

# FATIC - AgentNet Policy Jacket User Guide

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July, 2023

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## History

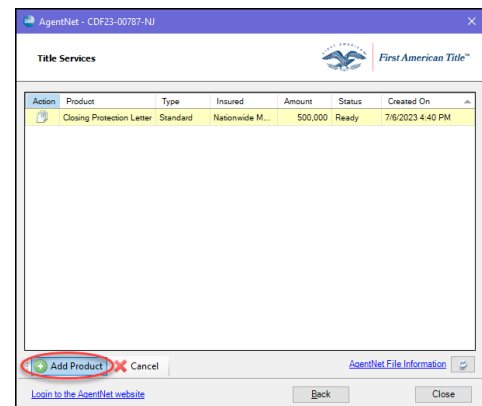
| Date      | Details                            |
|-----------|------------------------------------|
| July 2023 | Separating user guides per-product |

## Introduction

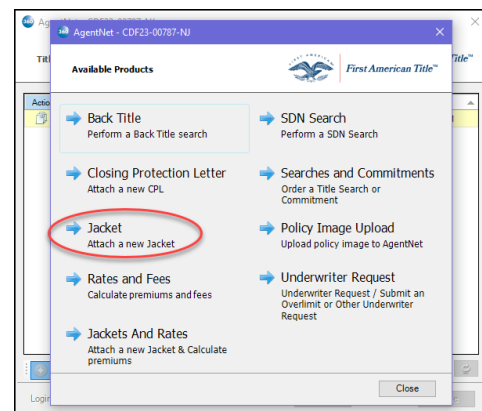
Using the ProForm order's information, this Jacket product will allow a user to simultaneously pull Jackets to prepare policies without leaving the integration.

## Creating a Policy Jacket in AgentNet

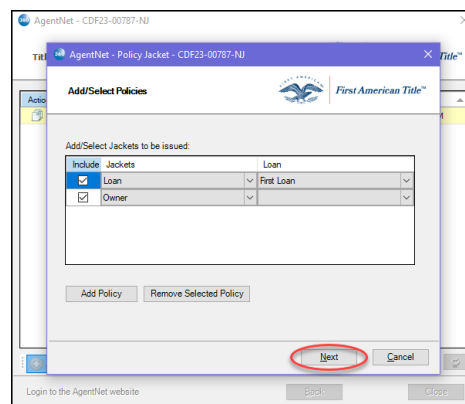
1. To order Policy Jacket(s), click the **Add Product** icon at the bottom of the **Title Services** screen.



2. On the **Available Products** screen, select **Jacket**.

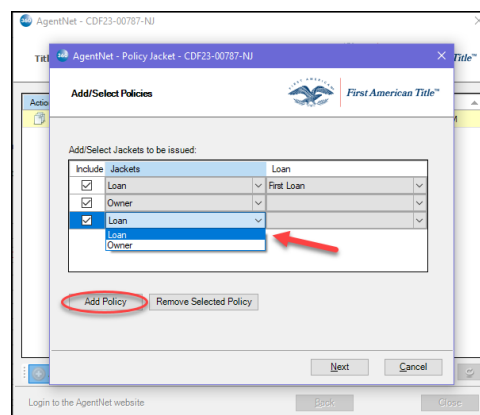


3. The **Add/Select Policies** screen presents the option to choose between Loan, and Owner Jackets. Policies can be Selected or Unselected as deemed appropriate.
4. Once the appropriate selections have been made, click **Next** to continue.



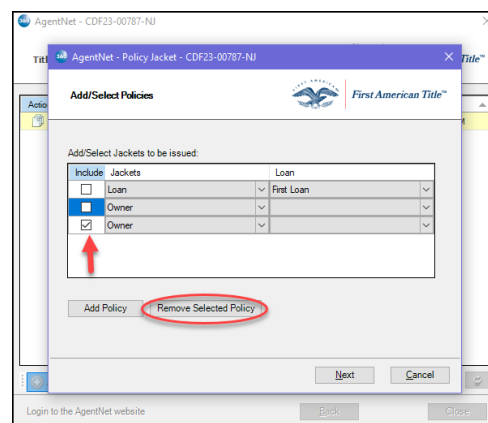
## Adding Additional Policies

Additional policies can be added to the request by clicking on the **Add Policy** button. If there are multiple loans, they will be available in the drop-down box under the **Loan** column.



