

# First American Title User Guide (v1.0)

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## Introduction

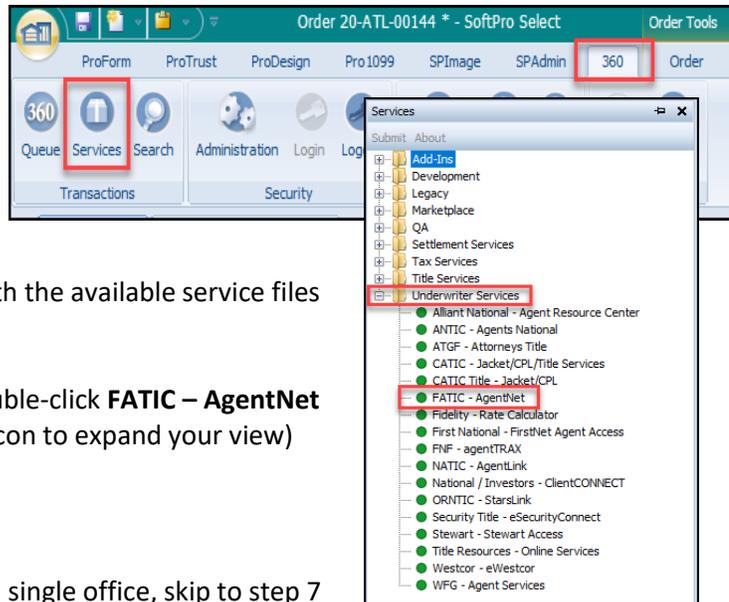
Learn how to submit a new Underwriting Request to get underwriting authorization for over Underwriting Limit or High Liability requests, request Closing Protection Letter Modifications, and attach documents to the request in SoftPro 360®

## Accessing and Placing a New Order

Beginning with an Open Order that includes basic order information:

1. From the **360** tab

2. Select the **Services** icon in the Ribbon



**NOTE:** The **Services** window opens with the available service files displayed

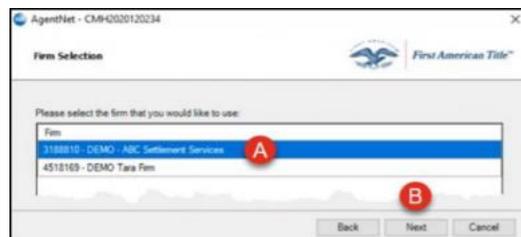
3. In the Underwriter Services folder, double-click **FATIC – AgentNet** (If your folder is collapsed, click the + icon to expand your view)

4. Enter your AgentNet credentials

**NOTE:** If you are attached to a single office, skip to step 7

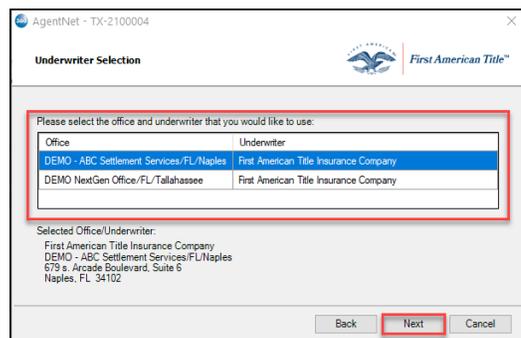
5. In the **Firm Selection** window (if applicable):

- a. Select the firm you want to use
- b. Click **Next**

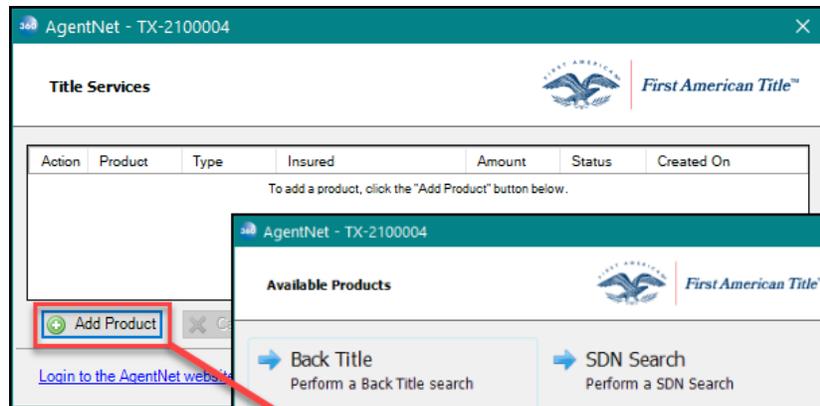


6. In the **Underwriter Selection** window:

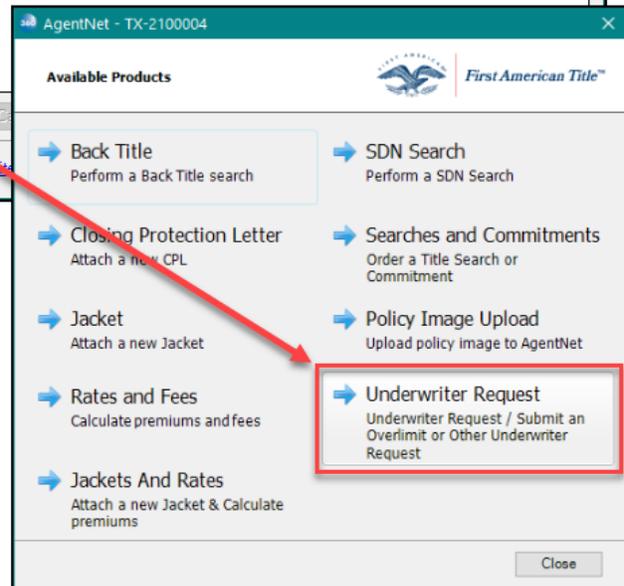
- a. Select the office you want to use
- b. Click **Next**



7. In the **Title Services** window, click **Add Product**



8. In the **Available Products** window, click **Underwriter Request**



9. In the **Underwriter Request** window:
- Complete the **Est. Closing Date** field.
  - Choose the Transaction Type for your Order
  - The **Mortgage Modification** and the **Multisite** fields will be defaulted to **No**. If applicable, change the value(s) to **Yes**.
  - Select **Current Use of Land** from the drop-down arrow.
  - Change the values, as needed for the **Survey** and/or **Inspection**. These fields are defaulted to **No**.

