

FATIC - AgentNet Rates & Fees User Guide

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History

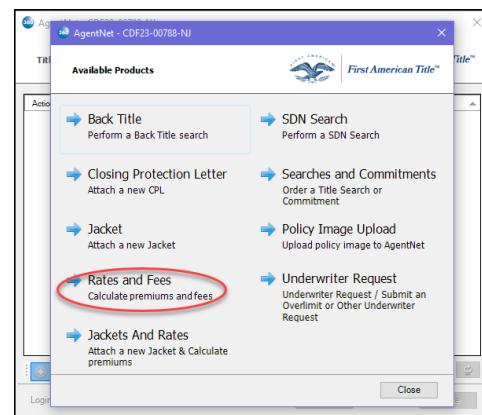
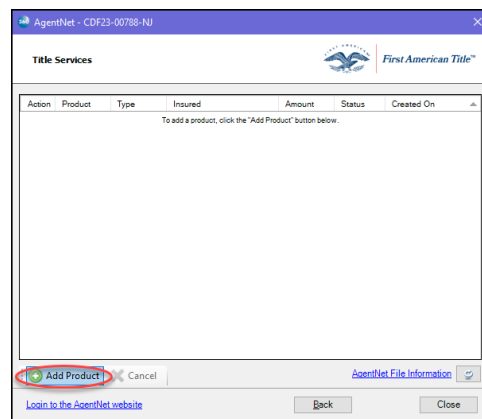
| Date | Details |
|-----------|------------------------------------|
| July 2023 | Separating user guides per-product |

Introduction

Using the ProForm order's information, the Rates & Fees product will calculate the rates and fees for the ProForm Order without leaving the integration.

Requesting a Closing Protection Letter

1. To order a Closing Protection Letter, click the **Add Product** icon at the bottom of the **Title Services** screen.
2. On the **Available Products** screen, select **Rates and Fees**.



- Choose the product in the **Rates and Fees** screen and click **Next**.

- If Policies or Both was selected on the previous screen, choose the policy type in the **Jacket Selection** screen, and click **Next**.

- If a Loan Policy has been selected, 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.

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.

- If Owner's Policy has been selected, 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:

AgentNet - 20221211280H

AgentNet - Policy Jacket - 20221211280H

Additional Questions

CPL Standard

| Borrower(s) / Buyer(s) |
|--|
| Is the buyer/borrower the only party to the transaction obtaining closing protection coverage? |

No

Back Next Cancel

Login to the AgentNet website

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

AgentNet - 2022121129KY

AgentNet - Policy Jacket - 2022121129KY

Additional Questions

KY Tax Code

000

Back Next Cancel

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

AgentNet - 2022121130IN

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

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

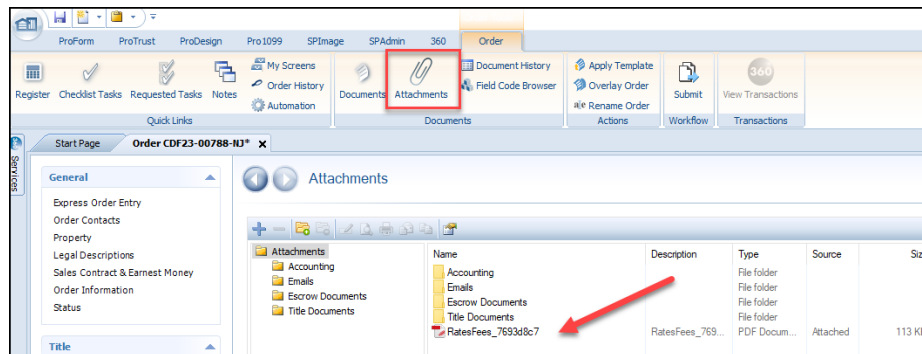
- Non-CPL Fee states will not present an **Additional Questions** or **Additional Title Charges** screen and the **Submit** button would be located on the **Policy Information** screen.

Review Screen

- The **Review** screen display the document(s), Calculated Rates, and fee(s). The View icon  allows a document to be viewed prior to accepting into the ProForm order.
- The **Hold from Auto-Reporting** will suppress the information from being sent to AgentNet.
- The **Write Split Amounts to Order** will import the negotiated split into the ProForm Order.
- Click **Accept** to import the document(s) into ProForm.

7. The Rate and Fees document will be in the **Attachments** section on the order's ProForm Ribbon.

In SoftPro Select



In SoftPro Standard or SoftPro Enterprise

