

Old Republic Policy Jacket User Guide

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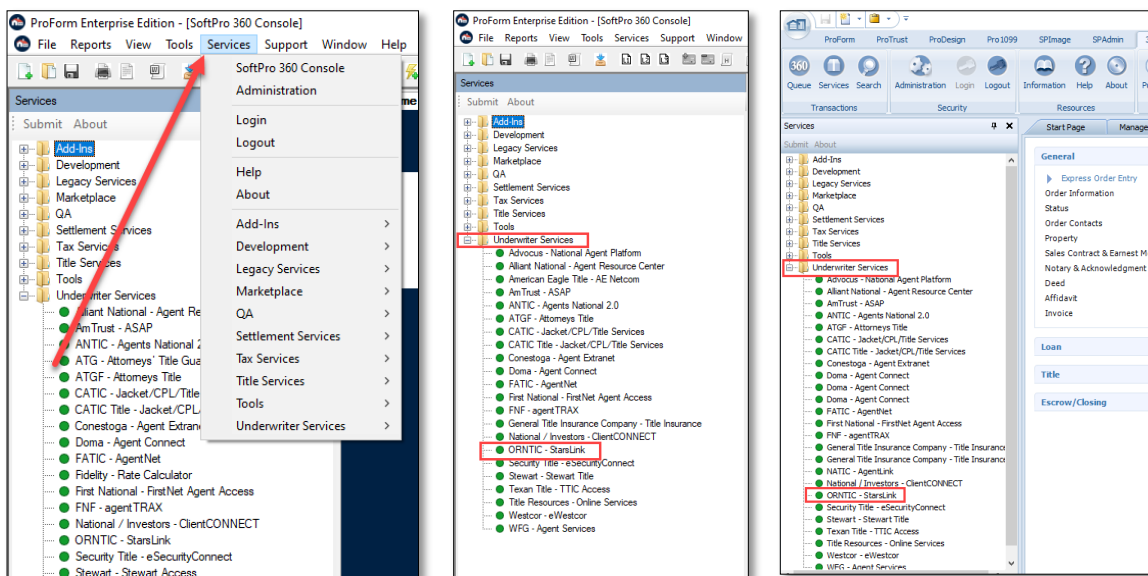
Introduction

The Old Republic integration with SoftPro 360 will allow ordering of Old Republic products using the data within ProForm. SoftPro 360 will be able to create an Old Republic file corresponding to information in the ProForm order and enable ordering Policy Jackets along with CPLs through Old Republic. Additionally, users can update and void existing CPLs and Jacket. All available without having to leave the SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

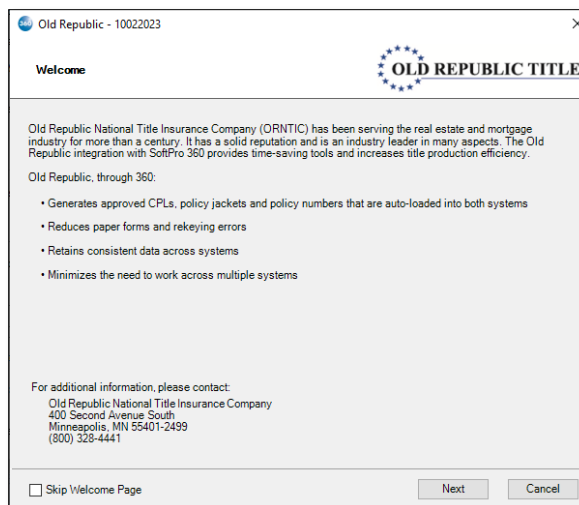
Accessing Old Republic

From the Select toolbar:

1. Select the Services tab.
2. Click the Underwriter Services folder to expand.
3. Double-click **Old Republic**.



- The Welcome screen appears providing information on the Old Republic Integration.
- The **Skip Welcome Screen** checkbox will prevent the Welcome screen from being shown in the future when opening Old Republic.
- Click the **Cancel** button to exit the Old Republic process.
- Click the **Next** to launch the Old Republic integration.

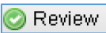



Title Services Screen

From the **Summary** screen, the following features are available:

- View a list of the CPLs and/or Policy Jackets that have been ordered.
- Order a CPL or Jacket.
- Void and issued product.
- View order data that has been sent to Old Republic.
- A table will display the products ordered from Old Republic and will provide the following information for each CPL and Jacket:

Action:

-  **Review**: 360 has received the CPL or Jacket from Old Republic (**Status = Ready**) and it is ready for the user to review and accept. Clicking the icon will display the **Review** screen, available options are review and accept the product.
- **Red Exclamation Mark** : The request submitted to Old Republic encountered an error and no product was created. Hover over the exclamation mark or double-click it to view a description of the error.