Once either of these selections change to a **Yes**, their associated **Date** fields will become required.

- f. Click **Next**

10. In the **Over Limit/Other Request** window:

- Select the type(s) of request
- Enter details to share with the Underwriters as applicable in the text boxes
- Select **Add to ProForm Notes** to add to the file notes that you submitted the Underwriter Request
- Click **Next**

11. The **Proposed Policies and Endorsements** window contains several areas, which are optional. However, by completing this window, this will assist the Underwriter to 'expedite the decisioning process'.

**Note:** Should you decide **NOT** to complete some of the available fields, click **Next** and skip to number **12** below.

- Choose the **Policy Type** from the available Policy in the drop-down arrow;
- Select the applicable **Liability Amounts** using the drop-down arrow;
- The **Name of Insured** will fill in from your Order, however this field is over-writable;

- d. The checkboxes in the **Estate/Interest** field allows you to choose one or several of the available checkbox options: **Fee, Lease and Other**. By default, **Fee** will be checked, should it not apply, simply uncheck the box.
- e. If you are requesting a Special Exception (if not, skip to step G), click the **Exception deleted from policy** blue hyperlink;
  - i. In the **Exception deleted from policy** window, describe the deletion for the Underwriter;
  - ii. Click **OK**
- f. Select any applicable **Endorsement(s)** in the scrollable box.
- g. If applicable, and you have entered information for a policy, click **Add this Policy**. You are able to add up to 5 different policies. (If you did **not** fill in the Policy information, skip to Step **h** below.
- h. Once you are finished adding the information (optional) or did not utilize the **Proposed Policies and Endorsements** screen, click **Next**.

12. In the **Add Documents** window to assist in the Underwriter’s review:

- a. Click **Browse** button to choose a document from your computer.
- b. Click on the:
  - i. **Attachments** button to pull in a document from the **Attachments** screen in your order; or
  - ii. click **ReadyDoc** to create a document on the fly.

Document Name	Document Type	Document Description
OTL Request	Underwriting Request ...	

Total allowed file size is 50MB.

- c. Select the **Document Type** by clicking the drop-down arrow. If you select **Other**, the **Document Description** field becomes required.
- d. You can select a newly added Document and use **Rename** and **Delete** buttons to the right, if needed.
- e. Continue adding as many documents as needed by repeating **Items A - D**.
- f. Click **Next** once all documents have been gathered and are ready for submission.

13. In the **Contact And Approver** window, your contact information is shown by default. Should the contact for this Request be a different individual, adjust the **Name** and **Email**.
14. Select the appropriate **Underwriting Approver** to receive the Request.

**NOTE:** Selections displayed are based on the property address. The state's Underwriting Groups are at the top of the list by default, with **National Agency – Commercial** and **National Agency – Residential**; individuals below have authority for the property address.

15. Click **Submit**

**NOTE:** **Progress Status** window shows progress of submission to AgentNet, which will build the file, open the Underwriting Request, and send it to the Underwriting Workbench at First American.

The Underwriter or group assigned will receive notification of your new request, process your information, consider and decision it on the First American side.

16. The **Title Services** window shows the status of your request. Click **Close**

## Check Request Status

To open the queue at the bottom of the screen and see the Underwriter Request progress:

- a. On the **360** tab, click **360 Queue**

**NOTE:** If something goes wrong with the request, the Status will display **Error** or **Rejected**. Click the **Log** icon to open a window and see audit trail details and where the error may have occurred.

**NOTE:** If you need to call SoftPro for support, reference the **Transaction Number** on the far right in the queue:

## Response Emails

You don't get an automated email from the Underwriting Workbench when your request submission is successful, but you will get an email when the Underwriter makes a request decision. That email will inform you of what actions you must take and what decision was made.

Transaction details are included in the email body. Request responses can be **approved**, **approved with conditions**, **declined** or **canceled**.

- If your request is **declined**, you will get an email from the Underwriting Workbench that says **Declined** in the subject. The email includes an attached approval form PDF completed noting the request is declined, signed by Underwriter and asking you to work with your Underwriter to proceed.
- If your request is **approved**, you will get an email from the Underwriting Workbench saying the request is **approved**, with attached approval form(s) signed by the Underwriter.
- If your request is **approved with conditions**, review the attached approval form to see what the conditions are.

### *Add the Decision to the Order*

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In the queue, double-click on the request to open it and see the request decision, and pull the documents into the Order.

After the request is decided:

1. In the queue, click **Next Step** to save the Order and open the Launcher again:
2. If needed, click **Refresh** to pull in the decision from the Underwriting Workbench through AgentNet  
**NOTE:** The Request Status in the example screen above is Prep, meaning the decision has not been pulled through from the Underwriting Workbench. Clicking Refresh pulls back any documents that have been completed and updates the Request Status in the window. Forms that were attached to the decision email will pull through and display in the Approval Documents area in the lower part of the window, along with any documents you sent to the Underwriter.  
**NOTE:** Documents are selected by default.
3. Click **Accept** to accept approval forms into the **Attachments** screen  
**NOTE:** Once all the information is imported to the Order, in the queue, the Underwriter Request **Status** changes to **Completed**.