

Security Title User Guide (v1.3)

How to Create or Void a CPL and Jacket | November 27, 2017

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Introduction

The Security Title integration with SoftPro 360 will allow you to seamlessly order Security Title products within ProForm. In this version, SoftPro 360 will be able to create a Security Title file corresponding to your ProForm Order and enable you to order CPLs and Policy Jacket through Security Title as well as void those that you've created through the Order without leaving your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Benefits/Features

Users will be able to perform the following:

Closing Protection Letter (CPL)

- Request a CPL through Security Title directly from your Order.
- View the contents of a CPL.
- Copy the contents of a CPL to your clipboard.
- Accept and attach a CPL to your Order.
- Void a CPL created from your Order.

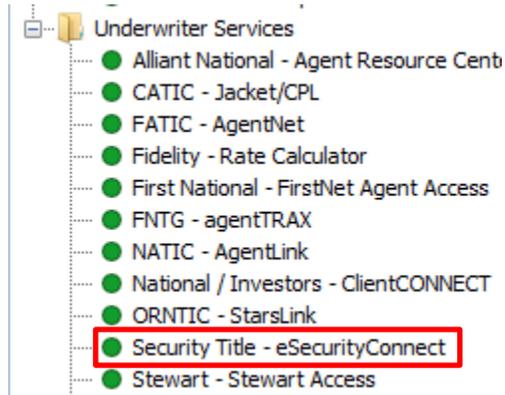
Policy Jackets

- Request a Policy Jacket through Security Title directly from your Order.
- View the contents of a Jacket.
- Accept and attach a Policy Jacket to your Order.
- Void a Policy Jacket created from your Order.
- Edit a Policy Jacket created from your Order.

Launching Security Title

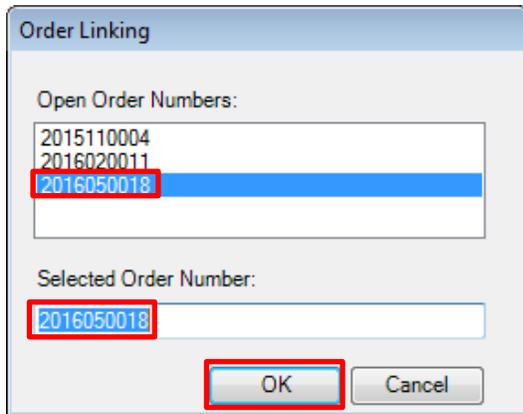
Access from the 360 Services Menu

From the **360 - Services Menu**, double-click **Security Title- eSecurityConnect** located under the **Underwriter Services** folder. This will open the **Order Linking** screen:



Select a ProForm Order for Your Search

From the **Order Linking** screen, you can specify the Order whose contacts you want to search:



Order Linking

Open Order Numbers:

2015110004
2016020011
2016050018

Selected Order Number:

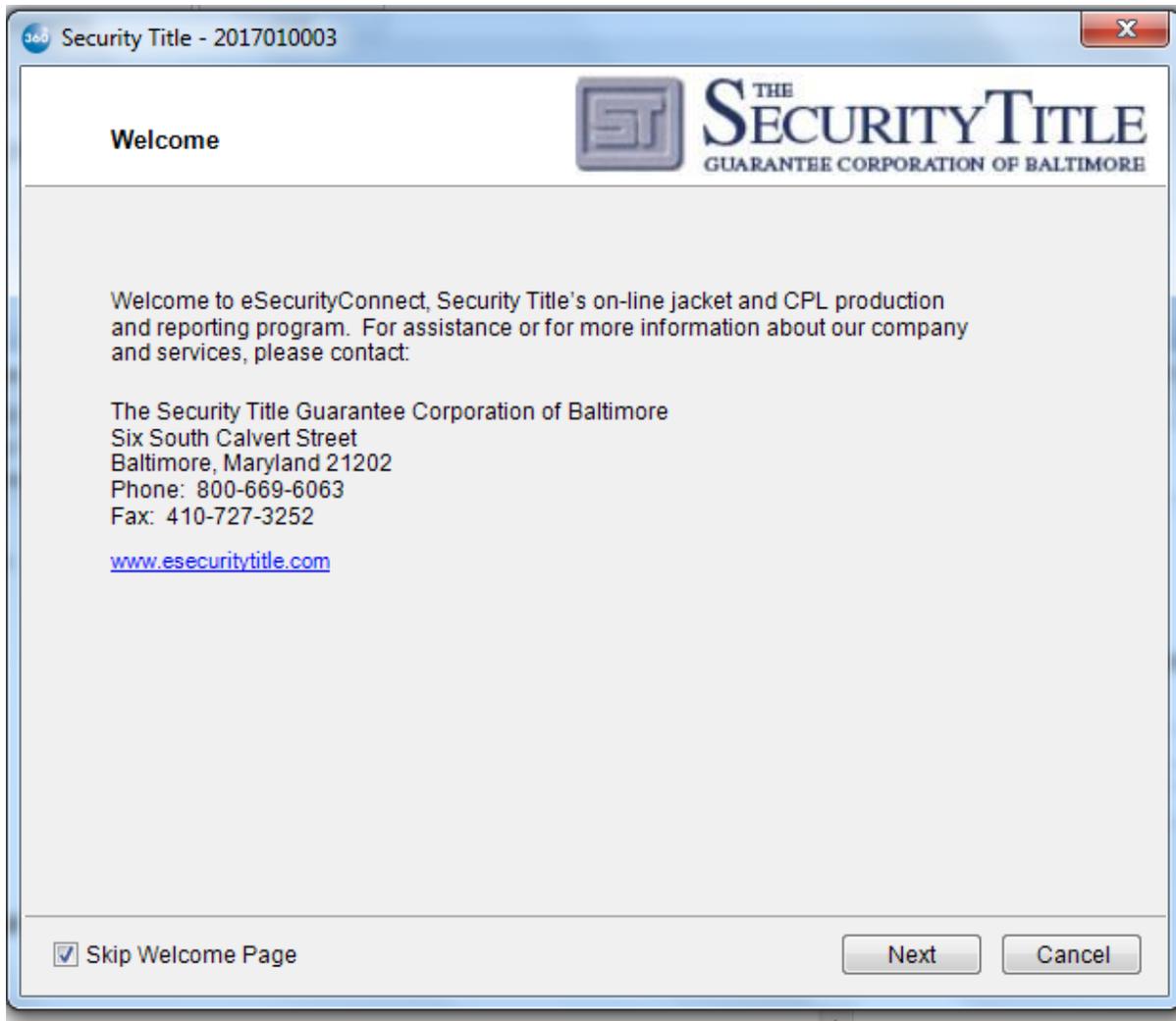
2016050018

OK Cancel

- All the Orders that are currently opened in your 360 session will be listed in the **Open Order Numbers** pane. The **Selected Order Number** field will automatically populate with the currently active ProForm Order.
- You may **select an Order** from the list which will **automatically display** in the **Selected Order Number** field or you can manually enter the desired Order number.
- Click **OK** to navigate to the **Welcome screen**.

Welcome Screen

The **Welcome** screen provides a summary of the product & Security Title's contact information:



- Click **Next** to navigate to the **Agent Selection** screen.

Logging into the Integration

Logging into the Integration requires an Organization ID and a Registered SoftPro 360 user ID. Upon Authentication you will be navigated to Agent Selection screen. You need not enter any credentials manually.

Agent Selection

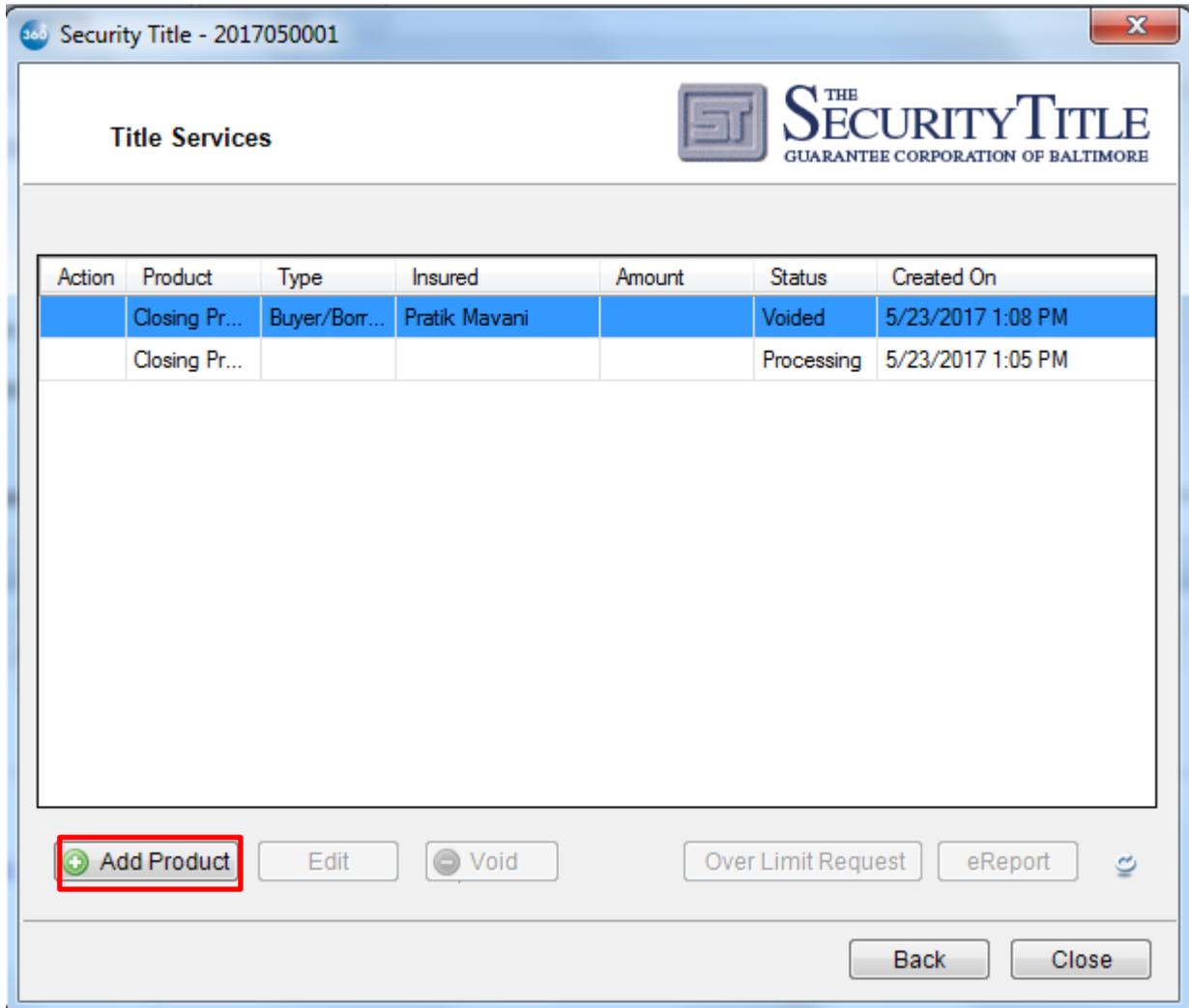
The **Agent Selection** screen lists all the Agents authorized by Security Title and those which have the capability to issue a CPL.

