

FATIC - AgentNet Policy Jacket and Rates User Guide

July, 2023

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History

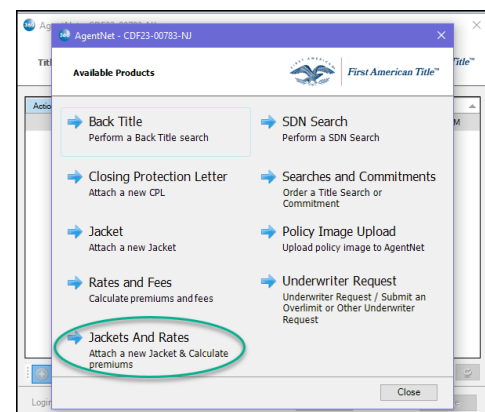
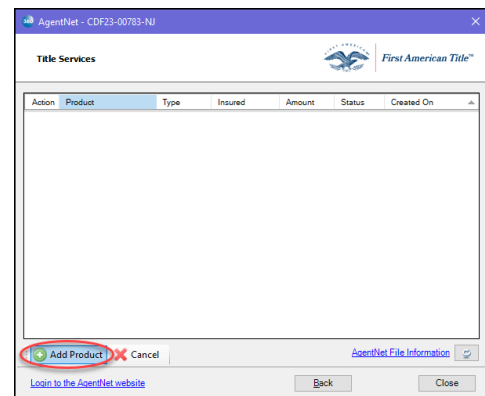
Date	Details
December 2022	Release of new enhanced Jacket product which prepares an order for remittance
July 2023	Corrected Typographical errors.

Introduction

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

Creating Policy Jackets and Rates

1. To order a Jacket and prepare a file for remittance, click the **Add Product** icon at the bottom of the **Title Services** screen.
2. On the **Available Products** screen, select **Jackets and Rates**.



- From the **Jacket Selection** screen, choose the Jackets needed.

Click **Next**.

AgentNet - CDF23-00783-NJ

AgentNet - Jacket and Rates - CDF23-00783-NJ

Jacket Selection

Select the Jacket to be issued:

☒ Simultaneous

☐ Lender

☐ Owner

First Loan

Next Cancel

Login to the AgentNet website

- The fields on the **Loan Policy Information** screen will populate with information 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.

AgentNet - CDF23-00783-NJ

AgentNet - Jacket and Rates - CDF23-00783-NJ

Loan Policy Information

Name	Value
Policy Type	Loan Policy
Form Type	ALTA Short Form Exp Cov Res Loan Policy (Rev. 2-1...
Rate Type	Construction
Policy Amount	500,000.00
Loan Number	13456789
Include Agent Address	Yes
Premium	2,225.00
Policy Date	7/28/2023 12:00:00 PM
Mortgage Amount	500,000.00
Mortgage Date	04/14/2023
Addendum	No Addendum Attached
Rate Effective Date	

Back **Next** Cancel

Login to the AgentNet website

The system uses the date of the Policy to auto calculate the **Rate Effective Date**. If the effective date is different than the date of the Policy, the hyperlink will allow a date to be manually entered for the purposes of rate calculation.

Click **OK** to exit the **Rate Effective Date** screen.

Click **Next** to proceed to the Loan Endorsements.

AgentNet - CDF23-00783-NJ

AgentNet - Jacket and Rates - CDF23-00783-NJ

Loan Policy Information

Name	Value
Policy Type	Loan Policy
Form Type	ALTA Short Form Exp Cov Res Loan Policy (Rev. 2-1...
Rate Type	Construction
Policy Amount	500,000.00
Loan Number	13456789
Include Agent Address	Yes
Premium	2,225.00
Policy Date	7/28/2023 12:00:00 PM
Mortgage Amount	500,000.00
Mortgage Date	04/14/2023
Addendum	No Addendum Attached
Rate Effective Date	

Rate Effective Date

Rate Effective Date: [Date Field]

(Optional - system uses Date of Policy for calculation of premium and fees unless this date is selected)

OK Cancel

Back **Next** Cancel

Login to the AgentNet website

- In the **Loan Endorsements Included with Policy** screen select the Endorsements utilizing the Select checkbox(es).

This screen will populate any Loan Policy endorsements that are included in the ProForm order as a reference.

Note: Any additional Endorsements selected on this screen will **NOT** populate back into the ProForm order.

Click **Next** to continue.

- The fields on the **Owner's Policy Information** screen will populate with information 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.

The system uses the date of the Policy to auto calculate the **Rate Effective Date**. If the effective date is different than the date of the Policy, the hyperlink will allow a date to be manually entered for the purposes of rate calculation.

Click **OK** to exit the **Rate Effective Date** screen.

Click **Submit** to proceed.