## Removing Policies

To remove a Policy, select the Policy to be removed and click the **Remove Selected Policy** button.



## Loan Policy Information Screen(s)

1. If a Loan Policy has been selected, the **Loan Policy Information** screen will present options for Form Type, Rate Type, and other fields necessary for completing the Jacket request.
2. Several fields such as Policy Premiums, Endorsement Descriptions, and Endorsement Premiums populate from the ProForm Order. The fields on this screen can be overwritten. Any changes to the information on this screen will **NOT** write back to the Order.
3. Any field represented by a red \* will require completion prior to moving forward.
4. To view or modify the itemized Endorsement Premiums, click on the **Endorsement Details** hyperlink.
5. Click **Close** when complete.
6. Click **Next** or **Submit** to continue.

AgentNet - CDF23-00787-NJ

AgentNet - Policy Jacket - CDF23-00787-NJ

**Loan Policy Information**

| Name                  | Value                               |
|-----------------------|-------------------------------------|
| Policy Type           | Loan Policy                         |
| Form Type             | -- Select --                        |
| Rate Type             | No rate types for this jacket type. |
| Include Agent Address | Yes                                 |
| Loan Number           | 13456789                            |
| Policy Amount         | 500,000.00                          |
| Premium               | 25.00                               |
| Date Of Policy        | 5/8/2023 12:00:00 PM                |
| Mortgage Amount       | 500,000.00                          |
| Mortgage Date         | 04/14/2023                          |
| Addendum              | No Addendum Attached                |

Back Next Cancel

Login to the AgentNet website

AgentNet - Policy Jacket - CDF23-00787-NJ

**Endorsement Details**

| Name   | Gross Premium | Net Premium |
|--|---------------|-------------|
| ALTA 8.1-06 (Environmental Protection Lien (New Jersey Variat... | 25.00         | 0.00        |
| ALTA 5.1-06 (Planned Unit Development)                           | 25.00         | 0.00        |

Close

Back Next Cancel

Login to the AgentNet website

AgentNet - CDF23-00787-NJ

AgentNet - Policy Jacket - CDF23-00787-NJ

**Loan Policy Information**

| Name                  | Value  |
|-----------------------|--|
| Policy Type           | Loan Policy  |
| Form Type             | NJRB 2-16 ALTA Loan Policy (6-17-06; Rev. 7-1-18)  |
| Rate Type             | Standard   |
| Loan Number           | 13456789   |
| Policy Amount         | 500,000.00   |
| Date Of Policy        | 5/8/2023 12:00:00 PM   |
| Include Agent Address | Yes  |
| Policy Premium        | 25.00  |
| Policy Net            | 5.00   |
| Endorsements          | ALTA 8.1-06 (Environmental Protection Lien (New Jersey ...<br>ALTA 5.1-06 (Planned Unit Development) |

Back Next Cancel

Login to the AgentNet website

## Owner Policy Information Screen(s)

1. If an Owner Policy has been selected, the **Owner Policy Information** screen will present options for Form Type, Rate Type, and other fields necessary for completing the Jacket request.
2. Several fields such as Policy Premiums, Endorsement Descriptions, and Endorsement Premiums populate from the ProForm Order. The fields on this screen can be overwritten. Any changes to the information on this screen will **NOT** write back to the Order.
3. Any field represented by a red \* will require completion prior to moving forward.
4. To view or modify the itemized Endorsement Premiums, click on the **Endorsement Details** hyperlink.
5. Click **Close** when complete.
6. Click **Next** or **Submit** to continue.

| Name                  | Value   |
|-----------------------|---|
| Policy Type           | Owner's Policy  |
| Form Type             | -- Select --  |
| Rate Type             | -- Select -- *  |
| Loan Number           | 13456789  |
| Policy Amount         | 650,000.00  |
| Date of Policy        | 5/8/2023 12:00:00 AM  |
| Include Agent Address | No  |
| Policy Premium        | 2,638.00  |
| Policy Net            | 527.60  |
| Endorsements          | (Survey Endorsement (Without Survey)) for Residential Co... |
| Endorsement Premiums  | 25.00   |