| Agent Name | Agent Number | Agent Address |
|--------------------------------|--------------|-----------------------------------------------|
| Premium Title Agency, L.L.C. | 8989745 | 2345, Naguada Street, NY, Johnson Boul... |
| Garyville Title Agency, L.L.C. | 1245896 | 123 Test Street, NC, Falls of Fayetteville... |

Submitting a CPL Request

Title Services Screen

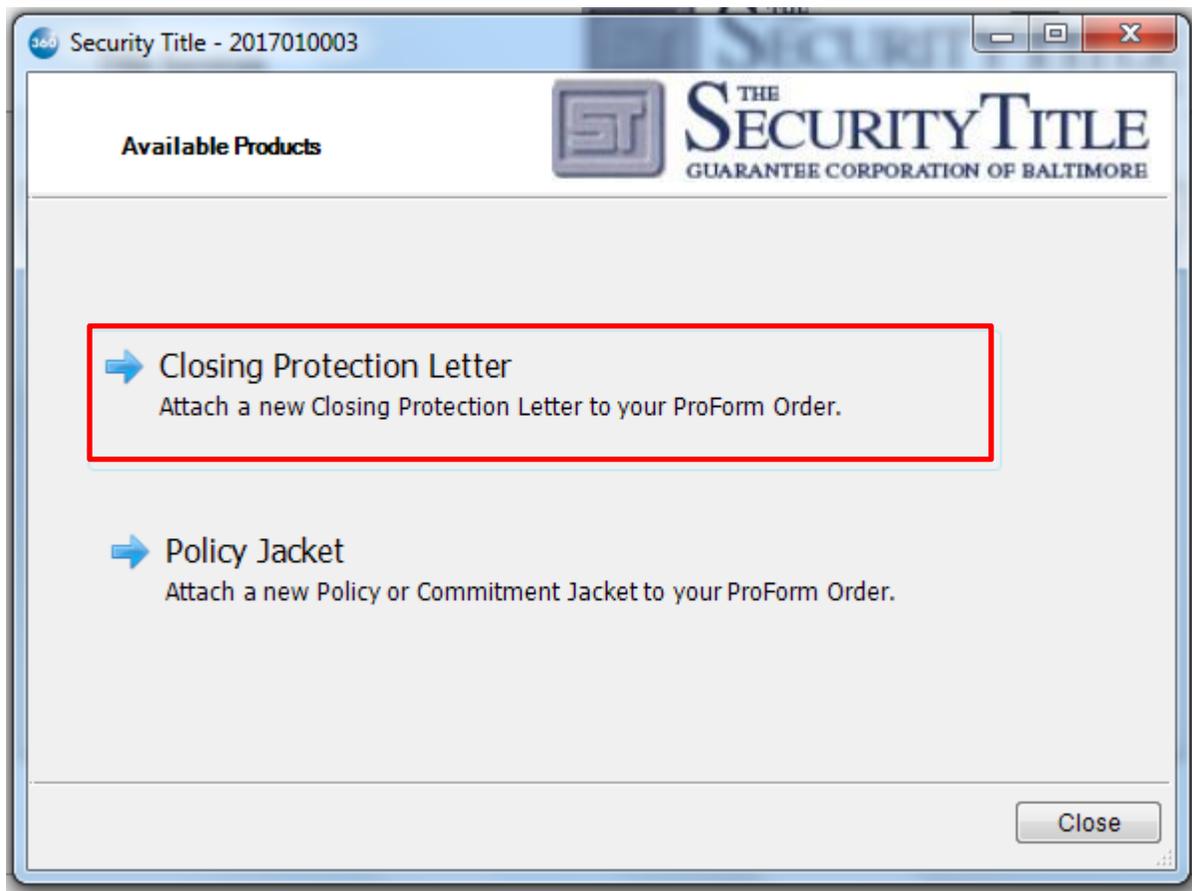
From the **Title Services** screen, you can begin the process of requesting a CPL or Jacket from Security Title:



- The **Title Services** screen displays a table that lists all the CPLs and Policy Jackets that have been generated for an Order along with the following information (column headings) for each CPL or Policy Jackets:
 - **Action:**
 - **Paper Icon** : The CPL/Jackets has not been attached to the Order (**Status = Ready**). Clicking the icon will navigate you to the **Review Letter** screen where you will be able to complete this action.

- **Red Question Mark**: The CPL/Jacket request encountered an error and no CPL/Jacket was created. You can hover over the question mark or double-click it to view a description of the error.
 - **No icon displayed**: CPL/Jackets has been voided (**Status = Voided**) or CPL/Jacket has been attached to the Order (**Status = Completed**).
 - **Product**: The type of product requested from Security Title. The value will be **Closing Protection Letter** or **Policy Jacket**.
 - **Type**: The type of CPL that was generated (**Lender, Buyer, or Seller**) or the type of Policy Jacket generated (**Lender, Owner, Other**)
 - **Insured**: The name of the individual or entity covered by the CPL or Jacket.
 - **Amount**:
 - For a Lender CPL, this value is the loan amount.
 - For a Buyer or Seller CPL, this value is the sales price.
 - For a Jacket, the value will be Coverage Amount.
 - **Status**:
 - **Ready**: The CPL or Jacket was generated but has not been attached to the Order.
 - **Completed**: The CPL or Jacket was generated and attached to the Order.
 - **Rejected**: An error occurred with the CPL or Jacket submission.
 - **Voided**: The CPL or Jacket was canceled/voided.
 - **Created On**: Date and time stamp of when the CPL or Jacket was 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.
 - To **cancel** a CPL, Select the CPL order from Title Services screen and click **Void**. This will void the selected CPL.
 - To **cancel** a Jacket, Select the **Policy Jacket** from Title Services screen and click **Void**. This will navigate to Policy Information screen, click on **Void** button in Policy Information screen to void the Jacket.
 - To **order** a CPL or Jacket, click the **Add Product** button to navigate to the **Available Products screen**.
 - To request for an Over Limit Authorization, click on **Over Limit Request** button and submit.
 - To eReport a file, click on **eReport** button and submit. The eReport button will be active only when we have at least one Policy Jacket created in the queue with **status = In Progress/Ready/Completed**.

Available Products



Adding Property Information

The Property Information screen shows the Property related information. The Property type and county will be matched to the data in the ProForm Order, if there no match, you can select the desired values from the drop down.

Security Title - Closing Protection Letter - 2017050001

Property Information

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

Agent Name: Absolute Title Agency, L.L.C.

Property: 101 Thomson Street, Besides Red Bricks Apartment, NY 10001

Address1: 101 Thomson Street

Address2: Besides Red Bricks Apartment

County: New York

City: New York State: NY Zip: 10000-1000

Selected City: New York

Next Cancel

- The **Agent** Information shows the agent supplied and selected as read only text.
- **County** will be populated based on the value entered in ProForm. If no match is found with the Security Title counties, select the desired county from the drop down.
- **Property** drop down will populate the value based on the data entered in ProForm. If no match is found with the Security Title property types, select the desired value from the drop down.
- The **Property address** will be read only text and shows the street address, State and Zip code.
- The **Address 1** and **Address 2** fields are editable fields.
- **City** will be populated based on the county selection. If no match is found, select the desired city from the drop down.
- **Selected City** will allow you to type a city name. If you select a city from the city dropdown, selected city will show the city as read only. You can also type the city name in this field by selecting the option “**Other**” from city drop down.
- The **Property address, Address 1, City, State, County and Zip** details, if available, will be retained from the previously created product under the same order. You will be able to edit the values retained for the specified fields.

Adding CPL Information

The **CPL Information** screen allows you to enter information needed to request all CPL types:

Security Title - Closing Protection Letter - 2017050001

CPL Information

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

CPL Type: Lender

Office Address: AGNJ1305 - Office - 50 AUS Highway 9N, Suite 205, Morganville, NJ 0

Buyer/Borrower: Pratik Mavani

Approved Attorney: Beress, Viktoria

Closer:

Back Next Cancel

- Select the **CPL Type** from the drop-down options: **Lender**, **Buyer**, or **Seller**.
- The **Office Address** dropdown allows the user to select the office based on the address and office ID.
- The **Buyer/Borrower** field will display the buyer name from your Order. If there are multiple buyers in your Order, then their names will display together in this field. It will also display in the CPL you request. You cannot edit this field.
- Select the **Approved Attorney** from the drop down.
- Select the **Closer** from the Closer list checkboxes. You cannot select more than 2 closers.
- Click **Next** to continue to the following screen:
 - The **Lender Information** screen if the **CPL Type** selected is **Lender**.
 - The **Buyer Information** screen if the **CPL Type** selected is **Buyer**.

- The **Seller Information** screen if the **CPL Type** selected is **Seller**.

Adding Lender Information

The **Lender Selection** screen will appear if your **CPL Type** is **Lender**. Based on the **Lender** entered in the **ProForm Order** the matching lenders will be automatically listed in the Search Results. The default Lender and the **State** entered in the **ProForm Order** will be populated in the **Lender Search** text box and the **State** dropdown respectively. However if you want to search for a specific lender with Security Title, type the desired lender name in **Lender Search** text box and select the **State (optional)** from the dropdown and Click **Search**. Select a **Lender** from the list and click **Next** to continue.

The screenshot shows a software window titled "Security Title - Closing Protection Letter - 2017050001". The main heading is "Lender Selection" next to the logo for "THE SECURITY TITLE GUARANTEE CORPORATION OF BALTIMORE".

Fields and values:

- Loan: 1 (dropdown)
- ProForm Lender: Bank of America
- Lender Search: Bank of America (text box)
- State: NY (dropdown)
- Search button

Search Results List:

| Lender Name |
|----------------------------|
| Bank of America Home Loans |
| Bank of America, N.A. |

Buttons at the bottom: Add Lender, Back, Next, Cancel.

The **Lender Address** screen allows you to select the address available for **selected Lender**. You can select an address from the list and enter other information needed to request a **Lender CPL**.