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): No

Is the buyer/borrower the only party to the transaction obtaining closing protection coverage? No

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

KY Tax Code: 000

CPL Fee state with **state policy fees** (IN/IL)

AgentNet - 2022121130N4

AgentNet - Policy Jacket - 2022121130IN

Additional Title Charges

CPL Fees Returned from AgentNet

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

State Policy Fees

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

Back Submit Cancel

Login to the AgentNet website

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

AgentNet - 2022121129KY

AgentNet - Policy Jacket - 2022121129KY

Additional Title Charges

CPL Fees Returned from AgentNet

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

Please Select Premium Taxes from ProForm

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

Back Submit Cancel

Login to the AgentNet website

- 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.

AgentNet - 2022121140FL

AgentNet - Policy Jacket - 2022121140FL

Owner Policy Information

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

Endorsement Details

Back Submit Cancel

Login to the AgentNet website

Review Screen

1. The Jackets and Rates will be returned in the **Review** screen and all fee information will have been submitted to **AgentNet** to prepare the file for remittance.
2. The **Review Policies** screen displays the document(s), Calculated Rates, and policy number(s).
3. The **Hold from Auto-Reporting** will suppress the information from being sent to AgentNet.
4. The **Write Split Amounts to Order** will import the negotiated split into the ProForm Order.
5. Click **Accept** to import the document(s) and policy number(s) into ProForm.

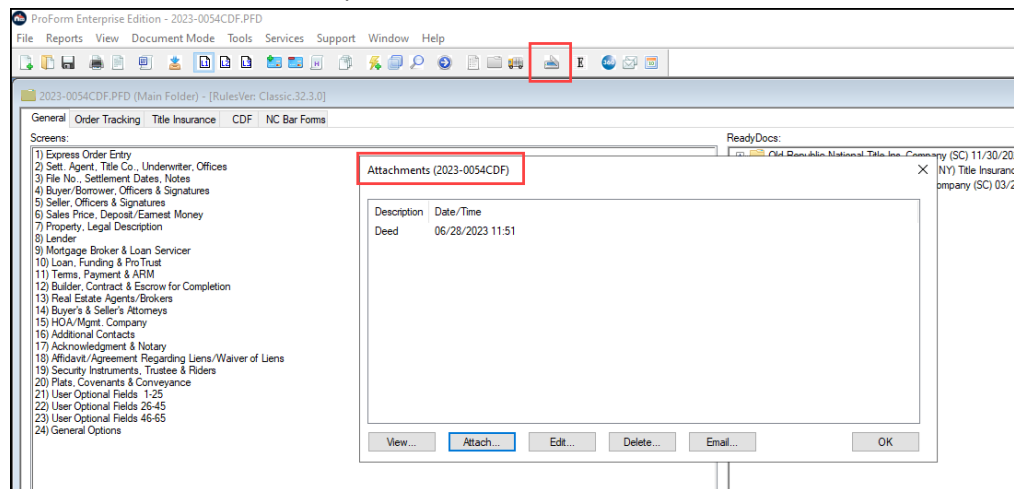
Name	Current Premium	New Premium	Agent Amt	Net	TRID Amount	Charge
ALTA Short Form E...	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	
ALTA Owner's Poli...	\$2,638.00	\$0.00	\$0.00	\$0.00	\$0.00	
Total:	\$2,663.00	\$0.00	\$0.00	\$0.00		

View	Copy	Document Name	File Name	File Size	Transferred
<input checked="" type="checkbox"/>		LP-58165439_	LP-58165439_.pdf	175057	100%
<input checked="" type="checkbox"/>		OP-58165440_	OP-58165440_.pdf	224358	100%
<input checked="" type="checkbox"/>		RatesFees_44bd8ca1	RatesFees_44bd8ca1.pdf	116912	100%

6. The document(s) will be available in the **Attachments** screen.

In SoftPro Select

In SoftPro Standard or SoftPro Enterprise



7. 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. The 'Owner's Policy' section displays the following information:

- Policy number: 5876873663967
- Coverage amount: \$650,000.00
- Seller pay %: [blank]
- Final owner's premium: \$2,638.00
- SI net owner's premium: \$438.00
- Remarks: [blank]

The 'Loan Policy' section displays the following information:

- Policy number: 78729382923
- Coverage amount: \$500,000.00
- Seller pay %: [blank]
- Final loan premium: \$25.00
- Full loan premium: \$2,225.00
- Remarks: [blank]

Red arrows point to the policy numbers in both sections.

The screenshot shows the Policy - Schedule A screen. The 'Policy' section displays the following information:

- Policy: [blank]
- Policy number: 78729382923
- Coverage amount: \$500,000.00
- Issued date/time: [blank]
- Effective date/time: [blank]
- Date/Time completed: [blank]
- Lock status: Unlocked
- Completed by: [blank]

A red arrow points to the policy number.