Buttons: Back, Next, Cancel

| Name   | Gross Premium | Net Premium |
|--|---------------|-------------|
| (Survey Endorsement (Without Survey)) for Residential Condominiums | 25.00         | 0.00        |

Buttons: Back, Next, Cancel, Close

| Name                  | Value   |
|-----------------------|---|
| Policy Type           | Owner's Policy  |
| Form Type             | ALTA Owner's Policy (6-17-06)                               |
| Rate Type             | Standard  |
| Loan Number           | 13456789  |
| Policy Amount         | 650,000.00  |
| Date of Policy        | 5/8/2023 12:00:00 AM  |
| Include Agent Address | No  |
| Policy Premium        | 2,638.00  |
| Policy Net            | 527.60  |
| Endorsements          | (Survey Endorsement (Without Survey)) for Residential Co... |
| Endorsement Premiums  | 25.00   |

Buttons: Back, Next, Cancel

## Additional Questions and/or Additional Title Charges Screen(s)

- Depending on the Property State, an **Additional Questions** screen and/or an **Additional Title Charges** screen may appear for displaying CPL fees and other information.

- CPL fee state with no municipal premium taxes or state policy fees:

| Description  | Charge  |
|--|---------|
| <input checked="" type="checkbox"/> CPL Lender                 | \$25.00 |
| <input checked="" type="checkbox"/> CPL Borrower(s) / Buyer(s) | \$25.00 |

- CPL fee state with **Additional Questions** required for CPL pricing:

**CPL Standard**

Borrower(s) / Buyer(s)

Is the buyer/borrower the only party to the transaction obtaining closing protection coverage?

No

- CPL Fee state with municipal premium taxes (KY):

Note: Additional Title Charges from ProForm will appear in the lower grid as optional selections to be included with the remittance submission.

| Description  | Charge  |
|--|---------|
| <input checked="" type="checkbox"/> CPL Lender                 | \$50.00 |
| <input checked="" type="checkbox"/> CPL Borrower(s) / Buyer(s) | \$0.00  |

| Description                                      | Charge   |
|--|----------|
| <input checked="" type="checkbox"/> County Tax   | \$150.00 |
| <input checked="" type="checkbox"/> City Tax     | \$25.00  |
| <input checked="" type="checkbox"/> Escrow Fee   | \$525.00 |
| <input checked="" type="checkbox"/> Doc Prep Fee | \$150.00 |



- d. CPL Fee state with state policy fees (IN/IL):  
Note: The state policy fee will be included for each Jacket requested.

| Description  | Charge  |
|--|---------|
| <input checked="" type="checkbox"/> CPL Lender                 | \$25.00 |
| <input checked="" type="checkbox"/> CPL Borrower(s) / Buyer(s) | \$25.00 |
| <input checked="" type="checkbox"/> CPL Seller(s)              | \$25.00 |


  

| Description  | Charge |
|--|--------|
| <input checked="" type="checkbox"/> State Policy Fee | \$5.00 |
| <input checked="" type="checkbox"/> State Policy Fee | \$5.00 |

2. Non-CPL Fee states will not present an **Additional Questions** or **Additional Title Charges** screen and the **Submit** button would be located on the **Policy Information** screen.



| Name                  | Value  |
|-----------------------|--|
| Policy Type           | Owner's Policy                                       |
| Form Type             | ALTA Owner's Policy (7-1-21)                         |
| Rate Type             | Basic  |
| Loan Number           | 998877665544   |
| Policy Amount         | 500,000.00   |
| Date of Policy        | 10/5/2022 9:22:00 AM                                 |
| Include Agent Address | Yes  |
| Policy Premium        | 2,575.00   |
| Policy Net            | 84.98  |
| Endorsements          | ALTA Endorsement 25.1-06 (Same As Portion of Survey) |
| Endorsement Premiums  | 150.00   |