Lender Address

Loan Number: 1252525

Lender Name: Bank of America Home Loans

| Address1 | Address2 | City | State | Zip |
|-----------------------|-----------|----------------|-------|------------|
| 1295 West Washington | Suite 108 | Tempe | AZ | 85281 |
| 275 Valencia Avenue | | Brea | CA | 92823 |
| 10850 White Rock Road | Suite 101 | Rancho Cordova | CA | 95670 |
| 1800 Tapo Canyon | MSN SV 79 | Simi Valley | CA | 93063-6712 |
| 400 Countrywide Way | MSN-SV22 | Simi Valley | CA | 93065 |

Attention: BOFA

Lender Clause: ISAOA/ATIMA

Clause Details: its successors and/or assigns, as their interests may appear

Buttons: Add Address, Back, Submit, Cancel

- The **Loan Number** field shows the Loan Number in the ProForm Order.
- The **Lender Name** shows the selected lender as read only text.
- The Address selection grid shows the list of available **addresses** for selected lender.
- The **Attention** field allows you to enter the text.
- The **Lender Clause** will list the available Lender Clause options in a drop down.

| Lender Clause | Clause Detail |
|---------------|-------------------------------------------------------------------------------|
| None | This option is selected by default. No lender clause will display in the CPL. |

| | |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------|
| ISAOA/ATIMA | “its successors and/or assigns, as their interests may appear” |
| HUD | “and/or the Secretary of Housing and Urban Development” |
| VA | “and/or the Secretary of Veterans Affairs” |
| FHA | “and/or the Federal Housing Administration” |
| MEAS | “and/or the Mortgage Electronic Affair System Inc” |
| Other | Selecting this option allows you to enter any text in this field that you want to appear as your lender clause in the letter. |

- If you select a **Lender clause** from the Lender Clause drop down, shows the clause details in the Text box and is editable.
- Click **Submit** to request a Lender CPL.

In the **Lender Address** screen, click on **Add Address button** if you want to add a new address and don't want to use the address from the available list of addresses for the selected lender.

Add Lender Address

Loan Number: 3445534

Lender: Bank of America Home Loans

Address: *

City: * State: AL Zip: *

Attention:

Lender Clause: None

Clause Details:

Back Submit Cancel

- The **Loan Number** field shows the Loan Number in the ProForm Order.
- The **Lender Name** shows the selected lender as read only text.
- The **Address** field allows to you enter the address.
- The **City** text box allows you to enter the city.
- The **State** drop down you allows you to select a state.
- The **Zip** text box field allows you to enter the Zip code. e.g. (92234-1445) format.
- The **Attention, Lender Clause, Clause details** will function as described above for Lender Address screen.

Security Title - Closing Protection Letter - 2016090002

Add Lender Address

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

Loan Number: 3445534

Lender: Bank of America Home Loans

Address: 9788 South St
Suite#380

City: Hoboken State: NJ Zip: 45523-3333

Attention: BofA

Lender Clause: ISAOA/ATIMA

Clause Details: its successors and/or assigns, as their interests may appear

Back Submit Cancel

- Click **Submit** to request Lender CPL.

Adding a new Lender

Adding a new Lender which is not available in Security Title database from SoftPro 360 requires an approval from Security Title. The **Add Lender** screen can be accessed by click **Add Lender** button on Lender Selection Screen.

Security Title - Closing Protection Letter - 2016090002

Lender Selection

 **THE SECURITY TITLE**
GUARANTEE CORPORATION OF BALTIMORE

Loan: 1 ProForm Lender: Bank of America

Lender Search: Search

| Lender Name |
|----------------------------------------|
| Bank of America Home Loans |
| Bank of America Home Loans, N.A. |
| Bank of America Mortgage Corporation |
| Bank of America, N.A. |
| Bank of America, N.A. c/o PHH Mortgage |

Add Lender Back Next Cancel

Security Title - Closing Protection Letter - 2017010003

Add Lender

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

Loan: Loan Number:

Lender:

Address1: *

Address2:

City: State: Zip:

Attention:

Lender Clause:

Clause Details:

- If your Order has multiple loans, the **Loan** field will reference each one by number. The first loan listed in the Order will correspond to **1** in the drop down; the second to **2**; the third to **3**, etc.
- The **Loan Number** field will display the Loan Number based on Loan field selection and is editable.
- The **Address 1** and **Address 2** fields are editable to enter the address information.
- The **City** text box allows you to enter the city.
- The **State** drop down you allow you to select a state.
- The **Zip** text box field allows you to enter the Zip code, e.g. (92234-1445) format.
- The **Attention**, **Lender Clause**, **Clause details** will function as described in Lender Address screen.

Security Title - Closing Protection Letter - 2017010003

Add Lender

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

Loan: 1 Loan Number: 67868

Lender: WellsFargo Bank Inc

Address1: 788 South St

Address2: Suite#9800

City: Charolette State: NC Zip: 45454-5445

Attention:

Lender Clause: HUD

Clause Details: and/or the Secretary of Housing and Urban Development

Back **Submit** Cancel

- Click **Submit** to send your Order request to Security Title. If successful, you will navigate to the **Review Letter** screen.

Adding Buyer Information

The **Buyer Information** screen allows you to enter information needed to request a **Buyer CPL**:

Security Title - Closing Protection Letter - 2017010003

Buyer/Borrower Information

Buyer/Borrower: Rob M Smith

Name: Rob M Smith

Address1: 2378 Broadway Avenue

Address2:

City: Sullivan State: CO Zip: 23333-3333

Back Submit Cancel

- If there are multiple **Buyers/Borrowers** in your Order, you will see a read-only list of Buyers/Borrowers in the Buyer/Borrower drop down.
- The **Name** field shows the Buyer/Borrower name selected from the Buyer/Borrower drop down. You can edit the buyer name in this field.
- You can edit the below fields:
 - **Address1**
 - **Address2**
 - **City**
 - **State**
 - **Zip**
- Click **Submit** to send your Order request to Security Title. If successful, you will navigate to the **Review Letter** screen

Adding Seller Information

The **Seller Information** screen allows you to enter information needed to request a **Seller CPL**:

Security Title - Closing Protection Letter - 2017010003

Seller Information

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

Seller: Sam L Witwicky

Name: Sam L Witwicky

Address1: 2378 Broadway Avenue

Address2:

City: Sullivan State: CO Zip: 23333-3333

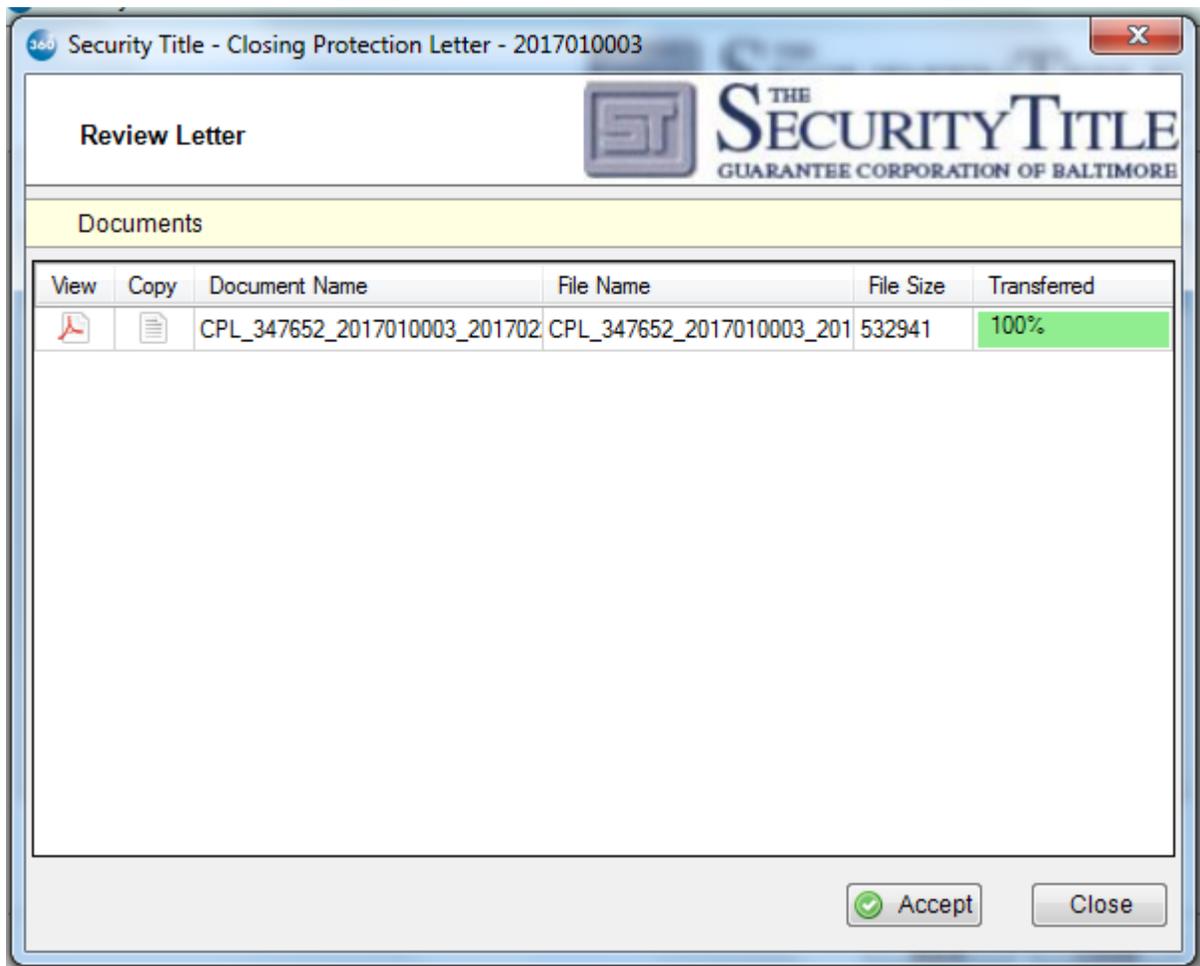
Back Submit Cancel

- If there are multiple **Sellers** in your Order, you will see a read-only list of Sellers in the Seller drop down.
- The **Name** field shows the Seller name selected from the Seller drop down. You can edit the Seller name in this field.
- You can edit the below fields:
 - **Address1**
 - **Address2**
 - **City**
 - **State**
 - **Zip**

- Click **Submit** to send your Order request to Security Title. If successful, you will navigate to the **Review Letter** screen.

