

CATIC Policy Jacket User Guide

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History

Date	Version	Details
August, 2024	1.0	Original Release

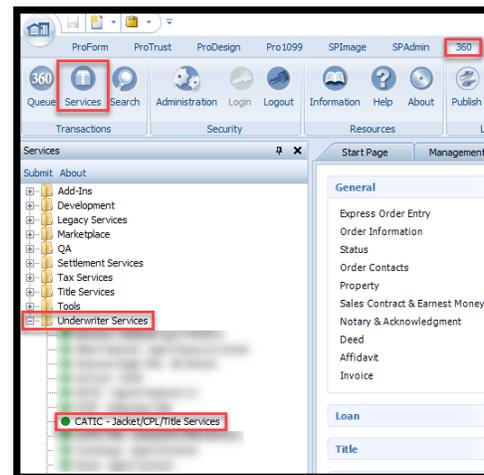
Introduction

The CATIC integration with SoftPro 360 will allow you to seamlessly order CATIC Policy Jackets within ProForm. SoftPro 360 will be able to create a CATIC file corresponding to information in your ProForm order and enable you to order Policy Jackets through CATIC. Additionally, you'll be able to void a Policy Jacket. 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

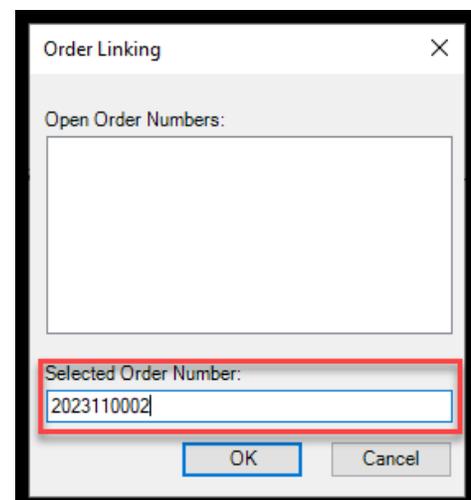
From the ProForm toolbar:

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



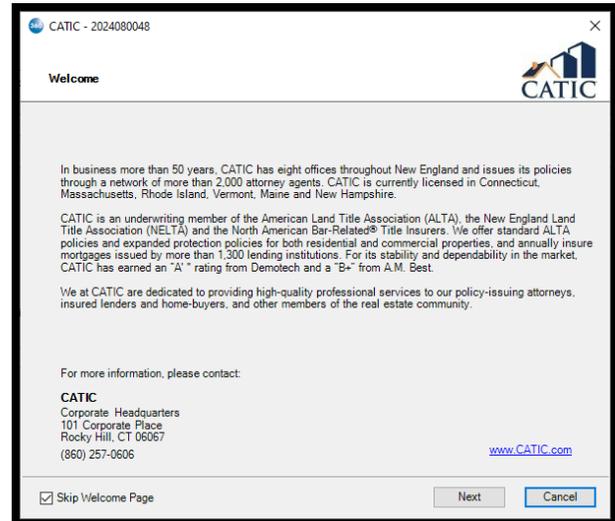
Select a ProForm Order

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

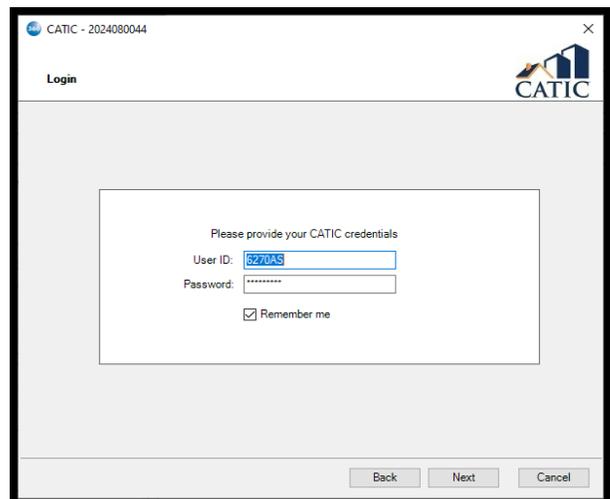
The Welcome Screen provides information about CATIC Title. By Clicking on the **'Skip Welcome Page'** check box, it will allow you to bypass the log in screen when launched in future sessions.



