Policy Jackets - Request in TitleFusion

Learn how to request a Policy Jacket from your TitleFusion file using the AgentNet® integration.

Access the Integration

1. On the **Application** screen, click the **Underwriter** hyperlink

Select Firm, Office, and Underwriter

1. If applicable, select the **Firm** in the drop-down list
2. If applicable, select the **Office** in the drop-down list
3. If applicable, select the **Underwriter** in the drop-down list

NOTE: If you have previously submitted a request for a product or service for the file, these options will be grayed out.

Select Jacket and Options

1. Under Underwriter Integration, select **Jacket**

2. Select the loan, if applicable
3. Select the property, if applicable
4. Select the appropriate jacket type from the **Product Type** dropdown

NOTES:
- You can select from Lender's or Owner's Jackets.
- You can select one Jacket at a time.

Complete Additional Fields and Request Jacket

1. Enter the **Loan Number**, if applicable
   NOTE: The **Loan Number** will pull from **Application** if entered and is not a required field.

2. Select the **Date of Policy**
   NOTE: Today's date is the default.

3. The **Policy Amount** pulls from the file; adjust if needed
   NOTE: Required fields will vary based on the type of Jacket selected.

4. Click **REQUEST JACKET**

NOTES:

- The jacket opens in the Underwriter Integration area.

- The Jacket is added to the **Documents** screen.

- A line item for the Jacket is added to the grid in the bottom of the Underwriter Integration area.

- The Jacket numbers display on the **Policy Recitals** screen.

Void Jacket

1. Return to the Underwriter Integration page
2. Locate the policy jacket in the products grid at the bottom of the Underwriter Integration screen
3. Click the red **X** to void the policy jacket and move it to the Archive folder in the **Documents** screen

Cancel Entire File

1. Click **CANCEL ENTIRE FILE**

2. Click **OK** in the confirmation window

NOTES:

- A pop-up message confirms the file was deleted

SUCCESS

File Cancelled successfully

- The **Order Status** column in the item grid is updated

Item	Description	Reference	Vendor Order Number	Policy / Cert Number	Order Status	Requested By	Requested	Received	Voided			
Title Search	AgentNet Search Product ordered for 3249 Adams Ct Bensalem PA 19020	Sale w/Mortgage;Residential;AgentNet Search Product;Condominium	5190997		Cancelled	JennFA	2/3/2021 5:23:42 AM		2/3/2021 12:37:00 PM			
Jacket	ALTA Owner Policy (6-17-06)	Owner Policy		24770857	Cancelled	JennFA	2/2/2021 1:46:22 PM	2/2/2021 1:46:22 PM	2/3/2021 12:37:00 PM			
CPL	Standard	LENDER	19963014	19963014	Voided	JennFA	1/27/2021 4:46:00 PM	1/27/2021 4:46:00 PM	1/27/2021 5:22:00 PM			
CPL	Standard	LENDER	19963000	19963000	Cancelled	JennFA	1/27/2021 4:45:05 PM	1/27/2021 4:45:05 PM	2/3/2021 12:37:00 PM			
Back Title	Loan Policy	11/30/2015		50113420198402e	Cancelled	JennFA	1/25/2021 8:00:03 PM	1/25/2021 8:00:03 PM	2/3/2021 12:37:00 PM			

- All documents are voided and moved to the Archived folder on the **Documents** screen

		☐	VOIDED 2/3/2021-ALTA Owner Policy (6-17-06) 5011442-0411464e		Policy	02/02/2021 01:46 PM
		☐	VOID_CPL PA LENDER 19963014		CPL	01/27/2021 04:46 PM
		☐	VOIDED 2/3/2021-CPL PA LENDER 19963000		CPL	01/27/2021 04:45 PM
		☐	VOIDED 2/3/2021-BackTitle via First American Loan Policy		Search Results	01/25/2021 08:00 PM

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☑ Show Archived Documents (4)   Select all Documents   Mark Selected Docs NPI