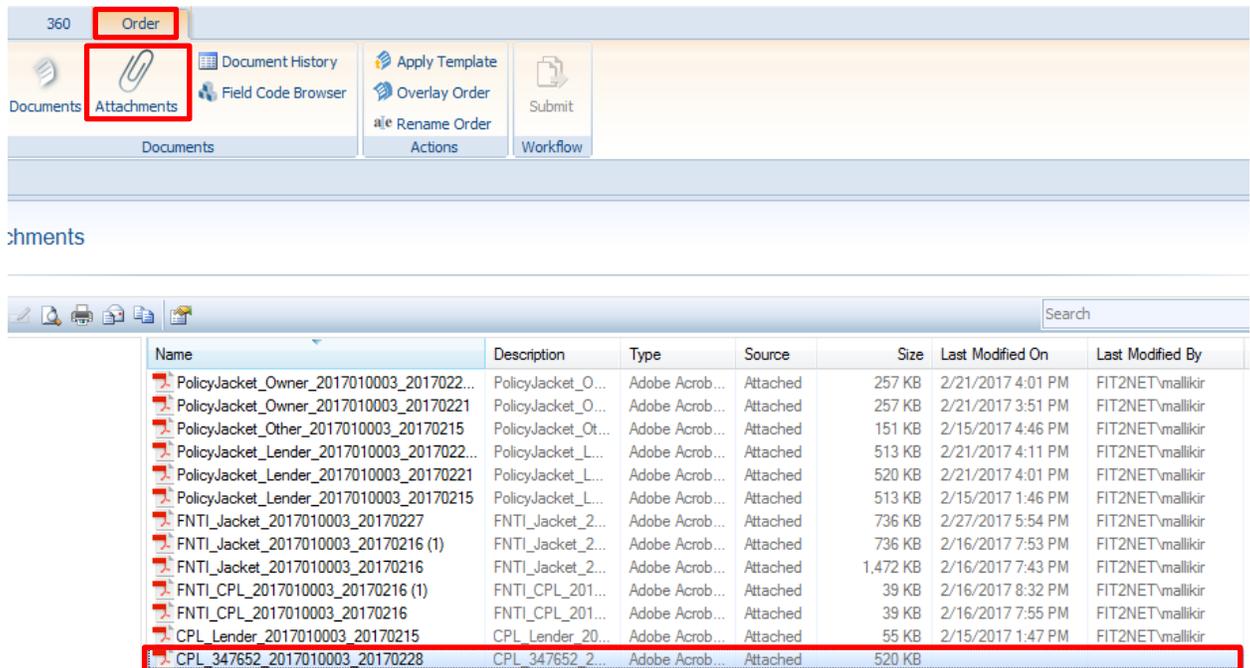
Reviewing the Requested CPL

After the data you've entered is sent to Security Title and if the submission is successful, the **Review Letter** screen will allow you to access the CPL that was created:



- 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:
 - CPL_{CPL ID}_{Order Name}_{YYYYMMDD}
 - Example: **CPL_347652_2017010003_20170228**
- The **Review Letter** screen also displays the **File Size** and the percent of the file that was **transferred** from Security Title.

- 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**.
- You will also be able to view the attached CPLs in your ProForm Order under the **Attachments** section of your **Order**:



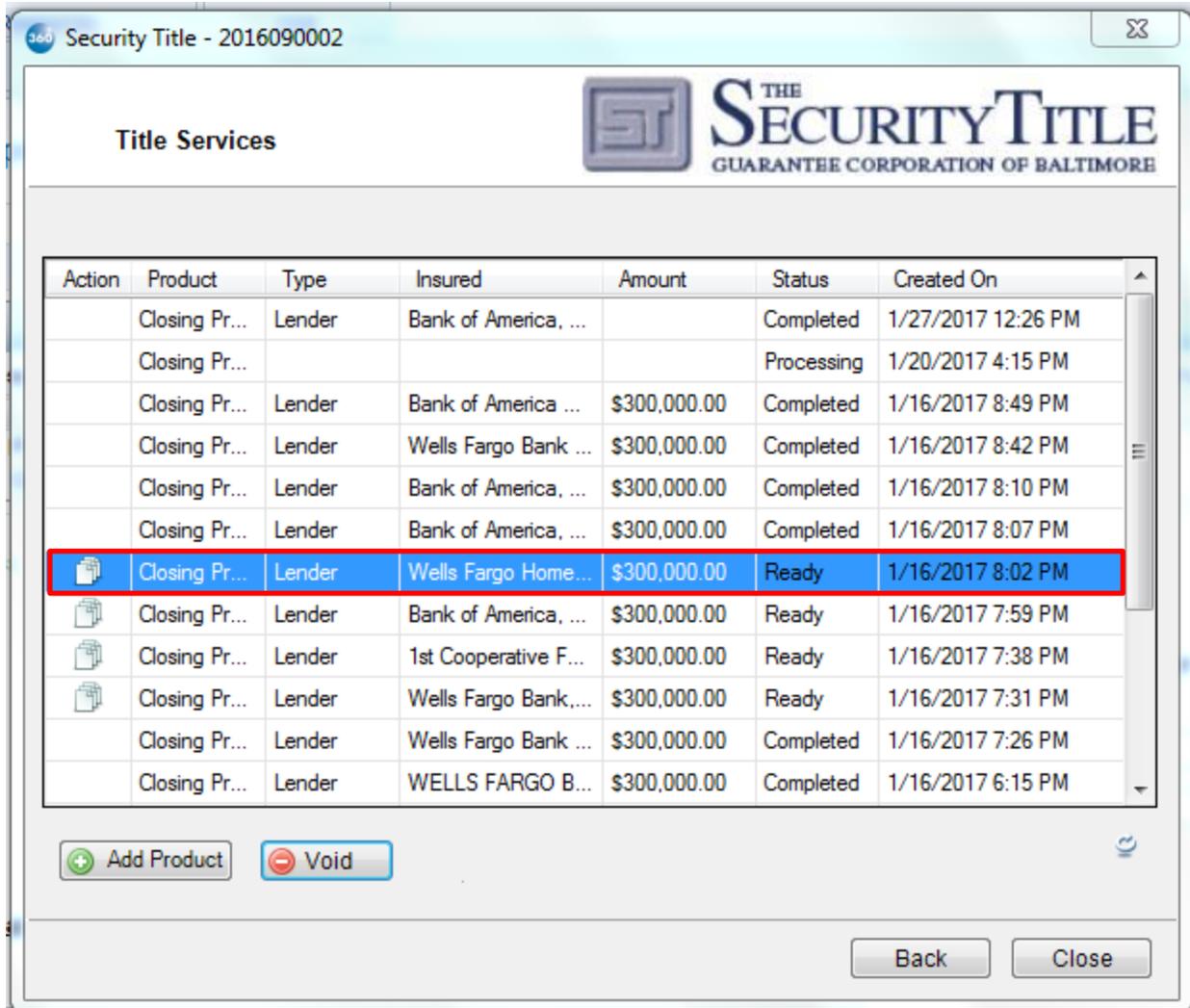
The screenshot shows the SOFTPRO 360 interface. At the top, the 'Order' tab is selected. Below the navigation bar, there are several icons: 'Documents', 'Attachments' (highlighted with a red box), 'Document History', 'Field Code Browser', 'Apply Template', 'Overlay Order', 'Rename Order', and 'Submit'. Below these icons, there are three tabs: 'Documents', 'Actions', and 'Workflow'. The main content area is titled 'Attachments' and contains a table of files. The table has the following columns: Name, Description, Type, Source, Size, Last Modified On, and Last Modified By. The file 'CPL_347652_2017010003_20170228' is highlighted with a red box.

| Name | Description | Type | Source | Size | Last Modified On | Last Modified By |
|-------------------------------------------|--------------------|----------------|----------|----------|-------------------|------------------|
| PolicyJacket_Owner_2017010003_2017022... | PolicyJacket_O... | Adobe Acrob... | Attached | 257 KB | 2/21/2017 4:01 PM | FIT2NET\mallikir |
| PolicyJacket_Owner_2017010003_20170221 | PolicyJacket_O... | Adobe Acrob... | Attached | 257 KB | 2/21/2017 3:51 PM | FIT2NET\mallikir |
| PolicyJacket_Other_2017010003_20170215 | PolicyJacket_Ot... | Adobe Acrob... | Attached | 151 KB | 2/15/2017 4:46 PM | FIT2NET\mallikir |
| PolicyJacket_Lender_2017010003_2017022... | PolicyJacket_L... | Adobe Acrob... | Attached | 513 KB | 2/21/2017 4:11 PM | FIT2NET\mallikir |
| PolicyJacket_Lender_2017010003_20170221 | PolicyJacket_L... | Adobe Acrob... | Attached | 520 KB | 2/21/2017 4:01 PM | FIT2NET\mallikir |
| PolicyJacket_Lender_2017010003_20170215 | PolicyJacket_L... | Adobe Acrob... | Attached | 513 KB | 2/15/2017 1:46 PM | FIT2NET\mallikir |
| FNTI_Jacket_2017010003_20170227 | FNTI_Jacket_2... | Adobe Acrob... | Attached | 736 KB | 2/27/2017 5:54 PM | FIT2NET\mallikir |
| FNTI_Jacket_2017010003_20170216 (1) | FNTI_Jacket_2... | Adobe Acrob... | Attached | 736 KB | 2/16/2017 7:53 PM | FIT2NET\mallikir |
| FNTI_Jacket_2017010003_20170216 | FNTI_Jacket_2... | Adobe Acrob... | Attached | 1,472 KB | 2/16/2017 7:43 PM | FIT2NET\mallikir |
| FNTI_CPL_2017010003_20170216 (1) | FNTI_CPL_201... | Adobe Acrob... | Attached | 39 KB | 2/16/2017 8:32 PM | FIT2NET\mallikir |
| FNTI_CPL_2017010003_20170216 | FNTI_CPL_201... | Adobe Acrob... | Attached | 39 KB | 2/16/2017 7:55 PM | FIT2NET\mallikir |
| CPL_Lender_2017010003_20170215 | CPL_Lender_20... | Adobe Acrob... | Attached | 55 KB | 2/15/2017 1:47 PM | FIT2NET\mallikir |
| CPL_347652_2017010003_20170228 | CPL_347652_2... | Adobe Acrob... | Attached | 520 KB | | |

Voiding a CPL

From the **Title Services** screen, you can void a CPL that you previously created from the Order.

