

CATIC Title Search User Guide

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Table of Contents

Introduction	4
Accessing	4
Select a ProForm Order for Your Search	4
Logging into CATIC	4
Title Services Screen.....	5
Property Information Screen	5
Search Request Screen.....	5
Additional Products Screen	6
Add Documents Screen	7
Accepting Data & Document(s).....	7
Review Screen	7
Bringdown Request.....	8
Accepting Bringdown Data & Document(s)	8
Review Screen for Bringdown Responses	9

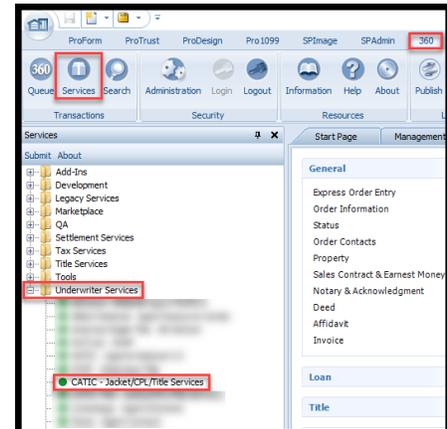
Introduction

CATIC allows users to order Title Search products via SoftPro 360. The CATIC integration with Softpro 360 provides users with the ability to seamlessly place orders for CATIC Products.

Accessing

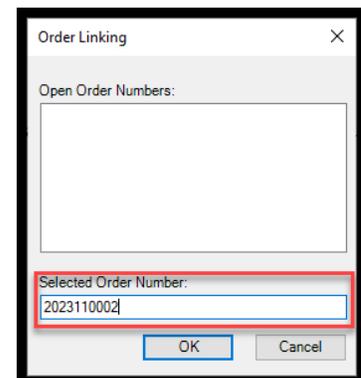
From the ProForm toolbar:

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



Select a ProForm Order for Your Search

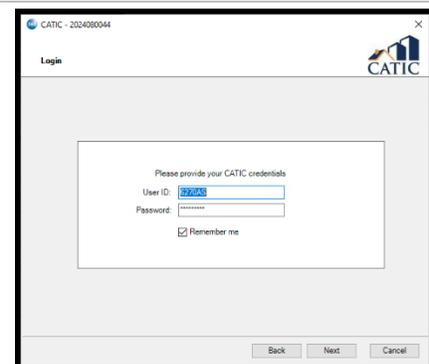
Each transaction must be linked to a ProForm Order. If you already have ProForm order(s) open, the Active order will be automatically linked. If you do not have an active order open, you can enter the order number in the Selected Order Number field. Once you have confirmed the order, click OK.



Logging into CATIC

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

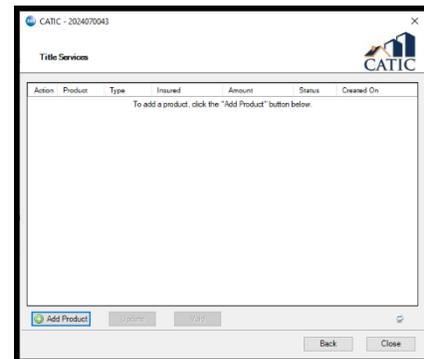
Clicking the **Next** button will continue to the **Title Services** screen.



Title Services Screen

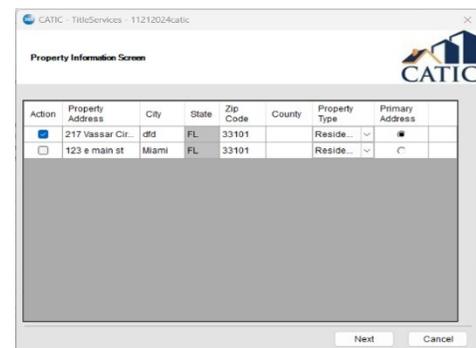
From the **Title Services** screen, the following features are available:

- 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 Title Search product.
- **Update:** Selecting the **Update** button allows users to request an update to a previously submitted Title Search request.
- **Void: Void** is not available for the title search product.



