CATIC
Closing Protection Letter
User Guide

August, 2024

Copyright and Licensing Information

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History

Date	Version	Details
August, 2024	1.0	Original Release

Introduction

The CATIC integration with SoftPro 360 will allow you to seamlessly order CATIC Closing Protection Letters (CPLs) within ProForm. SoftPro 360 will be able to create a CATIC file corresponding to information in your ProForm order and enable you to order CPLs through CATIC. Additionally, you'll be able to void a CPL. All of this can be done without having to leave your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Accessing

From the ProForm toolbar:

1. Select the Services tab
2. Click the Underwriter Services folder to expand
3. Double-click **CATIC – Jacket/CPL/Title Services**
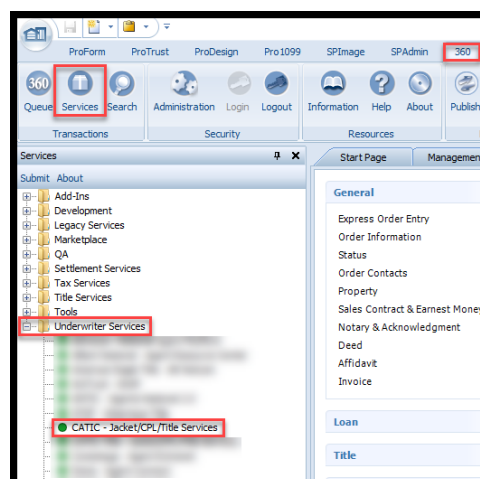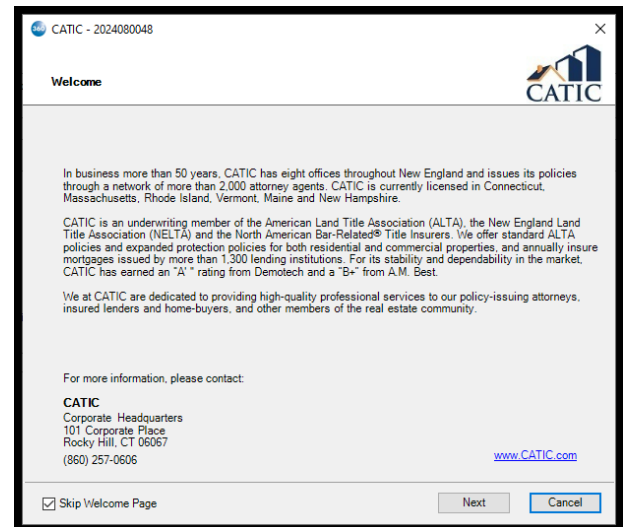
Select a ProForm Order

Each transaction must be linked to a ProForm Order. If you already have a ProForm order(s) open, the Active order will be automatically linked. If you do not have an active order open, you can enter the order number in the Selected Order Number field. Once you have confirmed the order, click OK.
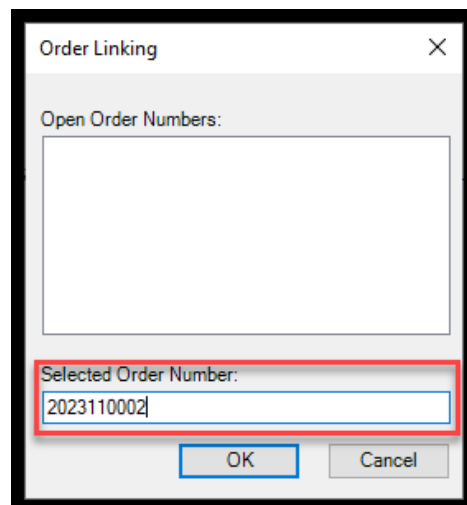
Logging into CATIC

The Welcome Screen provides information about CATIC Title. By Clicking on the **'Skip Welcome Page'** check box, it will allow you to bypass the Welcome screen when launched in future sessions. Click the **Next** button to continue.

The **Login** screen requires the user to enter a valid **Username** and **Password**. Clicking on the **'Remember me'** check box will allow you to bypass the log in screen when you launch the product in future sessions.

Click the **Next** button to continue to the **Title Services** screen.

Click the **Cancel** button to exit the integration.