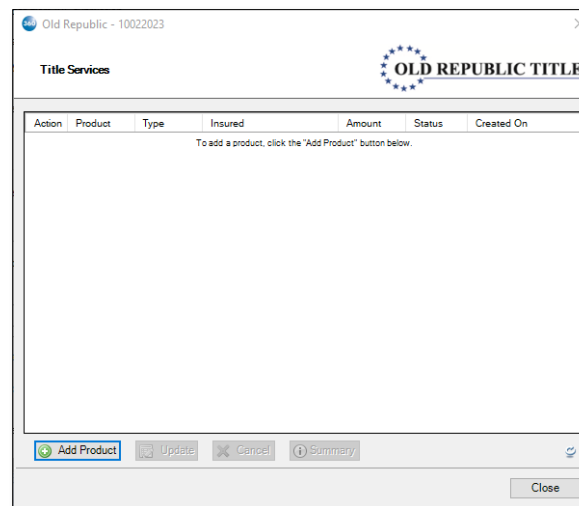
Product: The type of product requested from Old Republic. For CPLs, the value will always be **Closing Protection Letter**. For Jackets, the value will always be **Policy Jacket**.

Type: Displays the type of product ordered. If Policy Jacket is requested, it will display the type of Jacket requested.

Insured: Property Address

Amount: Liability amount will appear for the policy jackets only.

Status:



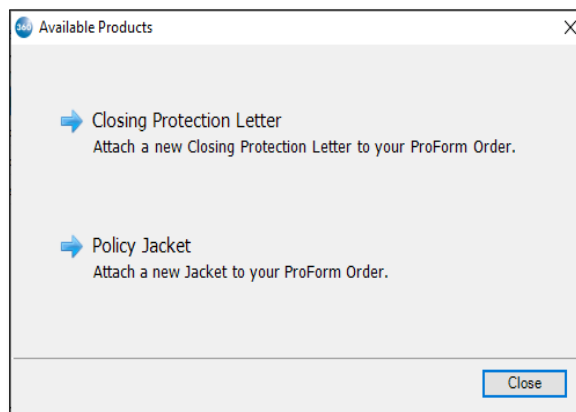
- **Ready:** 360 has received the remitted document from Old Republic and is ready for review and accept (attach to the order).
- **Completed:** The remitted product was accepted and attached to the order.
- **Rejected:** An error occurred with the submission of the request.
- **Canceled:** The product was voided.

Created On: Date and time stamp of when the product was generated.

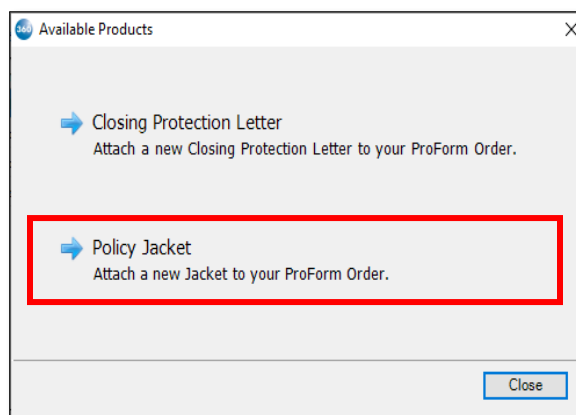
- To **sort** the data, click on a column heading. Click once to sort in ascending order and click again to sort in descending order.
- The **Add Product** button is available to order a CPL or Jacket, respectively.
- To **update** an issued product, highlight a transaction that is in **Completed** status and click the **Update** button.
- To **cancel** an issued product, highlight a transaction that is in **Completed** status and click the **Cancel** button.
- To view the order data that we are sending to Old Republic, click the File Information screen.

Available Products Screen

- Select **Closing Protection Letter** to navigate you to the **Login** screen.
- Select **Policy Jacket** to navigate you to the **Property Information** screen.
- Click **Close** to return to the **Summary** Screen.



Requesting a Policy



Logging into Old Republic

- The **Login** screen requires to enter a valid Old Republic username and password.
- Check the “**Remember Me**” to login automatically when the Old Republic product launches in future sessions.
- Click **Login** to enter to the Old Republic Integration.
- Click **Back** to return to the **Welcome** Screen.
- Click **Cancel** to exit the Old Republic Integration.