Property Information Screen

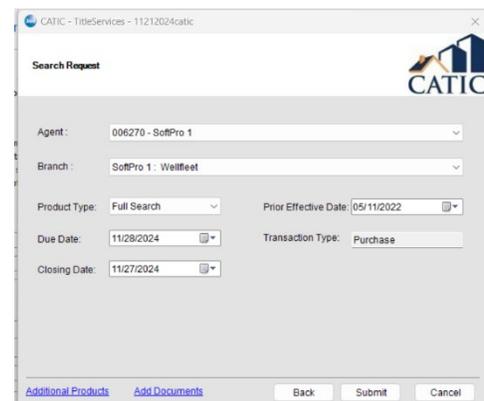
The **Property Information** screen allows the user to select the Property(s), Property Type, Product Type, and if which address is considered the Primary Address.



Search Request Screen

The **Search Request** screen allows the user to select the **Agent, Branch, Product Type, Prior Policy Effective Date, Due Date, Transaction Type,** and **Closing Date**. The screen will also allow users to add **Supporting Documentation** and request **Additional Products**.

- **Agent:** The **Agent** drop down allows the user to select the Agent to associate with the Title Search order.
- **Branch:** The **Branch** dropdown allows the user to select the Branch to associate with the Title Search order.
- **Property Type:** The selection for the **Property Type** added within the ProForm order will populate into the field.



- Changes to the **Property Type** can be done within the CATIC integration but will not overwrite the ProForm order.
- **Product Type:** The **Product Type** dropdown will be used to select the type of search to be requested.
- **Prior Effective Date:** Information for the **Prior Effective Date** added within the ProForm order will populate into the field.
 - Changes to the **Prior Effective Date** can be done within the CATIC integration but will not overwrite the ProForm order.
 - **The prior effective date is only required for the Vermont Post Closing Search Orders.**
- **Due Date:** Information for the order **Due Date** added within the ProForm order will populate into the field.
 - Changes to the order **Due Date** can be done within the CATIC integration but will not overwrite the ProForm order.
- **Transaction Type:** Information for the **Transaction Type** added within the ProForm order will populate into the field.
 - Changes to the order **Transaction Type** can be done within the CATIC integration but will not overwrite the ProForm order.
- **Closing Date:** Information for the order **Closing Date** added within the ProForm order will populate into the field.
 - Changes to the order **Closing Date** can be done within the CATIC integration but will not overwrite the ProForm order.
- **Additional Products:** The **Additional Products** link will open the **Additional Products** and Information screen.
- **Add Documents:** The **Add Documents** link will open the **Add Documents** screen.

Additional Products Screen

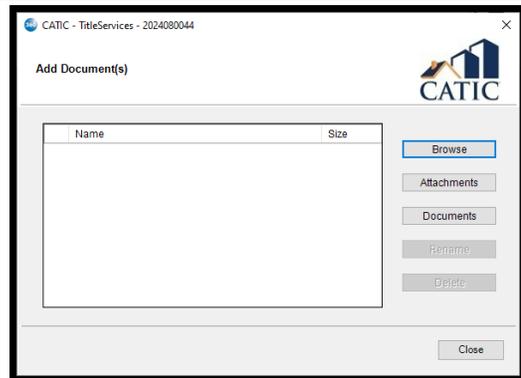
The **Additional Products** screen allows the user to select additional **Municipal Searches**, add **Additional Instructions**, and add the **Additional Instructions** to the notes in the ProForm order. After selecting additional product(s), click Close.

- **Municipal Search Type:** The **Municipal Search Type** dropdown additional municipal searches for the property in the request.
- **Additional Instructions:** The **Additional Instructions** text box allows the user to manually enter any **Additional Instructions** needed for the request. The **Additional Instructions** can be added to the ProForm notes when the checkbox is checked.

Add Documents Screen

The **Add Document(s)** screen allows the user to attach documents before submitting the request to CATIC. After selecting documents, click **Close**.

- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **Documents:** This button is not applicable to CATIC transactions at this time.
- **Rename:** Rename the documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting.



Accepting Data & Document(s)

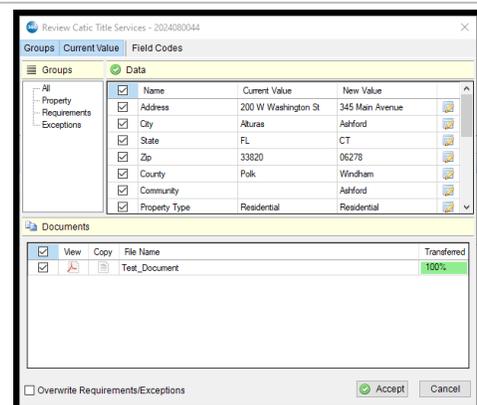
In the 360 queue the transaction status will show as 'Ready' when data and documents have been sent from CATIC. The transaction status will be 'Ready' which indicates a response has been received and is ready to be reviewed. The user will click 'Next Step' to review the data and documents.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Category	Description	Transaction Number
CATIC	TitleServices	Ready	2024080044	Default	Alex Drake	8/16/2024 4:...	Underwriter...		410050-40-240816-397715

Review Screen

The **Review** screen allows the user to **View**, **Copy**, and **Accept** documents from CATIC into the ProForm order.