## Review Policies Screen

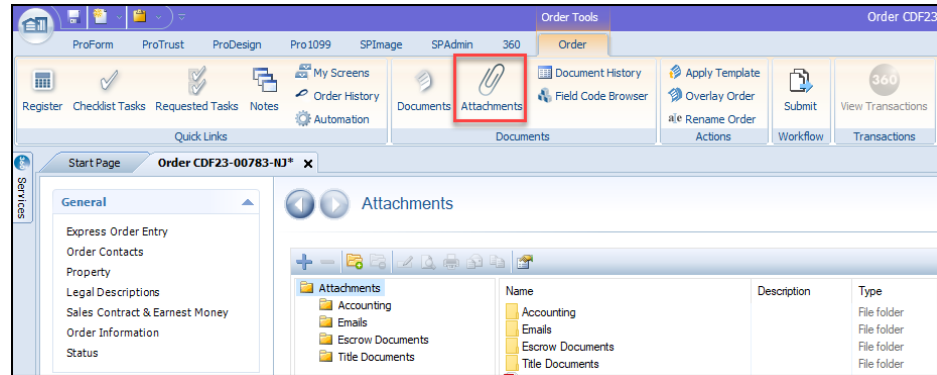
1. In the **Review Policies** screen, the Jackets can be viewed by selecting the View icon  next to the document name.
2. Click **Accept** to import the document(s) and policy number(s) into ProForm.
3. The document(s) will be available in the **Attachments** screen.

| Policy Numbers                                   | Current Value | New Value        |
|--|---------------|------------------|
| <input checked="" type="checkbox"/> Name         |               |                  |
| <input checked="" type="checkbox"/> Loan Policy  |               | 5036034-0162891e |
| <input checked="" type="checkbox"/> Owner Policy |               | 5011434-0253875e |

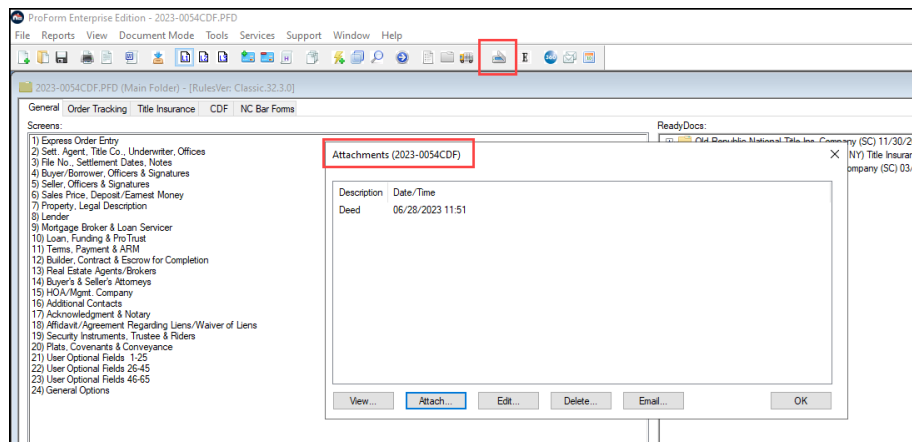
  

| View                                | Copy   | Document Name | File Name        | File Size | Transferred |
|-------------------------------------|--|---------------|------------------|-----------|-------------|
| <input checked="" type="checkbox"/> |  | LP-58166841_  | LP-58166841_.pdf | 207.50 KB | 100%        |
| <input checked="" type="checkbox"/> |  | OP-58166842_  | OP-58166842_.pdf | 218.35 KB | 100%        |

## In SoftPro Select



## In SoftPro Standard or SoftPro Enterprise



4. The policy number(s) will be available in the **Policy - Schedule A** and **Title Insurance Premiums** screens.

The screenshot shows the Title Insurance Premiums screen. It has two main sections: Owner's Policy and Loan Policy. In the Owner's Policy section, the policy number is 5876873663967. In the Loan Policy section, the policy number is 78729382923. Red arrows point to these policy numbers.

The screenshot shows the Policy - Schedule A screen. The Policy number field is highlighted with a red arrow. The policy number is 78729382923.