Agent Selection

- If multiple agents are returned Old Republic, the Agent Selection screen will show a list of available accounts.
- Select the account to send with the product request.
- Click **Next** to continue to the **Property Information** screen.
- Click **Back** to return to the **Login** Screen.
- Click **Close** to exit the Old Republic Integration.

Company	Underwriter
OLD REPUBLIC TITLE RESIDENTIAL INFO. SERVICES	ORNTIC
OTHER AGENTS PLAN	ORNTIC
OLD REPUBLIC TITLE RESIDENTIAL INFO. SERVICES	ORNTIC

Selected Company/Underwriter:
 ORNTIC
 OLD REPUBLIC TITLE RESIDENTIAL INFO. SERVICES
 SUITE 1061530 SOUTH MAIN STREET
 AKRON, OH 44311

Property Information Screen

- After Policy Jacket is selected, the **Property Information** screen is displayed.
- Address
 - This will display the first property in the ProForm Order.
- County
 - This will display counties in the property state
 - The values are returned from Old Republic, it will default to blank.
 - Required
- Property Type
 - This will display property types returned from Old Republic and will default to blank.
 - Required
- Effective Date
 - To display 1st policy effective date listed in the ProForm Order.
 - Required
- Buyer
 - This will display all buyer/borrower separated by and.
- Click **Next** to continue to the **Deal Selection** screen.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Login** screen.

Old Republic Jacket - 10022023

Property Information

OLD REPUBLIC TITLE

Address: 2083 Orchard Lakes Place
Toledo, NC 43615

County: *

Property Type: *

Effective Date: *

Buyer: Ginny Weasley and Henry Weasley

Back Next Cancel

Deal Selection Screen

The Deal Selection screen will allow you to choose from Simultaneous Policy (Lender, Additional Lender, Owner), Lender Policy (if you have multiple loans, they will be available in the drop-down box) or Owner Policy.

This policy selection will default to the policy type in the linked ProForm order.

- Click **Next** to continue.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Property Information** screen.

Old Republic Jacket - 10022023

Deal Selection

OLD REPUBLIC TITLE

Select the type of policy(s) to be issued:

☐ Simultaneous Policy

☒ Lender

☐ Additional Lender

☐ Owner

☒ Lender Policy

☐ Owner Policy

Back Next Cancel

Policy Selection Screen

The Policy Selection screen will allow you to select the type of Jacket available. The options provided are based on your Old Republic account. To narrow the policy selection, the list may be filtered using the filters given.

- Click **Next** to continue.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Deal Selection** screen.

Old Republic Jacket - 10022023

Lender Policy Selection

Filter: All

- JUNIOR LOAN POLICY JLP PRODUCT
- LIMITED RESIDENTIAL MORTGAGE MODIFICATION
- LOAN - BASIC - LONG FORM
- LOAN - BASIC - SHORT FORM
- LOAN - EXPANDED
- LOAN - EXPANDED - REISSUE
- LOAN - REISSUE - LONG FORM
- LOAN - REISSUE - SHORT FORM
- MORTGAGE PRIORITY GUARANTEE
- STAND ALONE ENDORSEMENT

Back Next Cancel

Policy Information Screen

Based on the type of jacket you select; the Policy Information screen will display applicable information from your ProForm order. This screen will allow you to enter the Insurance and Discount amounts associated with the policy selected. Also based on the jacket selection, you may need to select endorsements to associate with the jacket. Click Next to continue.

- Click **Next** to continue.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Policy Selection** screen.

Old Republic Jacket - 10022023

Lender Policy Information

JUNIOR LOAN POLICY JLP PRODUCT

Name	Value
Insurance	12,345,665.00
Prior Policy Amount	0.00

Notes

Click on the Add Endorsement button to add the Commitment Fee.
 NC is a filed-rate state. The only filed rates for Endorsements are for the issuance of the ALTA 5, ALTA 8.1 and ALTA 9 when issued in connection with a residential transaction. There are no filed rates for Endorsements issued in connection with a commercial transaction. The rate calculator enters the default amount of \$100 for a commercial endorsement, the standard charge in NC.

Back Next Cancel

Policy Endorsements Screen

The Policy Endorsements screen allows you to select the type of endorsements to include in the Jacket. The options provided are based on your Old Republic account. To narrow the policy endorsements, the list may be filtered using the filters specified.

