



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**

Quick Order View

Purchase Price / Deposit

File Information

Purchase Price 2 150,000.00 Loan Amount 125,000.00 150,000.00

Source

Lender/Broker/Loan

Buyer/Seller

Listing/Selling Agent

Additional Contacts

Property

Deed

1

Closing Fees

Realtor's commission

Lender Fees

1200 Government Fees

3 Premium calculator

Pur. Price/Dep./Fees

Title Charges

Paid by Buyer

Paid by Seller

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

Premium Calculation

Update and Exit Cancel

1. Title Insurance Calculation

☐ Based on premium table

☒ Based on fix amount

Sale price 150,000.00 Override 0.00

Loan amount 125,000.00 Override 0.00

CD Full Loan 525.00

Sim. Loan 0.00

Full Owner 650.00

CD Owner 650.00

FO+SL+FL

Prior policy number

Amount 0.00

☐ Simultaneous issue

Calculated amount 0.00

Fixed amount 1,175.00

2. Premium Amounts

☒ Override ☐ Buyer ☐ Seller ☐ Split

Lender's Owner's

Title insurance premium (1104, 1103) 525.00 650.00

Additional charges (Endorsement from line 1112, 1113) 0.00 0.00

Total premium subject to split between agent and underwriter 525.00 650.00

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

Order Commitment & Policies HUD/Trust Accounting Docs Memo Scheduler Exit

Auto Renumber

Commitment

6

Get Policy Number 8

Owner's Policy

Loan Policy

Recording Info.

Owner's Policy No.

Effective Date 7

Effective Time

Tax Year

OR Book

OR Page

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.

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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
2. Click
3. In the Void Jacket Reason window, enter a Reason for the voided jacket
4. Click
5. To request a new policy jacket, navigate to the Owner's Policy or Loan Policy screen

NOTE: You can click to request a new policy jacket.