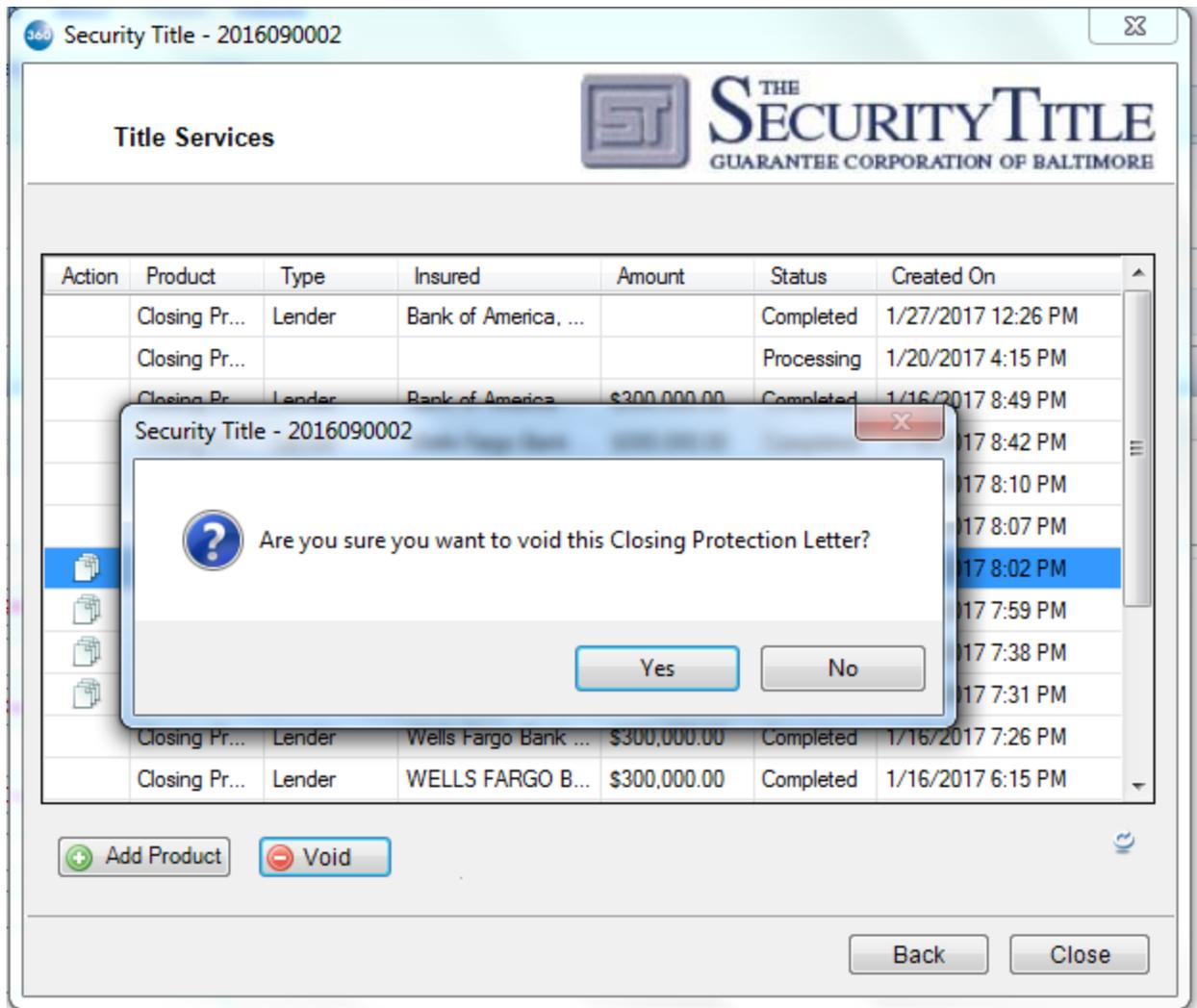
- Highlight the CPL from the list that you want to cancel and click the **Void CPL** button:



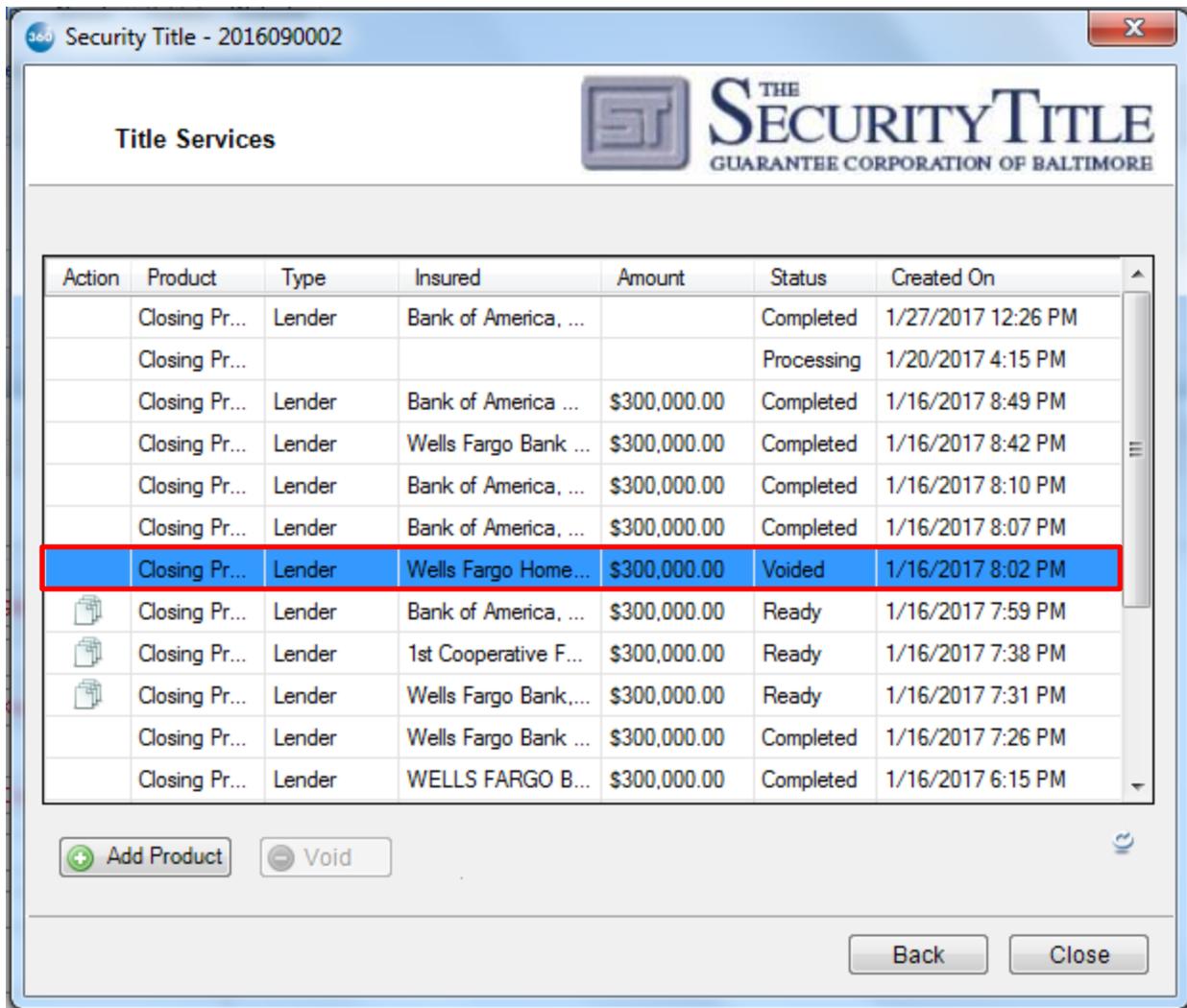
The screenshot shows a software window titled "Security Title - 2016090002". The window contains the "Title Services" header with the logo for "THE SECURITY TITLE GUARANTEE CORPORATION OF BALTIMORE". Below the header is a table with the following columns: Action, Product, Type, Insured, Amount, Status, and Created On. The table lists several closing protection letters, with one row highlighted in blue and a red border. Below the table are buttons for "Add Product" and "Void", and at the bottom right, buttons for "Back" and "Close".

| Action | Product | Type | Insured | Amount | Status | Created On |
|--------|---------------|--------|----------------------|--------------|------------|--------------------|
| | Closing Pr... | Lender | Bank of America, ... | | Completed | 1/27/2017 12:26 PM |
| | Closing Pr... | | | | Processing | 1/20/2017 4:15 PM |
| | Closing Pr... | Lender | Bank of America ... | \$300,000.00 | Completed | 1/16/2017 8:49 PM |
| | Closing Pr... | Lender | Wells Fargo Bank ... | \$300,000.00 | Completed | 1/16/2017 8:42 PM |
| | Closing Pr... | Lender | Bank of America, ... | \$300,000.00 | Completed | 1/16/2017 8:10 PM |
| | Closing Pr... | Lender | Bank of America, ... | \$300,000.00 | Completed | 1/16/2017 8:07 PM |
| | Closing Pr... | Lender | Wells Fargo Home... | \$300,000.00 | Ready | 1/16/2017 8:02 PM |
| | Closing Pr... | Lender | Bank of America, ... | \$300,000.00 | Ready | 1/16/2017 7:59 PM |
| | Closing Pr... | Lender | 1st Cooperative F... | \$300,000.00 | Ready | 1/16/2017 7:38 PM |
| | Closing Pr... | Lender | Wells Fargo Bank,... | \$300,000.00 | Ready | 1/16/2017 7:31 PM |
| | Closing Pr... | Lender | Wells Fargo Bank ... | \$300,000.00 | Completed | 1/16/2017 7:26 PM |
| | Closing Pr... | Lender | WELLS FARGO B... | \$300,000.00 | Completed | 1/16/2017 6:15 PM |

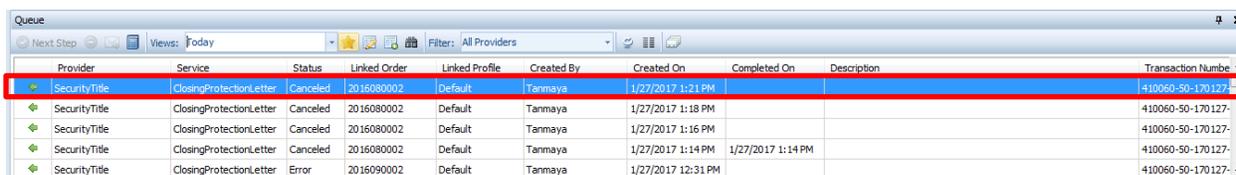
- A message asking if you're sure you want to void the CPL will display. Click **Yes** to continue or **No** to return to the **Title Services** screen:



- Click **Yes** to Void CPL, you will return to the Title Services screen, where the CPL transaction will be greyed out and the **Status** will change to **Voided**. You will no longer be able to access this CPL.



