustments, the addition or removal of Endorsements), and Policy or Endorsement Transaction Code changes (where applicable).

NOTE: If any changes are needed for the Policy's Coverage Amount, the Jacket transaction will need to be Voided and re-issued.

1. Make the appropriate fee changes in ProForm
2. In the **Title Services** screen, click **Update Rates**

AgentNet - 2022121140FL

Title Services

☐ Remit ☐ Queue

Action	Product	Type	Insured	Amount	Status	Created On
	Closing Protection Letter	Standard	New Loan Le...	400,000	Completed	12/6/2022 11:14 AM
	Closing Protection Letter	Standard	Buyer One; B...	400,000	Completed	12/6/2022 11:14 AM
	Jacket	Loan	New Loan Le...	400,000	Completed	12/6/2022 11:16 AM
	Jacket	Owner	Buyer One an...	500,000	Completed	12/6/2022 11:17 AM

[Add Product](#)
[Cancel](#)
[Update CPL](#)
[Update Rates](#)
[AgentNet File Information](#)

[Login to the AgentNet website](#)
[Back](#)
[Close](#)

NOTE: For the Jacket that is selected in the upper grid, the related endorsement data and fee details will display in the lower grid. The Gross and Net Premium values will populate from the ProForm order.

AgentNet - 2022121140FL

Update Rates - Fee Details

Type	Insured	Amount	Gross Premium	Net Premium
Loan	New Loan Lender/SAOA/ATIMA	400,000.00	225.00	24.75
Owners	Buyer One and Buyer Two	500,000.00	2,575.00	84.98

Name	Gross Premium	Net Premium
ALTA Endorsement 5-06 (Planned Unit Development)	100.00	11.00
ALTA Endorsement 8-1-06 (Environmental Protection Lien)	100.00	11.00
ALTA Endorsement 9-06 (Restrictions, Encroachments, Minerals)	100.00	11.00
	525.00	57.75

[Add Product](#)
[Cancel](#)
[Update CPL](#)
[Update Rates](#)
[AgentNet File Information](#)

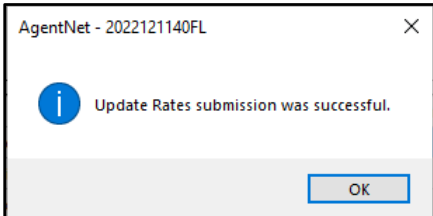
[Login to the AgentNet website](#)
[Back](#)
[Close](#)



First American Title™



- Adjust the Gross and Net Premium values if needed
- Click **Next** or **Submit** to submit the updated fee information to AgentNet
NOTE: Depending on the property state **Additional Questions** or **Additional Title Charges** screens may appear.
- When the Update Rates submission is successful, a confirmation window will display. Click **OK** to be re-directed to the **Title Services** screen



Generate a Short Form Loan Policy with eSignature

- Follow steps **1 through 4** in the **Generate an eJacket** process above
- In the **Loan Jacket Information** section, select a **Policy Signatory** option

NOTE: The **Policy Signatory** dropdown will include the available signatories to add to the jacket, if enabled.

- Click **Next**, and continue with **Step 5** in the Generate an eJacket process above

NOTE: Once the Data has been sent to AgentNet, the Policy Signatory eSignature will appear as follows on the eJacket form:

First American Title Insurance Company

Dennis J. Gilmore

Dennis J. Gilmore
President

Jeffrey S. Robinson

Jeffrey S. Robinson
Secretary

By: *Sam M. Lopez*
Authorized
Countersignature

For Reference:

File #:
Loan #:

Issued By:

ABC Settlement Services
987 Sample Drive, Suite 100
Pittsburgh, PA 15205

This jacket was created electronically and constitutes an original document

First American Title Insurance Company, and the operating divisions thereof, make no express or implied warranty respecting the information presented and assume no responsibility for errors or omissions. First American, the eagle logo, First American Title, AgentNet, FAST, First American Eagle Academy, StreamLine, StreamLine ASP, TARA, and Title Express are registered trademarks or trademarks of First American Financial Corporation and/or its affiliates. This document is for informational purposes only and is not and may not be construed as legal advice. No person or entity may rely upon anything contained herein when making legal and/or other determinations regarding its practices, and such person or entity should consult with an attorney prior to embarking upon any specific course of action.