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.

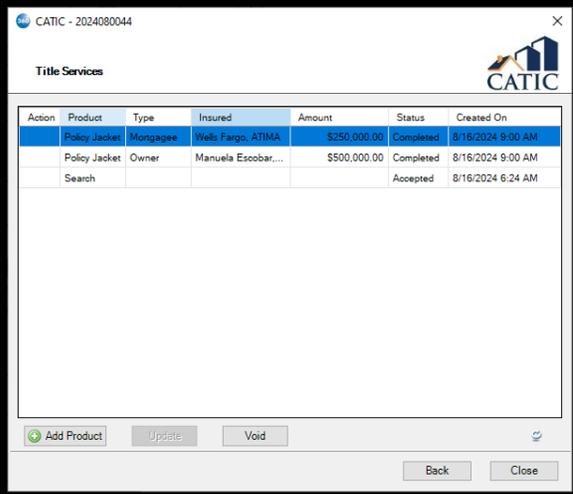
Click the **Cancel** button to exit the integration.



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 Policy Jacket product.
- **Update:** **Update** is not available for the Policy Jacket product.
- **Void:** Allows the user to **Void** the Policy Jacket product.



The screenshot shows the CATIC Title Services interface. At the top, it displays 'CATIC - 2024080044' and the CATIC logo. Below the header is a table with the following data:

Action	Product	Type	Insured	Amount	Status	Created On
	Policy Jacket	Mortgagee	Wells Fargo, ATIMA	\$250,000.00	Completed	8/16/2024 9:00 AM
	Policy Jacket	Owner	Manuela Escobar...	\$500,000.00	Completed	8/16/2024 9:00 AM
	Search				Accepted	8/16/2024 6:24 AM

Below the table, there are three buttons: 'Add Product' (with a plus icon), 'Update', and 'Void'. At the bottom right, there are 'Back' and 'Close' buttons.

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 Policy Jackets, the value will always be **Policy Jacket**.
 - **Type:** For Policy Jackets, the values could be **Owner**, **Mortgagee**, or **Commitment**.
 - **Insured:** For Policy Jackets, the value will reflect the name of the individual or entity covered by the Policy Jacket.
 - **Amount:** For Policy Jackets, the value will reflect the coverage amount of the type of Policy Jacket selected.
 - **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 Policy Jacket 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 **Next** to navigate to the **Order Information** screen.

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

Order Information Screen

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

- **Property:** The **Property** dropdown will be used to select the **Property** from the ProForm to be associated with the Policy Jacket. The dropdown will default to the first **Property** listed in the ProForm order.
- **Property Type:** Reflects the **Property Type** 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.
- **Agent:** The **Agent** field will populate from CATIC based upon the login credentials used to access the integration.

The screenshot shows a web form titled "Order Information" with the CATIC logo in the top right corner. The form fields are as follows:

- Property: 217 Vassar Circle, Miami, FL 33101
- Property Type: Residential 1-4 Family Dwelling
- Address 1: 217 Vassar Circle
- Address 2: (empty)
- City: Miami
- State: FL
- Zip: 33101
- Agent: --Select--
- Branch: (empty)
- Estimated Closing Date: (empty)

At the bottom right, there are two buttons: "Next" and "Cancel".

- **Branch:** The **Branch** dropdown allows the user to select the Branch to associate with the Policy Jacket.
- **Estimated Closing Date:** Reflects the **Estimated Closing Date** in the ProForm order.

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

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

Jacket Selection Screen

The Jacket Selection screen allows the user to select the type of Policy Jacket(s) to issue for the selected property.

- **Simultaneous:** The **Simultaneous** option can be used to issue both an Owner's and Mortgagee Policy Jackets.
- **Owner:** The **Owner** option can be used to issue an Owner's Policy Jacket.
- **Mortgagee:** The **Mortgagee** option can be used to issue a Loan Policy Jacket.



Click **Next** to navigate to the **Policy Information** screen.

Click **Back** to navigate to the **Order Information** screen.