- **View:** View documents sent from CATIC.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.
- **Overwrite Requirements/Exceptions:** When this option is checked, requirements and exceptions saved to the ProForm order will be removed and only the latest requirements and exceptions will be added to the ProForm order.



The accepted documents will be saved in the attachments section of the ProForm order.

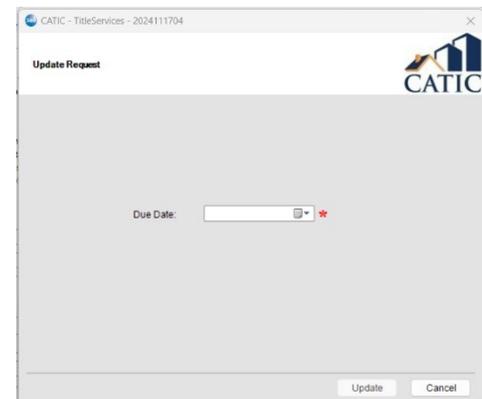
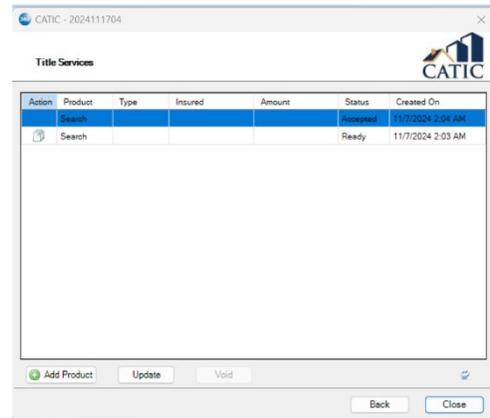
Bringdown Request

From the **360 Queue** users can request a Bringdown for a transaction that has already been **Accepted**.



Next Step	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description	Transaction Number
Next Step	Doma	Title Search	Accepted	DomaSearch - ...	Default		8/31/2023 12:56 PM			9835 St Marg...	410060-70-230831-168...

1. Highlight the corresponding transaction.
2. Click the **Next Step** button to open the **Title Services** screen.
 - Select the Accepted Title Search you would like to order a Bring down request for.
3. Click the **Update** button on the Title Services screen with the corresponding product highlighted to open the **Update Request** screen.
4. New Due Date is required. Click Update button, then the transaction **Status** updates to **In Progress** in the **360 Queue**. Clicking the **Cancel** button will return you to the **360 Queue** without requesting the bringdown



Accepting Bringdown Data & Document(s)

In the **360 Queue** the transaction **Status** is updated to show as **Ready** when Bringdown data and documents have been sent from Doma. This indicates a response has been received and is ready to be reviewed. CATIC will send the complete search data set and attached documents as part of the Bringdown response.

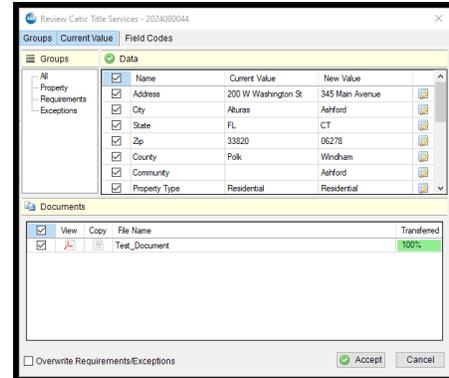
With the corresponding transaction highlighted, click the **Next step** button to review the data and documents.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Category	Description	Transaction Number
CATIC	TitleServices	Ready	2024080044	Default	Alex Drake	8/16/2024 4:...	Underwriter...		410060-40-240816-397715

Review Screen for Bringdown Responses

The **Review** screen allows the user to **View**, **Copy**, and **Accept** documents from CATIC into the ProForm order.

- **View:** View documents sent from CATIC.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.
- **Overwrite Requirements/Exceptions:** When this option is checked, requirements and exceptions saved to the ProForm order will be removed and only the latest requirements and exceptions will be added to the ProForm order.



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