Title Services Screen

From the **Title Services** screen, the following features are available:

- View a list of the products that have been ordered from CATIC.
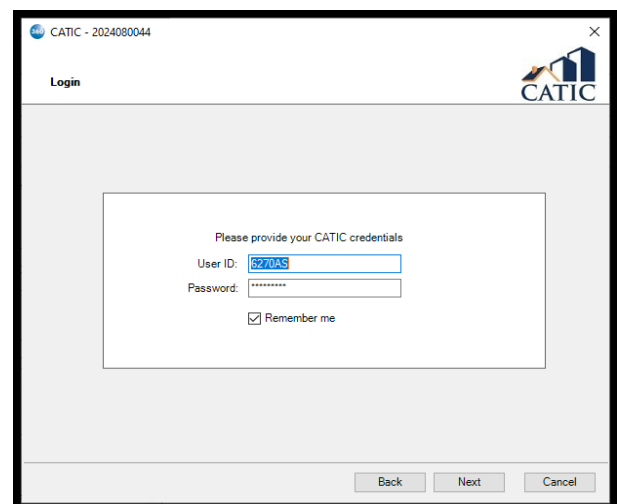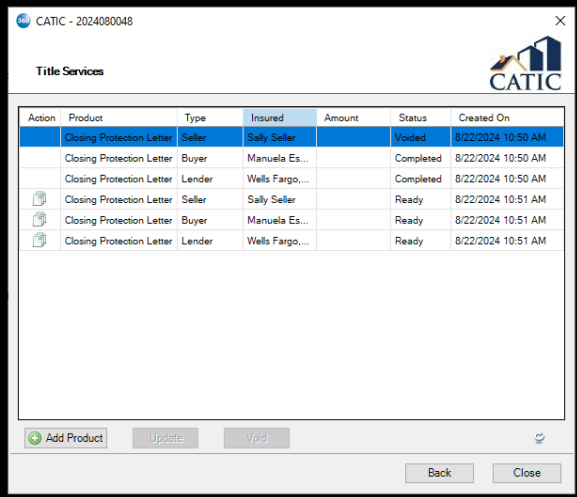- **Add Product:** Selecting the **Add Product** button allows the user to select the CPL product.
- **Update:** Selecting **Update** allows the user to edit the existing CPL product.
- **Void:** Selecting **Void** allows the user to void the existing CPL product.

Table Details:

- The columns in the **Title Services** screen provide the following information:
  - **Action**:
    - **Paper Icon** : The product has not been attached to the order (**Status** = **Ready**). Clicking the icon will navigate you back to the **Review** screen of the product where you will be able to **Accept** it and attach it to your order.
    - **Red Question Mark** : The transaction encountered an error and the transmission could not be completed (**Status** = **Rejected**). You can hover over the question mark or double-click it to view a description of the error.
    - **No icon displayed**: The product has been voided (**Status** = **Voided**) or it has been attached to the order (**Status** = **Completed**).

  - **Product**: The type of product requested from CATIC. For CPLs, the value will always be **Closing Protection Letter**.
  - **Type**: For CPLs, the values could be **Buyer**, **Seller**, or **Lender**.
  - **Insured:** For CPLs, the value will reflect the name of the individual or entity covered by the CPL.
  - **Amount**: For CPLs, the value will be blank.
  - **Status:**
    - **Ready:** The product was successfully generated by CATIC and received by 360 but it has not been attached to the order.
    - **Completed:** The product was successfully generated, received by 360, and attached to the order.
    - **Rejected:** An error occurred with the transmission of the transaction.
    - **Voided:** The transaction for a product was canceled/voided in CATIC.
  - **Created On:** Date and time stamp of when the product was initially generated.

- To **Sort** the data in the table by columns, click on a column heading (except for the **Action** header). Click once to sort in ascending order and again to sort in descending order.

Click **Back** to navigate to the **Login** screen.

Click **Close** to exit the integration.

CPL Information Screen

The **CPL Information** screen allows the user to select the **Property** and **Branch** to be associated with the CPL. The information for the property displayed in the **CPL Information** screen can be modified, however any modifications made will not overwrite the ProForm order.

- **Agent:** The **Agent** field will populate from CATIC based upon the login credentials used to access the integration.
- **Branch:** The **Branch** dropdown allows the user to select the Branch to associate with the CPL.
- **Property:** The **Property** dropdown will be used to select the **Property** from the ProForm to be associated with the CPL. The dropdown will default to the first **Property** listed in the ProForm order.
- **Address 1:** Reflects the **Address 1** field in the ProForm order based on the property selected in the **Property** dropdown.
- **Address 2:** Reflects the **Address 2** field in the ProForm order based on the property selected in the **Property** dropdown.
- **City:** Reflects the **City** field in the ProForm order based on the property selected in the **Property** dropdown.
- **State:** Reflects the **State** field in the ProForm order based on the property selected in the **Property** dropdown.
- **Zip:** Reflects the **Zip Code** field in the ProForm order based on the property selected in the **Property** dropdown.
- **Approved Attorney:** The **Approved Attorney** dropdown will be used to select the **Approved Attorney** to be associated with the CPL.

