



## Underwriter Requests in TrackerPro

Learn how to submit a new Underwriter Request for High Liability, Closing Protection Letter Modifications, and other requests using the TrackerPro Integration with AgentNet®.

### First American High Liability Approval

TrackerPro provides two different paths to submit a file for High Liability Approval to First American:

#### Path 1

During the **Create EJacket** process, if you have exceeded your Risk Limit with First American, you will be asked if you want to submit an OLA Request. Selecting **Yes** displays the **OLA Request** screen.

Microsoft Access

Successfully processed EJacket operation but encountered warning(s):  
The Policy Jacket has been created/updated successfully with a Policy Amount which exceeds your Agency's Policy Issuing Authority/Authorized Risk Limit. If you do not have a First American Title underwriter's approval for this transaction, please submit an Underwriting Request through AgentNet.

Do you want to submit an OLA Request now?

#### Path 2

Click the **Hi-Li Approval** button on the **Policy Documents** screen to submit for OLA Approval.

Title Policies

Select Policies to Create:

First American Title Insurance Company

Title Policies:	
Owners Fee Simple	\$800,000,000.00
Loan Mortgage	\$650,000,000.00

Policy Details:

Policy Number:	Issued Date:	End. Issued:	Policy Date:	Upload Date:

Typed by: Typed Date: ☐ HiLi Approval Granted

Create Policy Create All Policies Update Policy Update All Policies Create Policy PDF Policy Upload Setup

Create EJacket Policy Register Recording Endorsement Hi-Li Approval Exit



On Path 2 the **First American Basic Information** screen will display. This screen will confirm the basic file information that will be sent to First American and allow you to select the submission's **Firm** and **Office**.

First American Basic Information

User Guide

Firm	DEMO - ABC Settlement Services	Default	Username	Idemo_3	Password	Edit
Office	DEMO - ABC Settlement Services/NY/Plattsbur	Default for NY	Idemo_3			Save
Underwriter	First American Title Insurance Company					
Account Number	4070814					

Title Number: NY-FA-14023 Client File Status: Open

Property

Line 1	2500 Grand Ave	Line 2	
City	Massapequa	State	NY
APN		Property Type	Commercial
District		Section	1
		Block	2
		Lot	3
		Unit	
Sale Price Amount	\$50,000,000.00		
Legal Description			

More

Sellers/Buyers

Borrower	Commercial Renovators, Inc.	Add
Seller	Liberty Construction, LLC	Remove

Entity

Party Name	Commercial Renovators, Inc.	Tax ID		Entity Type	NotProvided	Contact Info
First Name		Middle		Last Name		Suffix
Marital Status	NotProvided	MarriedTo				

Full Vesting: Liberty Construction, LLC

Cancel Continue

- On both paths, the **OLA Request** screen will display.
- Complete the form, as applicable. Here you can enter any relevant information you wish to include in the request, or indicate you wish to make a non-OLA request. For Hi-Li requests, please be sure to enter whether the land is Improved with a structure or Unimproved. You can also **Add** any documents that should be sent over to First American and enter contact information for your Agency and for First American.

## First American Hi-Li Request

First American Hi-Li Request

User Guide

Request Name: NY-FA-14023

Scheduled Closing Date: 2/1/2023

Max Liability Amount: \$50,000,000.00

Transaction Type: Purchase

Mortgage Modification: No Multi-site? No

Use of Land: Industrial

☒ Over/Underwriting Limit or Considered High Liability ☐ Other Requests (CPL Modification, MLRA, Special Pricing, etc.)

Over Limit Approval

Risk Definition: If the Estimated Total Liability amount is more than your authority limit, please specify all relevant information with relevant details (including Proposed Policies)

DETAILS - Land is improved with a commercial structure.

Policies

TP Name	FA Name	FA Insured	FA Endors.	Details
Fee Simple	NY ALTA Owners ...	Commercial Renovator...	Set	
Mortgage	NY ALTA Loan Poli...	Bank of America	Set	

Documents

IMG_2159	Photos	Add	Size (Max 32 MB)
		Remove	27.67 MB
		Modify	

Contact: Christine Heffner

Approver: New York (Agency)

Cancel Submit Now



3. In the Policies section, TrackerPro automatically fills in the **Policy information**. Click the **Details** button to adjust the **Policy Type, Endorsements**, or other policy information. Select **Ok**.