- The queue in your ProForm Order will show the CPL as **Canceled**:



Submitting a Jacket Request

To order a Jacket, click the **Add Product** icon at the bottom of the Title Services Screen, this will launch the **Available Products**. You can click on Policy Jacket icon to start ordering the Jacket.



Transaction Information

The Transaction Information Screen appears on selecting policy jacket creation under Add Product.

The screenshot shows a web application window titled "Security Title - Policy Jacket - 2017050001". The main heading is "Transaction Information" next to the Security Title logo. The form contains the following fields:

- Agent Name: Absolute Title Agency, L.L.C.
- Transaction Type: Purchase (dropdown)
- Property Type: Residential, owner-occupied (dropdown)
- Closing Date: 05/23/2017 (calendar icon)
- Property: 101 Thomson Street, Besides Red Bricks Apartment, NY 100 (dropdown)
- Address 1: 101 Thomson Street
- Address 2: Besides Red Bricks Apartment
- County: New York (dropdown)
- City: New York (dropdown)
- State: NY
- Zip: 10000-1000
- Selected City: New York

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

The **Transaction Information** screen displays the information below.

- The selected **Agent Name** at the top of the screen, which is a read-only field.
- The **Transaction Type** dropdown will by default select the transaction type selected in ProForm Order. This field is required and editable.
- The **Property Type** is a required drop down field; you can select the required property type.
- The **Closing Date** is a required and editable date field which will display the settlement date entered in ProForm order. The selected Closing Date will be retained for next iteration of jacket creation.
- The **Property** field is a drop down; you can select the required property address from the available drop down list.
- **County** will be populated based on the value entered in ProForm. If no match is found with the Security Title counties, select the desired county from the drop down.
- The **Address 1** and **Address 2** fields are editable fields.

- **City** will be populated based on the county selection. If no match is found, select the desired city from the drop down.
- **Selected City** will allow you to type a city name. If you select a city from the city dropdown, selected city will show the city as read only. You can also type the city name in this field by selecting the option “**Other**” from city drop down.
- The **Closing Date, Transaction Type, Property Type, Property, Address 1, City, State, County and Zip** details, if available, will be retained from the previously created product under the same order. You will be able to edit the values retained for the specified fields.
- Click **Next** to proceed to **Jacket Selection Screen**.

Jacket Selection

The **Jacket Selection** screen provides the option of selecting Simultaneous, Lender, Owner, Lender Commitment or Owner Commitment as type of Jacket to be issued. If the ProForm order has multiple loans for the Lender, the loan drop down will be enabled allowing a selection of the First, Second or Third loan.

Security Title - Policy Jacket - 2017050001

Jacket Selection

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

Select the Jacket to be Issued:

Simultaneous

Lender

First Loan

Owner

Owner Commitment

Lender Commitment

Other

Proposed Total Loan Policy Amount: \$250,000.00

Proposed Total Owners Policy Amount: \$15.00

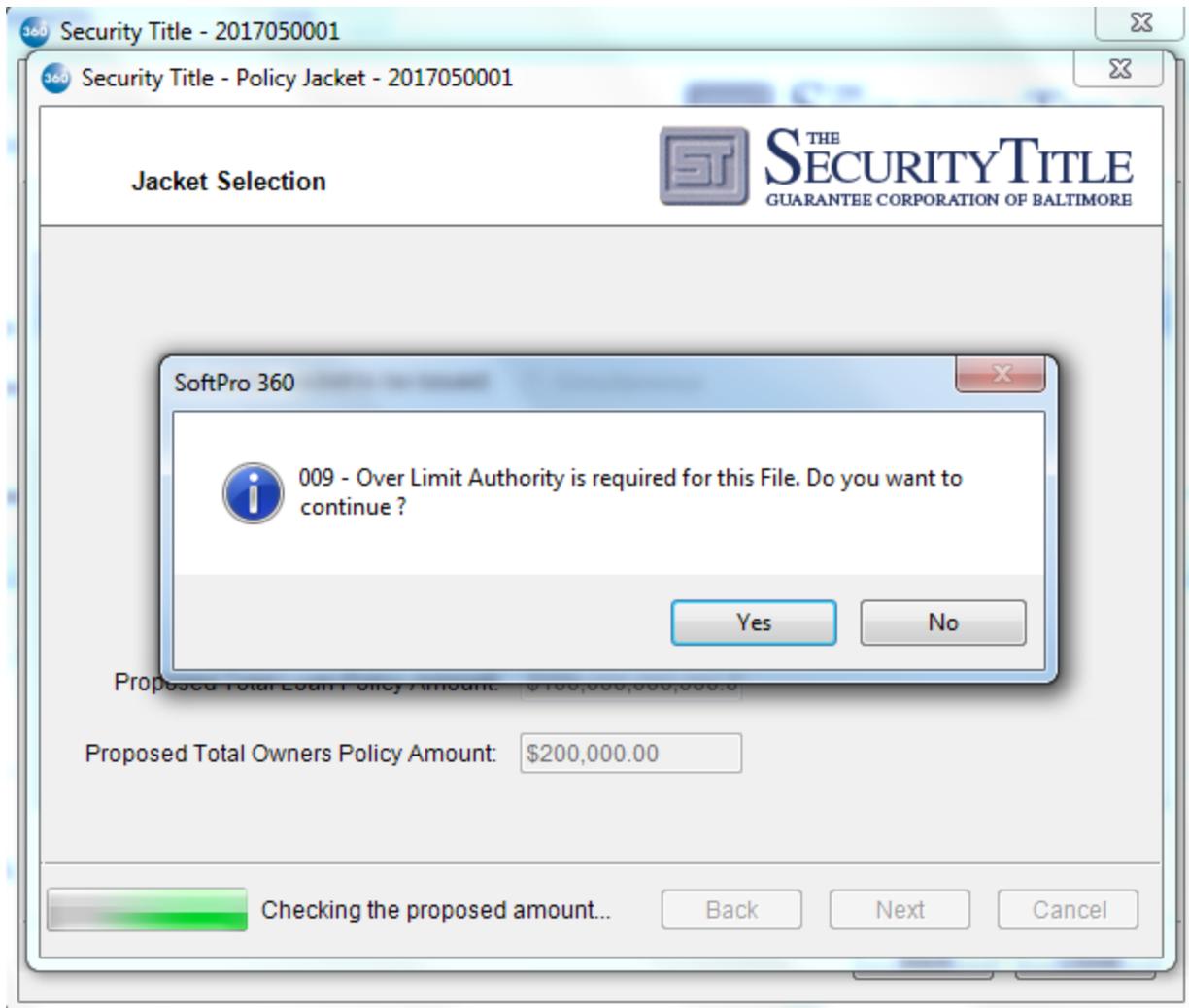
Back Next Cancel

The **Jacket Selection** displays the information below.

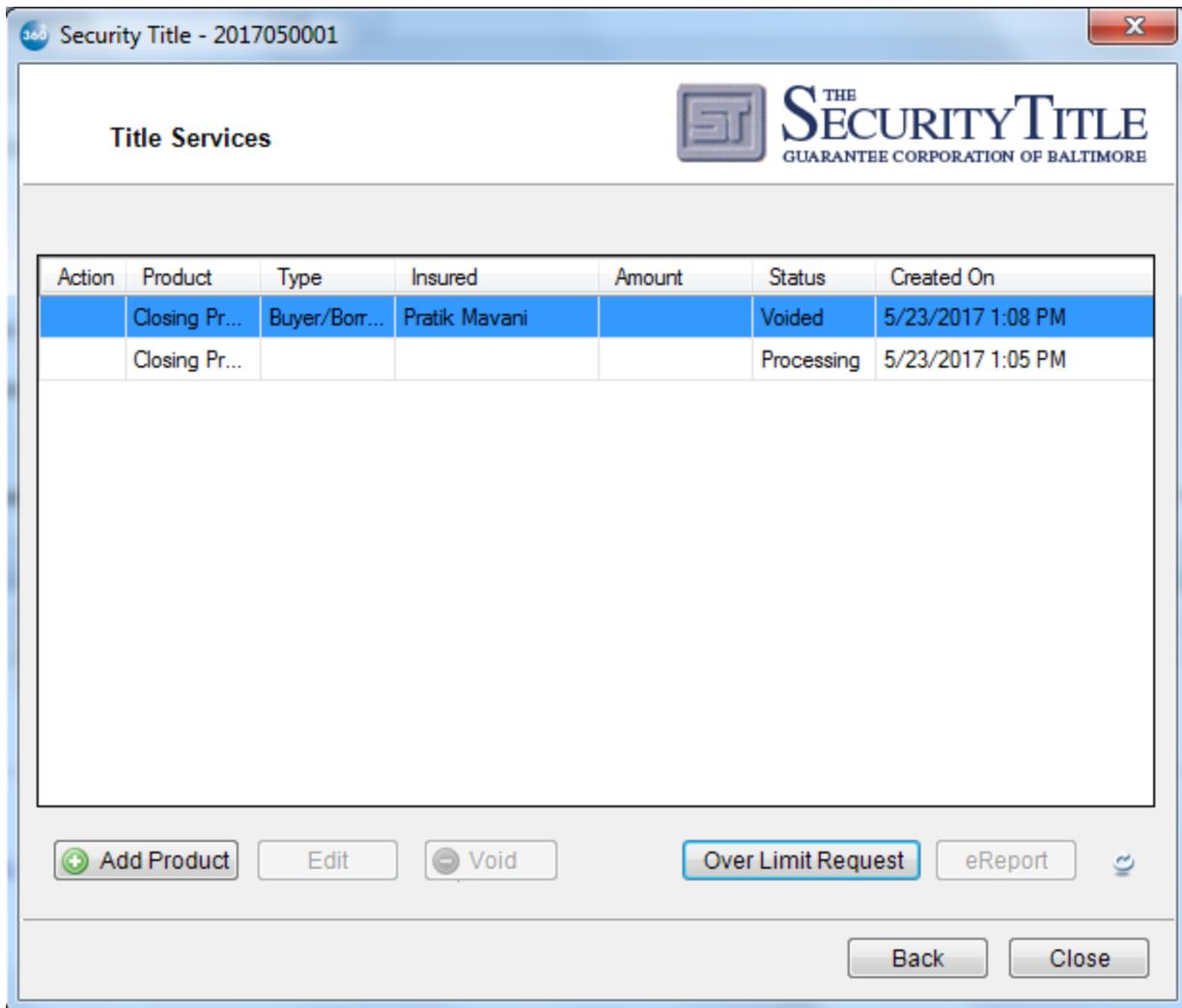
- **Proposed Total Loan Policy Amount:** This value is pulled from ProForm for a Loan Policy. On selecting the Jacket Type as “**Lender**” and clicking next, this value will be checked for Over Limit Authentication (OLA). If this value exceeds the allowed authorization limit, you will be redirected to the Title Services Screen. On the Title services screen, click the button “**Over Limit Request**” to submit the OLA request.
- **Proposed Total Owners Policy Amount:** This value is pulled from ProForm for an Owner’s Policy. On selecting the Jacket Type as “**Owner**” and clicking next, this value will be checked for Over Limit Authentication (OLA). If this value above the allowed authorization limit, you will be redirected to the Title Services Screen. On the Title services screen, click the button “**Over Limit Request**” to submit the OLA request.
- If jacket type selected = Lender, then **Proposed Total Owners Policy Amount** will be greyed out (disabled).
- If jacket type selected = Owner, then **Proposed Total Loan Policy Amount** will be greyed out (disabled).
- If jacket type selected = Simultaneous, then **Proposed Total Loan Policy Amount and Proposed Total Owners Policy Amount** will be enabled.
- If jacket type selected = Lender Commitment, then **Proposed Total Loan Policy Amount will be mandatory and Proposed Total Owners Policy Amount** will be enabled and non-mandatory. The value of **Proposed Total Loan Policy Amount** will be pre-filled in the commitment coverage amount field in the next screen.
- If jacket type selected = Owner Commitment, then **Proposed Total Owners Policy Amount will be mandatory and Proposed Total Loan Policy Amount** will be enabled and non-mandatory. The value of **Proposed Total Owners Policy Amount** will be pre-filled in the commitment coverage amount field in the next screen.

