
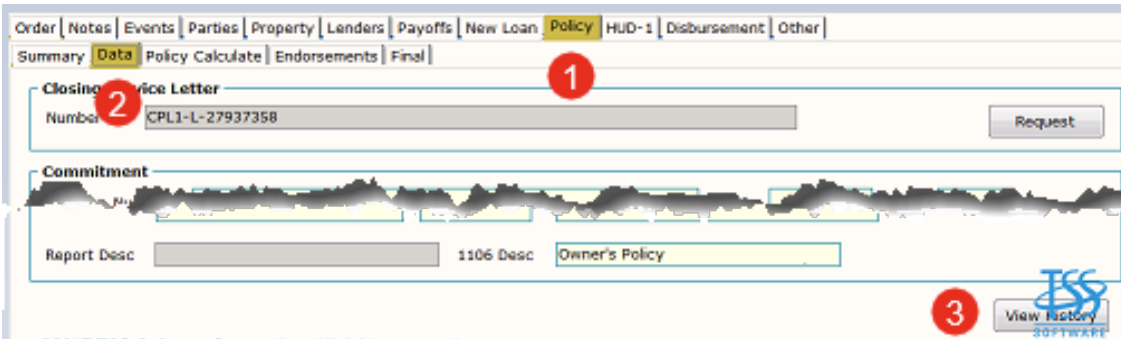




Job Aid: How to Review Underwriter Request History

The purpose of this document is to show how to review the Underwriter Wizard Request History for an Order. This information is useful for reviewing the Order information to determine changes made to the Order that require a new Policy Jacket or as an audit trail for Underwriter Requests.

1. Click 
2. Click 
3. Click 



The screenshot shows the Title Express software interface. At the top, there is a navigation bar with tabs: Order, Notes, Events, Parties, Property, Lenders, Payoffs, New Loan, Policy, HUD-1, Disbursement, and Other. Below this is a sub-navigation bar with tabs: Summary, Data, Policy Calculate, Endorsements, and Final. The 'Policy' tab is selected, and the 'Data' sub-tab is active. In the 'Data' sub-tab, there is a section for 'Closing Service Letter' with a 'Number' field containing 'CPL1-L-27937358' and a 'Request' button. Below this is a 'Commitment' section with a 'Report Desc' field containing '1106 Desc' and a dropdown menu showing 'Owner's Policy'. At the bottom right, there is a 'View History' button. Red circles 1, 2, and 3 highlight the 'Request' button, the 'CPL1-L-27937358' field, and the 'View History' button respectively.

NOTE: The **Underwriter Request History** window opens, displaying the **Title Express** User that made the **Request** and the **SELECTIONS** and **ORDER INFORMATION** at the time of the **Request**.

NOTE: In the **SELECTIONS** section, you can view the following:

- **Title Express** User that made the **Request**
- Date and time a **Request** was made
- **Underwriter** name
- **Policy Type**
- Type of **Request**
- **Agent ID**
- **Agent** and Branch

NOTE: In the **ORDER INFORMATION** section, you can view the following:

- **Settlement Date**
- **Property Address**
- **Property Type**
- **Loan Amount**
- **Sales Price**
- **Loan Number**
- **Lender names and addresses**
- **Seller names and addresses**
- **Buyer names and addresses**

4. Click  to close the **Underwriter Request History** window