First American OLA Policy Information

First American UWB Policy Info [User Guide](#)

Name of Insured	Citi Lending								
TP Policy Type	Mortgage								
FA Policy Type	NY ALTA Loan Policy (6-17-06) ▼								
Policy Amount	\$650,000,000.00								
Estate/Interest	<input checked="" type="checkbox"/> Fee <input type="checkbox"/> Lease <input type="checkbox"/> Other								
Exceptions deleted									
Endorsements	<table><tr><td>Standard New York Endorsement Loan</td><td>Standard New York Endorsement (Loan Policy) (For ALT...</td></tr><tr><td>Environmental Protection Lien Endorsement</td><td>TIRSA EPL (8.1) (4/24/01)</td></tr><tr><td>Residential Mortgage Endorsement</td><td>TIRSA Residential Mortgage Endorsement (1-4 Family) (8...</td></tr><tr><td>Waiver of Arbitration Endorsement Loan</td><td>TIRSA Waiver of Arbitration Endorsement (Owner's or Lo...</td></tr></table>	Standard New York Endorsement Loan	Standard New York Endorsement (Loan Policy) (For ALT...	Environmental Protection Lien Endorsement	TIRSA EPL (8.1) (4/24/01)	Residential Mortgage Endorsement	TIRSA Residential Mortgage Endorsement (1-4 Family) (8...	Waiver of Arbitration Endorsement Loan	TIRSA Waiver of Arbitration Endorsement (Owner's or Lo...
Standard New York Endorsement Loan	Standard New York Endorsement (Loan Policy) (For ALT...								
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Waiver of Arbitration Endorsement Loan	TIRSA Waiver of Arbitration Endorsement (Owner's or Lo...								
TP Endorsement	Standard New York Endorsement Loan								
FA Endorsement	Standard New York Endorsement (Loan Policy) (For ALTA 06/17/06) (11/1/08) ▼								

[Ok](#)

4. In the **Documents** section, select **Add** to include documents with your request. Browse to select the document to include with the OLA. Select the **Document Type** from the drop-down and enter any additional descriptive information. Select **Ok**.

First American OLA Documents

First American UWB Document [User Guide](#)

File	New Text Document.txt	<a href="#">Browse</a>
Document Type	Preliminary Rpt/Commitment ▼	
Document Name	New Text Document	
Document		

[Cancel](#) [Ok](#)

5. Select the **Approver** group from the available options in the drop-down.
6. Select **Submit Now**.



## Status and Decision

After the OLA Request has been submitted, the **Hi-Li Approval** button on the **Policy Documents** screen will change to **Hi-Li Status**.

Title Policies

Select Policies to Create:

First American Title Insurance Company

Title Policies:

Loan Mortgage	\$6,250,000.00
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Policy Details:

Policy Number:	Issued Date:	End. Issued:	Policy Date:	Upload Date:

Typed by: Typed Date:

Buttons: Create Policy, Create All Policies, Update Policy, Update All Policies, Create Policy PDF, Policy Upload, Setup, Create EJacket, Policy Register, Recording Endorsement, **Hi-Li Status**, Exit.

1. Click **Hi-Li Status** to display the status of your request

Title Policies

Select Policies to Create:

First American Title Insurance Company

Title Policies:

Loan Mortgage	\$6,250,000.00
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Policy Details:

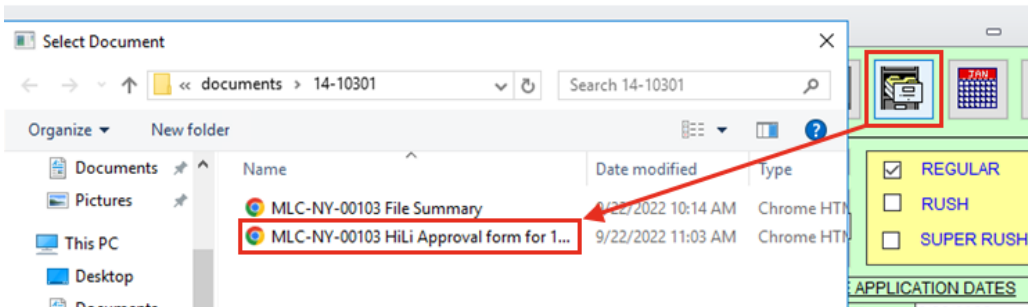
Policy Number:	Issued Date:	End. Issued:	Policy Date:	Upload Date:

Typed by: Typed Date:

Buttons: Create Policy, Create All Policies, Update Policy, Update All Policies, Create Policy PDF, Policy Upload, Setup, Create EJacket, Policy Register, Recording Endorsement, **Hi-Li Status**, Exit.

Modal Dialog: First American  
Hi-Li Status: Approved  
OK

**NOTE:** Any documents made available by First American will be downloaded into the File Cabinet.



2. First American will email the **Contact** displayed on the **OLA Request** screen when the file is decided

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