Over Limit Authorization

- If the value provided in **Proposed Total Loan Policy Amount or Proposed Total Owners Policy Amount** is higher than the agent’s authorization limit, then you’ll see the error below.



- Click **Yes**, to stay on Jacket Selection Screen and reduce the proposed amounts in order to proceed. Click **No**, to be redirected to **Title Services** Screen and to access the **Over Limit Request** button.



- When you click the Over Limit Request button, you will be redirected to a website where you can submit the request.
- <https://www.caitools.com/ePhoenix/AgentServices/FileNumberRequestApproval.cfm?FileNumberID=XXXXX>
- Once you have requested an Over Limit Authorization, no other Policy Jacket can be further created until authorization has been received. The error below will be shown if an authorization is pending and you try to create a new Policy Jacket.

The screenshot shows a web application window titled "Security Title - 2017050002". The main header includes the "Title Services" text and the logo for "THE SECURITY TITLE GUARANTEE CORPORATION OF BALTIMORE". Below the header is a table with the following data:

| Action | Product | Type | Insured | Amount | Status | Created On |
|--------|---------------|------------|---------|---------|--------|-------------------|
| | Policy Jac... | Commitment | | \$10.00 | Ready | 5/15/2017 2:23 PM |

An error dialog box titled "SoftPro 360" is overlaid on the table. It contains an information icon and the text: "008 - The Total of the Liability Amounts in your generated Jackets has exceeded the Agent's Authority". An "OK" button is located at the bottom right of the dialog box.

At the bottom of the main window, there are several buttons: "Add Product", "Edit", "Void", "Over Limit Request", "eReport", "Back", and "Close".

Lender Jacket Information

The **Lender Jacket Information** screen is displayed when you select Lender Policy Type from the Jacket Selection screen.

Security Title - Policy Jacket - 201705000321

Lender Jacket Information

Loan No: L123

Closing Date: 05/08/2017

Recorded Date: []

Use Recorded Date as Policy Date

Coverage Amount: \$10.00

Mortgage Date: []

Form: ALTA Short Form Res Loan Policy-Current Violations

Buyer/Borrower: John Moore, Buyer Organization, Buyer Husband and Buyer Spouse, B

Insured: Bank of America

Signatory: []

RateType: Sale Rate

Prior Policy Date: []

Prior Policy Amount: \$20.00

Back Next Cancel

The Lender Jacket Information screen will display the below information.

- The **Closing Date** is an editable field and is defaulted from the date entered in ProForm.
- The **Recorded Date** is an editable field and is defaulted from the date entered in ProForm. This will be required field if the **Recorded Date is Policy Date** checkbox is enabled and checked.
- The **Use Recorded Date as Policy Date** checkbox will be enabled if the Form type selected is **Short Form Residential Loan**.
- The **Mortgage Date** is an editable field and is defaulted from the date entered in ProForm.
- The **Coverage Amount** is editable field and allows you to enter the Coverage Amount. The default value will be the value entered in ProForm.
- The ProForm **Loan No** will be a non-editable field at the top of the screen.
- The **Form** allows you to select the Other Policy Type from the dropdown.
- The **Buyer/Borrower** field is pulled from the ProForm order.

- The **Insured** is an editable field and allows you to enter the name of the Insured.
- The **Signatory** is a drop down field and is read only. You can select the required Signatory from the available drop down list.
- The **Rate Type** is a drop down field and is read only. You can select the required Rate Type from the available drop down list.
- **Prior Policy Date** field is an editable field and **Prior Policy Amount** is a non-editable field pulled from ProForm.

Loan Endorsements

The **Loan Endorsements** screen displays the endorsements selected in ProForm and also endorsements returned by STG that can be added if required. Hide/Unhide the endorsements selected in ProForm by clicking the checkbox Show/Hide ProForm Endorsements. Click **Submit** to request for an Lender Policy Jacket.

Security Title - Policy Jacket - 2017090003

Loan Endorsement

ALTA Short Form Res Loan Policy-Current Violations Display All

| Name |
|-------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> ALTA 4.1.06 Condominium |
| <input type="checkbox"/> ALTA 5.1.06 Planned Unit Development |
| <input type="checkbox"/> ALTA 6.06 Variable Rate Mortgage |
| <input type="checkbox"/> ALTA 6.2.06 Variable Rate Mortgage - Negative Amortization |

Show/Hide Proform Endorsements

Endorsements in ProForm Order

Back **Submit** Cancel

Owner Jacket Information

The **Owner Jacket Information** screen is displayed when you select Owner Policy Type from the Jacket Selection screen.

Owner Jacket Information

Closing Date: 05/22/2017

Coverage Amount: \$200,000.00

Form: Owner's Policy of Title Insurance (06-17-06)

Buyer/Borrower: Pratik Mavani

Signatory: Yelena Mitelberg

Rate Type: Basic

Prior Policy Date:

Prior Policy Amount: \$0.00

Back Next Cancel

The Lender Jacket Information screen will display the below information.

- The **Closing Date** is an editable field and is defaulted from the date entered in ProForm.
- The **Coverage Amount** is an editable field and allows you to enter the Coverage Amount. The default value will be the value entered in ProForm.
- The **Form** allows you to select the Other Policy Type from the dropdown.
- The **Buyer/Borrower** field is pulled from the ProForm order.
- The **Signatory** is a drop down field and is read only. You can select the required Signatory from the available drop down list.
- The **Rate Type** is a drop down field and is read only. You can select the required Rate Type from the available drop down list.
- **Prior Policy Date** field is an editable field and **Prior Policy Amount** is a non-editable field pulled from ProForm.

Owners Endorsements

The **Owners Endorsements** screen displays the endorsements selected in ProForm and also endorsements returned by STG that can be added if required. Hide/Unhide the endorsements selected in ProForm by clicking the checkbox Show/Hide ProForm Endorsements. Click **Submit** to request for an Owner Policy Jacket.

Security Title - Policy Jacket - 2017100012

Owners Endorsement

Display All

| Name |
|---------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> ALTA 3.1.06 Zoning / Improved Property |
| <input type="checkbox"/> ALTA 4.1.06 Condominium |
| <input type="checkbox"/> ALTA 5.1.06 Planned Unit Development |
| <input type="checkbox"/> ALTA 7.2.06 Manufactured Housing conversions, Owner's Policy |

Show/Hide Proform Endorsements

Endorsements in ProForm Order

Back Submit Cancel

Commitment Jacket Information

The **Commitment Jacket Information** screen is displayed when you select Owner or Lender Commitment Policy Type from the Jacket Selection screen. Click **Submit** to request for a Commitment Policy Jacket.

Security Title - Policy Jacket - 2017090003

Commitment Jacket Information

Commitment Date: 11/06/2017 Coverage Amount: \$50,000.00

Form: Commitment (06-17-06)

Endorsements:

| Name |
|---------------------------------------------------------------|
| <input checked="" type="checkbox"/> ALTA 4.1.06 Condominium |
| <input type="checkbox"/> ALTA 5.1.06 Planned Unit Development |

Buyer/Borrower: Steve Waugh and Stephe Waugh

Owner Insured: Steve Waugh and Stephe Waugh

Loan Insured: Bank of America

Signatory: Patricia A. Baun

Back **Submit** Cancel

The Lender Jacket Information screen will display the below information.

- The **Commitment Date** is an editable date field. The field will be required and empty during first commitment creation. The value provided in the commitment date field will be retained during next commitment creation.
- The **Coverage Amount** field will be pre-filled with either the proposed loan amount or the proposed owner's amount values from the jacket selection screen, based on the commitment type selected. The field will be required and editable.
- The **Endorsements** display available endorsements returned by STG.
- The **Form** allows you to select the Other Policy Type from the dropdown.
- The **Buyer/Borrower** field is non-editable and is pulled from the ProForm order. The field will be a required field in case of an Owner Commitment.
- The **Owner Insured** is an editable field and allows you to enter the name of the Insured. The field will be a required field in case of an **Owner Commitment** and it will display the Buyer names from the ProForm order by default.

- The **Loan Insured** is an editable field and allows you to enter the name of the Insured. The field will be a required field in case of a **Lender Commitment** and the Lender name from the ProForm order will be displayed by default.
- The **Signatory** is a drop down field and is read only. You can select the required Signatory from the available drop down list.

