

FATIC - AgentNet Underwriter Request

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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, 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[®].

Initiate an Underwriting Request

 To order a Closing Protection Letter, click the Add Product icon at the bottom of the Title Services screen.

				1	SO	First American	Tit
Action	Product	Туре	Insured	Amount	Status	Created On	_
			To add a product, click th	re "Add Product" button be	ow.		

2. On the Available Products screen, select Underwriting Request.



3. The highlighted data will pre-populate the **Closing Protection Letter** screen from the ProForm Order.

Additional options are available to be selected as needed. Once all selections have been made, click **Next**.

nderwriter Request		First American
Est. Closing Date :	7/28/2023	
Max. Liability Amount :	\$650,000.00	
Transaction Type :	Purchase ~	
Mortgage Modification :	No v	
Multisite :	No v	
Current Use of Land :	1-4 Residential V	
Survey :	No ~	Survey Date :
Income time is	No v	Inspection Date :

- 4. The **Over Limit/Other Request** screen displays areas to either:
 - a. Request Over Underwriting Limit
 - b. Other Requests (CPL Modification, MLRA, Special Pricing, etc.)

The **Add to ProForm Notes** check box, when checked, will write any notes type in the boxes back to the ProForm Order in the Notes section.

Note: The Request Over Underwriting Limit checkbox is check by default. Check or uncheck the boxes needed.

Click Next.

MagentNet - Underwriter Request - CDF23-00789-NJ	
Over Limit/Other Request	First American Title™
Over Underwriting Limit or Considered High Liability Rick Definition: If the Estimated Total Liability amount is more than your authority limit. Ple information with relevant details	ase specify all relevant
Other Requests (CPL Modification, MLRA, Special Pricing, etc.) Please enter the details of your request below or upload a document with the details of your	r request
Beck	xt <u>Cancel</u>

5. The Proposed Policies and Endorsements screen transmits anticipated policy, policy coverage and proposed endorsements to the Underwriter to support any Underwriting requests.

Select the appropriate items from the drop-down fields.

The Exceptions deleted from policy hyperlink will transmit any notes on the removal of any exceptions. Enter the appropriate data and click **OK**.

Endorsement information can be added to a Policy(ies). The Add this Policy button will not become active unless there is a Policy Type and Liability Amount entered on this screen.

Once a policy is entered, check off the appropriate endorsements utilizing the Select check box(es) then click Add this Policy.

Once an endorsement is added to a policy, the endorsement can be changed or removed utilizing the Edit or Delete hyperlink options.

Click Next to continue.



	Policies and Endorsements
WF	ile not required, adding proposed policies and endorsements will expedite the decisioning process'
Policy Type :	-Select- V Liability Amounts :Select-
Name of Insure	d : Nationwide Mortgage Estate/Interest : D Fee Lease Other
Exception dele	sted from policy
Select	Endorsement Name *
	NJRB 5-01 Survey Endorsement
	NJRB 5-10 Special Construction Loan
	NJRB 5-11 (ALTA 6.1) Variable Rate Mortgage
	NJRB 5-18 Arbitration
	Add this Policy
	Amount Estate/Interest
Policy Name	

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	NJRB 5-10 Specia										
	NJRB 5-11 (ALTA										
	NJRB 5-18 Arbitra										~
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Policy Name					-		_			_	
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6. From the Add Document(s) screen:

The **Browse** will open the file browser on the PC or virtual machine.

The **Attachment** button list any documents saved within the ProForm order in the Attachment area.

The **ReadyDoc** button will not populate anything at this time.

7. Once a document has been added:

The **Document Type** must be selecting to move forward.

The name of the document can be changed utilizing the **Rename** button. Name changes made in this window to do **NOT** push back to the ProForm order or from the Browser location.

Any document added in error can be removed using the **Delete** button.

Click Next.

 The Contact and Approver screen populates the name and email address of the Contact. The fields are auto populated based on the initial login. These fields can be over written. Changes made in this window to do NOT push back to the ProForm order.

The **Underwriting Approver** lists the names of the specific approvers. Select from the drop-down list.

Click Submit to proceed.

9. In the **360 queue**, the Underwriter Request will display **In Progress** until the status changes to **Ready**.

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