



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

5 App. Date: 11/18/2020 Priority: Parties: Smith / Holmes Prop: 3277 SAN JOSE BLVD. CL

Tasks & To Do File Manager Application

AT: FL File #: FA 11-18-20 FL P-1 GO APPLICATION FILE

Transaction Information

Underwriter: FA 1 App. Type: Purchase Trans Type:

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

Firm: DEMO - ABC Settlement Services 1

Office: DEMO - ABC Settlement Services/PA/Pittsburgh 2

Underwriter: First American Title Insurance Company 3

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**

Underwriter Integration

The following services are available from this Underwriter

First American Title

Loans: \$110,000.00

Firm: DEMO - ABC Settlement Services

Office: DEMO - ABC Settlement Services/PA/Pittsburgh


Underwriter: First American Title Insurance Company 1

BACK TITLE TITLE SEARCH SDN SEARCH CPL JACKET



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

The following services are available from this Underwriter


First American Title

Firm: DEMO - ABC Settlement Services
 Office: DEMO - ABC Settlement Services/PA/Pittsburgh
 Underwriter: First American Title Insurance Company

Loans: \$110,000.00

Choose Properties:
☒ 151 Main Street Braddock PA 55555

BACK TITLE TITLE SEARCH SDN SEARCH CPL **JACKET**

Product Type:

- Please Select
- ALTA Exp Cov Res (EAGLE) Loan - Current Assessments (5-1-16)
- ALTA Homeowner (EAGLE) Policy (5-1-16)
- ALTA Loan Policy (6-17-06)
- ALTA Owner Policy (6-17-06)
- ALTA Res Limited Cov Mortgage Mod (12-1-14)
- ALTA SF Exp Cov Res (EAGLE) Loan-Current Assessments (5-1-16) Sch B

Item	Description
CPL	Standard

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**

Product Type:

- ALTA Owner Policy (6-17-06)

Additional Fields

Loan Number: Policy Amount: 21,000.00
 Date of Policy:

REQUEST JACKET

**NOTES:**

- The jacket opens in the Underwriter Integration area.

The screenshot shows the 'Underwriter Integration' interface. On the left, there's a sidebar with a menu and a document viewer showing a policy document. The main area displays the 'Owner's Policy of Title Insurance' document. The document includes the First American Title logo, the policy number, and the company name. It also contains a section for 'COVERED RISKS' and a disclaimer about the policy's terms and conditions.

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

Documents	Category	Last Modified	Modified By
ALTA Owner Policy (6-17-06) 5011442-0405752e	Policy	12/22/2020 12:57 PM	JennFA

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

Item	Description	Reference	Vendor Order Number	Policy / Cert Number	Order Status	Requested By	Requested	Received	Voided
Jacket	ALTA Owner Policy (6-17-06)	Owner Policy		23068309	Cancelled	JennFA	12/22/2020 12:57:50 PM	12/22/2020 12:57:50 PM	12/22/2020 1:02:00 PM

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

The screenshot shows the 'Policy Recitals' screen. At the top, there's a header with application details: App. Date: 12/22/2020, Priority: Parties: Buyer / Seller, Prop: 151 Main Street Borough of Braddock Allegheny, Type: Purchase Standard, Closing: 12/23/2020. Below the header, there's a navigation bar with tabs: Tasks & To Do, File Manager, Application, Documents, Commitment, Charges & Fees, and Policy. The 'Policy' tab is selected. The main area shows the 'RECORDINGS' tab, which displays the policy number (5011442-0405752e) and the recorded date (12/22/2020). There are also sections for 'Mortgage Policy' and 'Add. Mortgage Policy' with their respective numbers and recorded dates.

Void Jacket

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

Item	Description	Reference	Vendor Order Number	Policy / Cert Number	Order Status	Requested By	Requested	Received	Voided
Jacket	ALTA Owner Policy (6-17-06)	Owner Policy		24770857	Completed	JennFA	2/2/2021 1:46:22 PM	2/2/2021 1:46:22 PM	




Cancel Entire File

1. Click CANCEL ENTIRE FILE

Item	Description	Reference
Title Search	AgentNet Search Product ordered for 3249 Adams Ct Bensalem PA 19020	Sale w/Mortgage;Residential;AgentNet Search Product;Condominium
Jacket	ALTA Owner Policy (6-17-06)	Owner Policy
CPL	Standard	LENDER
CPL	Standard	LENDER
Back Title	Loan Policy	11/30/2015

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 CANCEL ENTIRE FILE


2. Click OK in the confirmation window

An embedded page at servicesgateway.titledesktop.com says

This will void ALL CPL and Jacket requests for this file! Continue?

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

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

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<input checked="" type="checkbox"/> Show Archived Documents (4)	Select all Documents	Mark Selected Docs NPI
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