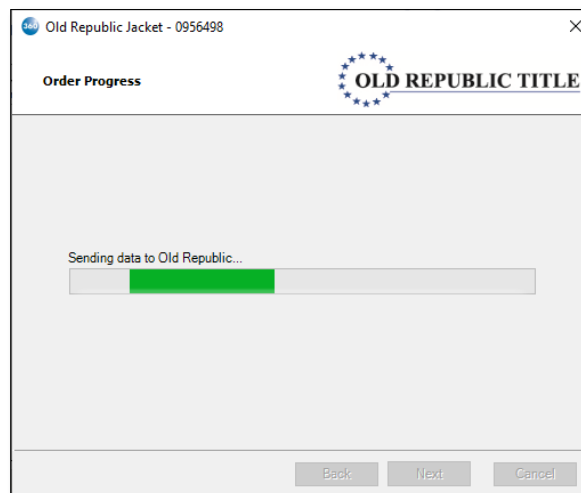
- Click **Submit** to send your product request to Old Republic.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Policy Information** screen.

The Depending on your Old Republic account and property state, you may have the ability to include duplicate endorsements. To add endorsements click the Add button above the endorsements list on the Policy Endorsements screen. The Add Endorsement screen will list the endorsements available to duplicate. Select the desired endorsement and click OK. This endorsement will be added to the Policy Endorsements list. On the Policy Endorsements screen click Submit to advance.

- Click **OK** to continue.
- Click **Cancel** to return to the **Policy Endorsement** screen.

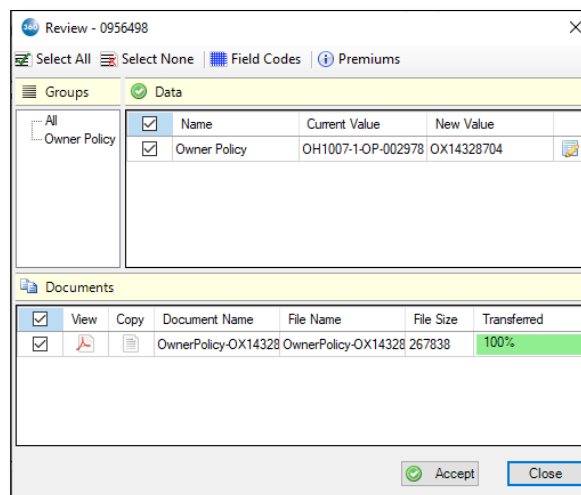
Policy Jacket Sending Page

The Sending Page will display with a status bar when sending the product request to Old Republic.



Reviewing Jacket from Old Republic

Old Republic will immediately return the jacket. The Review screen allows you to view the document(s) and jacket number(s) that are returned. Click Accept to add the document(s) and jacket number(s) to your ProForm order.



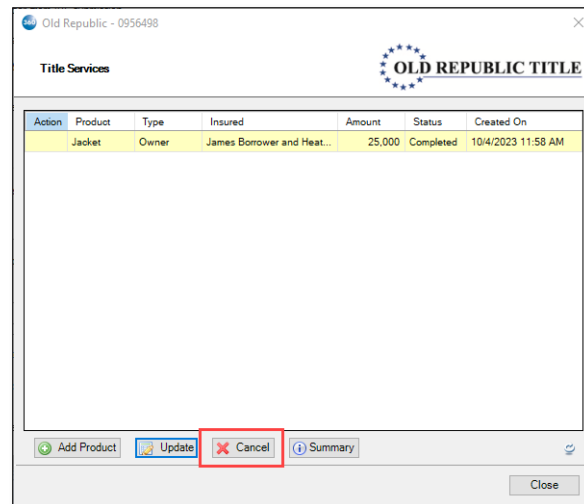
Clicking the Premiums icon on the toolbar of the Review screen will display a screen containing the Premiums associated with the policy created. The Premiums function is also available on the Underwriter Services screen. Highlight the Jacket transaction and click the Summary icon. The Premiums corresponding to the highlighted Jacket transaction will display on the Premiums screen.



Cancelling a Policy Jacket

From the **Summary** screen, you can cancel a Jacket that you previously created from the Order.

- Highlight the Policy Jacket transaction from the list that you want to edit and click the **Cancel** button.
- Upon click of the **Cancel** button, you will be prompted
 - “Are you want to want to cancel this Closing Protection letter?”
 - Please provide a reason for this cancelation.
 - Required
- Once the void has been sent to Old Republic, the Status will change to Canceled.



Updating Jacket

From the **Summary** screen, you can edit a Jacket that you previously created from the Order.

- Highlight the Jacket transaction from the list that you want to edit and click the **Update** button.
 - Upon click of the **Update** button, you will be taken through the Jacket Workflow.
 - The following fields will NOT be available for updating.
 - County
 - Property Type
 - Previously selected Jacket type