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

Policy Information Screen

The **Policy Information** screen allows the user to select the **Policy Type**, **Policy Amount**, **Coverage Type**, and the **Insured/Owner** for the Owner's Policy. For the Mortgagee Policy, the user will be able to select the **Policy Type**, **Policy Amount**, **Loan**, **Coverage Type**, **Borrower/Owner**, and **Lender**. The information displayed in the **Policy Information** screen can be modified, however any modifications made will not overwrite the ProForm order.

Mortgagee and Owner Policies:

- **Policy Type:** Will be used to select the **Policy Type** that is offered by CATIC for either Policy.
- **Policy Amount:** Reflects the **Coverage Amount** of the Owner's or Loan Policy in the ProForm order.
- **Coverage Type:** Will be used to select the **Coverage Type** that can be issued with the Policy issued by CATIC.

Owner Policy:

- **Insured/Owner:** Reflects the name(s) of the Sellers contact in the ProForm order.

Mortgagee Policy:

- **Borrower/Owner:** Reflects the name of the **Borrower/Buyer** contact in the ProForm order.
- **Lender:** Reflects the name of the **Lender** contact in the ProForm order.
- **Address 1:** Reflects the **Address 1** line of the Lender contact in the ProForm order.
- **Address 2:** Reflects the **Address 2** line of the Lender contact in the ProForm order.
- **City:** Reflects the **City** line of the Lender contact in the ProForm order.
- **State:** Reflects the **State** line of the Lender contact in the ProForm order.
- **Zip:** Reflects the **Zip Code** line of the Lender contact in the ProForm order.

Click **Submit** to send the order to CATIC. If successful, the user will navigate to the **Review Jacket** screen.

Click **Back** to return to the **Order Information** screen.

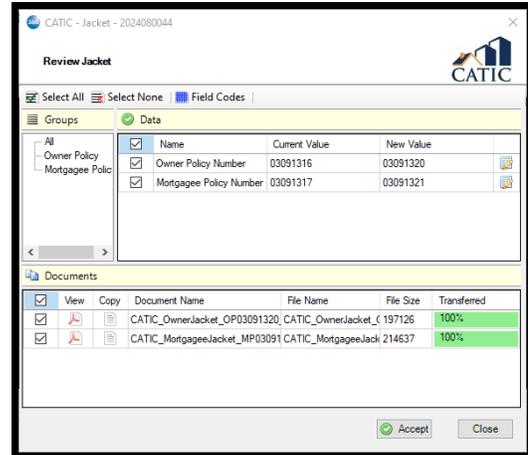
Click **Cancel** to return to the **Title Services** screen.

Review Jacket Screen

After the data you've entered is sent to CATIC and the submission is successful, the **Review Jacket** screen will allow you to access the Policy Jacket that was generated.

Data Section:

- The top section of the **Review Jacket** screen displays the following information:
 - **Current Value:** The policy number of the last jacket that was created for the order. This number is currently populated in the order.
 - **New Value:** The policy number of the new jacket that was just generated by CATIC and is accessible in the **Documents** section of the **Review Jacket** screen.
- Clicking **Accept** will overwrite the policy number in the **Current Value** with the **New Value** in the order. If you uncheck the box next to the policy number entry and click **Accept**, then it will *not* be overwritten.
- Clicking **Close** instead of **Accept** will also prevent the policy number from being overwritten and retain the **Current Value** in the order.



Documents Section:

- To view the Policy Jacket, 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 Policy Jacket will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
 - `CATIC_{Jacket Type}_{Jacket Number}_{YYYYMMDD}`
Example: **CATIC_MortgageeJacket_MP00003168_20161012**
- The **Review Jacket** screen also displays the **File Size** and percentage of the file that was **Transferred** from CATIC.
- Click **Accept** to attach the Policy Jacket to your order. You will automatically return to the **Title Services** screen and the Policy Jacket will have a status of **Completed**.
 - **NOTE:** If you uncheck the box next to the policy jacket entry but the box next to the corresponding policy number in the Data section is checked, the policy jacket will still be attached to your order when you click **Accept**.

If you **Close** without attaching your order, you will return to the **Title Services** screen and the Jacket will have a status of **Ready**.