





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

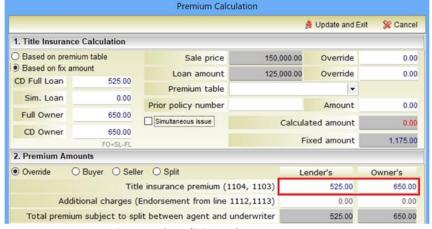
Request Policy Jackets

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.

First American Title Insurance Company, and the operating divisions thereof, make no express or implied warranty respecting the information presented and assume no responsibility for errors or omissions. First American, the eagle logo, First American Title, AgentNet, FAST, First American Eagle Academy, StreamLine, StreamLine ASP, TARA and Title Express are registered trademarks of First American Financial Corporation and/or its affiliates. This document is for informational purposes only and is not and may not be construed as legal advice. No person or entity may rely upon anything contained herein when making legal and/or other determinations regarding its practices, and such person or entity should consult with an attorney prior to embarking upon any specific course of action.







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



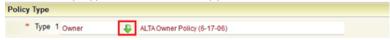
NOTE: Your default underwriter will be displayed if only one is available. You will be presented with a list if more than one underwriter is available.

- 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
- 5. To request a new policy jacket, navigate to the Owner's Policy or Loan Policy screen

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