Policy Jackets – Generate in Titlesoft®

Learn how to request and void Owner's and Loan Policy Jackets electronically, using the Titlesoft® integration with AgentNet®.

Enable Integration Service

1. Starting from System setup, navigate to **Global Settings**

2. Click **Underwriters** in the left navigation tree

3. In the Underwriters window, select **FIRST AMERICAN TITLE**

4. At the bottom of the screen, click

   ☑ Web Services CPL and Jackets
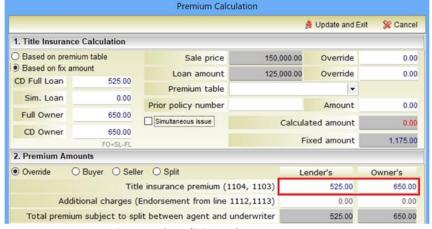
   NOTE: Available in Build 512

Request Policy Jackets

Beginning from an existing Titlesoft® file:

1. In the Quick Order View menu, click **Purchase Price/Dep/Fees**
2. In the Purchase Price/Deposit screen, enter/verify **Purchase Price** and/or **Loan Amount**
3. Click **Premium Calculator**

4. In the Premium Calculation screen, calculate premiums for Policies and Endorsements, as applicable

5. Navigate to **Commitment & Policies** tab
6. Click **Owner's Policy** or **Loan Policy**
7. Enter **Effective Date**
8. Click **Get Policy Number**

9. In the Send Request screen, File information section, select **Firm**
   NOTE: Your default office will be displayed if only one office is available. You will be presented with a list if more than one office is available.

10. Select **Office**, if needed
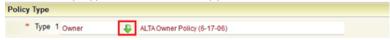11. Select **Underwriter**, if needed

> **NOTE:** Your default underwriter will be displayed if only one is available. You will be presented with a list if more than one underwriter is available.

12. In the Property Information section, select **Property Type**
13. Enter/verify property details

> **NOTE:** indicates a required field.

14. In the Policy Type section, select applicable **Owner** or **Loan Policy**

15. For **Loan Policies**: Select applicable **Endorsement(s)**, if needed
    NOTE: Complete **Fill in Text Here** for each endorsement, if required.

16. For **Short Form Loan Policies**: Select **Signatory**

17. Scroll to the top of the Policy Type screen, click **Send Request** checkbox

> **NOTES:**
> - Jacket will be generated and shown on screen with the Policy Number displayed
> - Jacket will automatically be saved to **Store - Scanned**
> - Print and Save options are displayed at the top of the screen

18. To request an additional Policy, following steps 16-19

Optional - Void Policy Jackets

You can void a completed Jacket Request, if necessary. This process voids the Policy Jacket in Titlesoft® and AgentNet.

1. At the top of the Policy Type screen, click **Void Jacket**
2. Click **Void Product**
3. In the Void Jacket Reason window, enter a Reason for the voided jacket
4. Click **OK**
5. To request a new policy jacket, navigate to the Owner's Policy or Loan Policy screen

   NOTE: You can click **Get Policy Number** to request a new policy jacket.