Click **Next** to navigate to the **Letter Selection** screen.

Click **Cancel** to navigate to the **Title Services** screen.

Letter Selection Screen

The **Letter Selection** screen allows the user to select the **Covered Party** to be associated with the CPL. When **Lender** is selected, use the **Loan Dropdown** to select the loan to be associated with the CPL. The **Loan Dropdown** will default to the first loan in ProForm.

Information Screen

The **Information** screen allows the user to verify and edit the information of the contact(s) to be associated with the CPL. The information for the contact(s) displayed in the **Information** screen can be modified, however any modifications made will not overwrite the ProForm order.

Lender:

- **Borrower Name:** Reflects the **Borrower Name(s)** from the buyer/borrower contact(s) in ProForm.
- **Lender Name:** Reflects the **Lender Name** from the lender contact in ProForm.
- **Address 1:** Reflects the **Address 1** field from the lender contact in ProForm.
- **Address 2:** Reflects the **Address 2** field from the lender contact in ProForm.
- **City:** Reflects the **City** field from the lender contact in ProForm.
- **State:** Reflects the **State** field from the lender contact in ProForm.
- **Zip:** Reflects the **Zip Code** field from the lender contact in ProForm.
- **Attention:** Allows the user to the name of the individual who will be receiving the CPL.
- **Successor Language:** Reflects the **Proposed Insured Clause** field from the lender contact in ProForm.

Buyer:

- Name: Reflects the **Buyer Name(s)** from the buyer/borrower contact(s) in ProForm.
- Address 1: Reflects the **Address 1** field from the buyer/borrower contact in ProForm.
- Address 2: Reflects the **Address 2** field from the buyer/borrower contact in ProForm.

- City: Reflects the **City** field from the buyer/borrower contact in ProForm.
- State: Reflects the **State** field from the buyer/borrower contact in ProForm.
- Zip: Reflects the **Zip Code** field from the buyer/borrower contact in ProForm.

Seller:

- Name: Reflects the **Seller Name(s)** from the seller contact(s) in ProForm.
- Address 1: Reflects the **Address 1** field from the seller contact in ProForm.
- Address 2: Reflects the **Address 2** field from the seller contact in ProForm.
- City: Reflects the **City** field from the seller contact in ProForm.
- State: Reflects the **State** field from the seller contact in ProForm.
- Zip: Reflects the **Zip Code** field from the seller contact in ProForm.

Click **Back** to navigate to the **Letter Selection** screen.

Click **Submit** to send the CPL request to CATIC.

Click **Cancel** to navigate to the **Title Services** screen.

Review CPL Screen

The **Review CPL** screen allows the user to View, Copy and Accept the CPL product(s) into the proform order.

- The columns in the Review CPL screen provide the following information:
  - To view the CPL, click the **PDF icon** in the **View** column.
  - To copy the contents of the document to your clipboard, click the **document icon** in the **Copy** column.
  - The CPL will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
    - CATIC_CPL_*{CPL Number}_{YYYYMMDD}*
      Example: **CATIC_CPL_00003168_20161012**
  - The **Review CPL** screen also displays the **File Size** and percentage of the file that was **Transferred** from CATIC.
  - Click **Accept** to attach the CPL to your order. You will automatically return to the **Title Services** screen and the CPL will have a status of **Completed**.
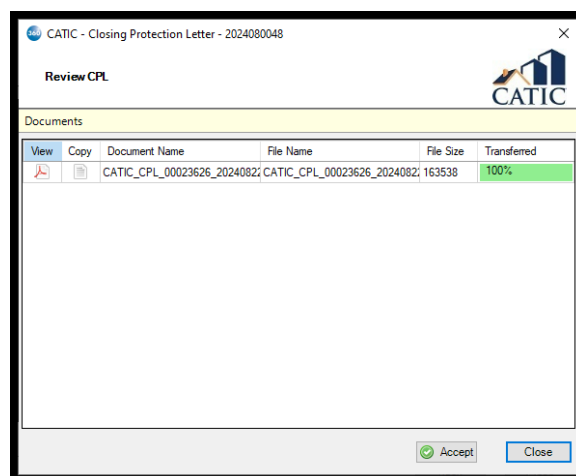
If you **Close** without attaching your order, you will return to the **Title Services** screen and the CPL will have a status of **Ready**.