Reviewing the Requested Policy Jacket

After the data you've entered is sent to Security Title and if the submission is successful, the **Review Jacket** screen will allow you to access the Policy Jacket that was created:

The screenshot shows the 'Review Jacket' interface for Security Title - Policy Jacket - 201705000321. The interface includes a header with the company logo and name, and a table with the following data:

| Name | Current Value | New Value |
|--------------|---------------|-------------|
| Loan Policy | 54321 | BSF06091636 |
| Owner Policy | 12345 | B06205573 |

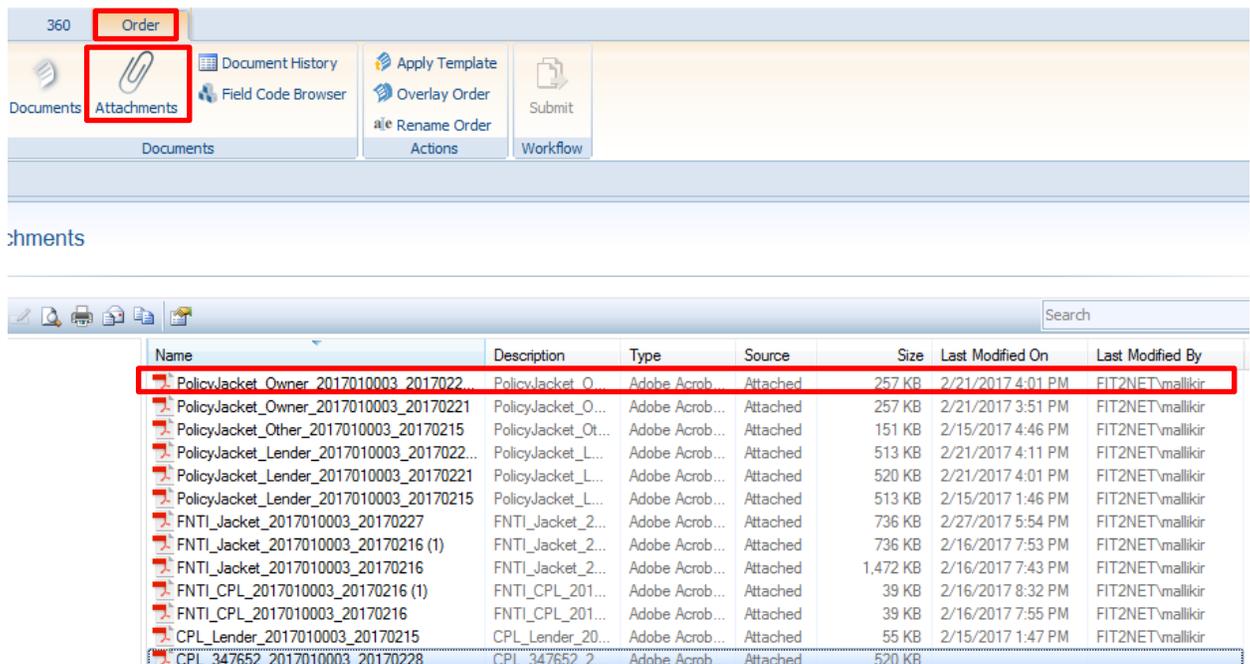
Below the table is a 'Documents' section with the following data:

| View | Copy | File Name | File Size | Transferred |
|------|------|-----------------------------------------------|-----------|-------------|
| | | PolicyJacket_Lender_201705000321_20170523.pdf | 306.28 KB | 100% |
| | | PolicyJacket_Owner_201705000321_20170523.pdf | 330.81 KB | 100% |

At the bottom of the screen, there are two buttons: 'Accept' and 'Close'.

- To view the 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 Jacket will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
 - PolicyJacket_PolicyType_{Order Name}_{YYYYMMDD}
 Example: **PolicyJacket_Lender_201705000321_20170523**
- The **Review Jacket** screen also displays the **File Size** and the percent of the file that was **transferred** from Security Title.
- Click **Accept** to attach the Jacket to your Order. You will automatically return to the **Title Services** screen and the Jacket will have a status of **Completed**.
- If you **close** without attaching your Order, you will return to the **Title Services** screen and the Jacket will have a status of **Ready**.
- You will also be able to view the attached Jackets in your ProForm Order under the **Attachments** section of your **Order**:



The screenshot shows the SOFTPRO 360 interface. At the top, the 'Order' tab is selected. Below it, there are several icons and buttons: 'Documents', 'Attachments' (highlighted with a red box), 'Document History', 'Field Code Browser', 'Apply Template', 'Overlay Order', 'Rename Order', and 'Submit'. Below these are three tabs: 'Documents', 'Actions', and 'Workflow'.

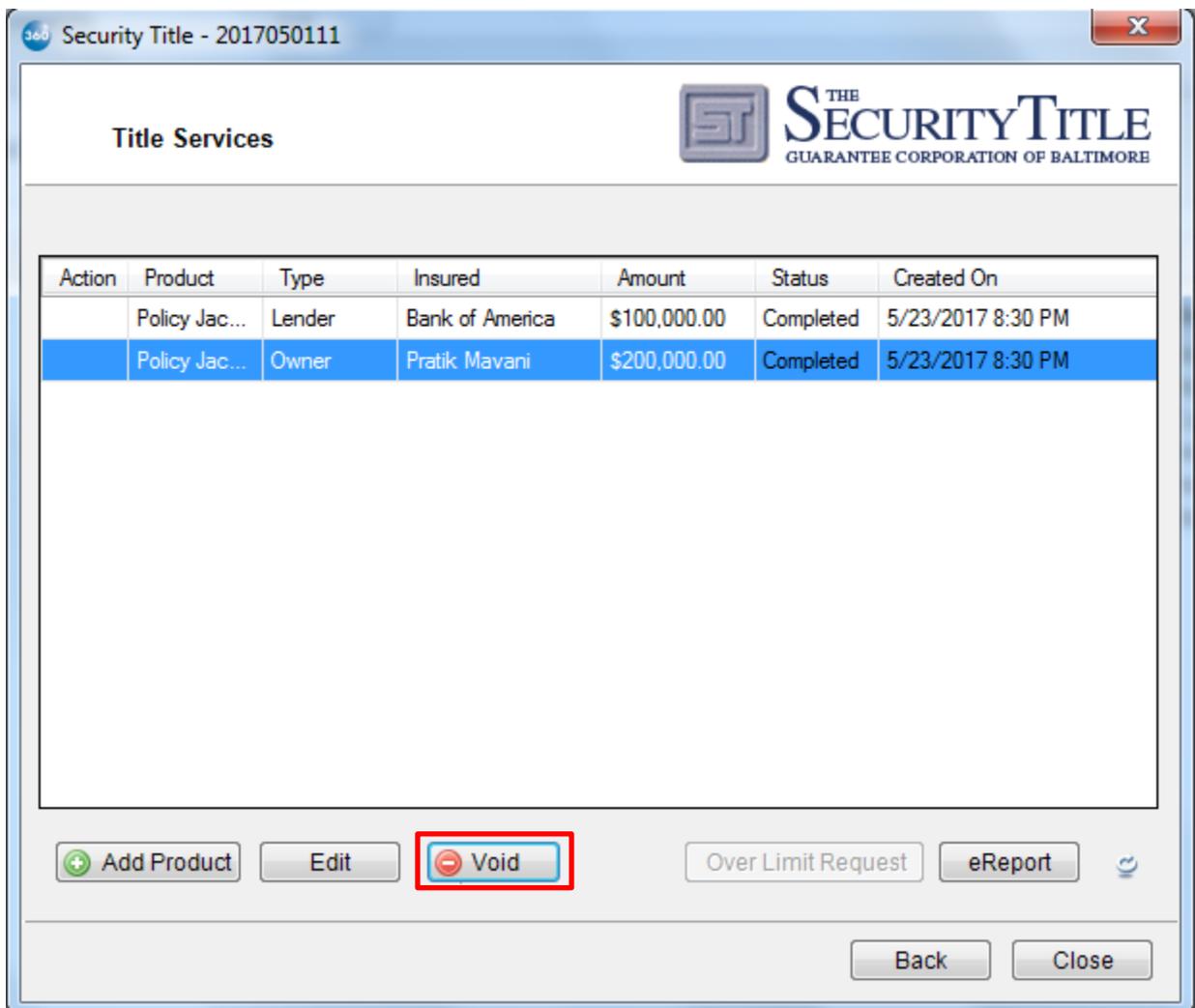
The 'Attachments' section is visible below, showing a list of files. The first row is highlighted with a red box:

| Name | Description | Type | Source | Size | Last Modified On | Last Modified By |
|-------------------------------------------|--------------------|----------------|----------|----------|-------------------|------------------|
| PolicyJacket_Owner_2017010003_2017022... | PolicyJacket_O... | Adobe Acrob... | Attached | 257 KB | 2/21/2017 4:01 PM | FIT2NET\mallikir |
| PolicyJacket_Owner_2017010003_20170221 | PolicyJacket_O... | Adobe Acrob... | Attached | 257 KB | 2/21/2017 3:51 PM | FIT2NET\mallikir |
| PolicyJacket_Other_2017010003_20170215 | PolicyJacket_Ot... | Adobe Acrob... | Attached | 151 KB | 2/15/2017 4:46 PM | FIT2NET\mallikir |
| PolicyJacket_Lender_2017010003_2017022... | PolicyJacket_L... | Adobe Acrob... | Attached | 513 KB | 2/21/2017 4:11 PM | FIT2NET\mallikir |
| PolicyJacket_Lender_2017010003_20170221 | PolicyJacket_L... | Adobe Acrob... | Attached | 520 KB | 2/21/2017 4:01 PM | FIT2NET\mallikir |
| PolicyJacket_Lender_2017010003_20170215 | PolicyJacket_L... | Adobe Acrob... | Attached | 513 KB | 2/15/2017 1:46 PM | FIT2NET\mallikir |
| FNTI_Jacket_2017010003_20170227 | FNTI_Jacket_2... | Adobe Acrob... | Attached | 736 KB | 2/27/2017 5:54 PM | FIT2NET\mallikir |
| FNTI_Jacket_2017010003_20170216 (1) | FNTI_Jacket_2... | Adobe Acrob... | Attached | 736 KB | 2/16/2017 7:53 PM | FIT2NET\mallikir |
| FNTI_Jacket_2017010003_20170216 | FNTI_Jacket_2... | Adobe Acrob... | Attached | 1,472 KB | 2/16/2017 7:43 PM | FIT2NET\mallikir |
| FNTI_CPL_2017010003_20170216 (1) | FNTI_CPL_201... | Adobe Acrob... | Attached | 39 KB | 2/16/2017 8:32 PM | FIT2NET\mallikir |
| FNTI_CPL_2017010003_20170216 | FNTI_CPL_201... | Adobe Acrob... | Attached | 39 KB | 2/16/2017 7:55 PM | FIT2NET\mallikir |
| CPL_Lender_2017010003_20170215 | CPL_Lender_20... | Adobe Acrob... | Attached | 55 KB | 2/15/2017 1:47 PM | FIT2NET\mallikir |
| CPL_347652_2017010003_20170228 | CPL_347652_2... | Adobe Acrob... | Attached | 520 KB | | |

Voiding a Policy Jacket

From the **Title Services** screen, you can void a Policy Jacket that you previously created from the Order.

- Highlight the Policy from the list that you want to void and click the **Void** button:

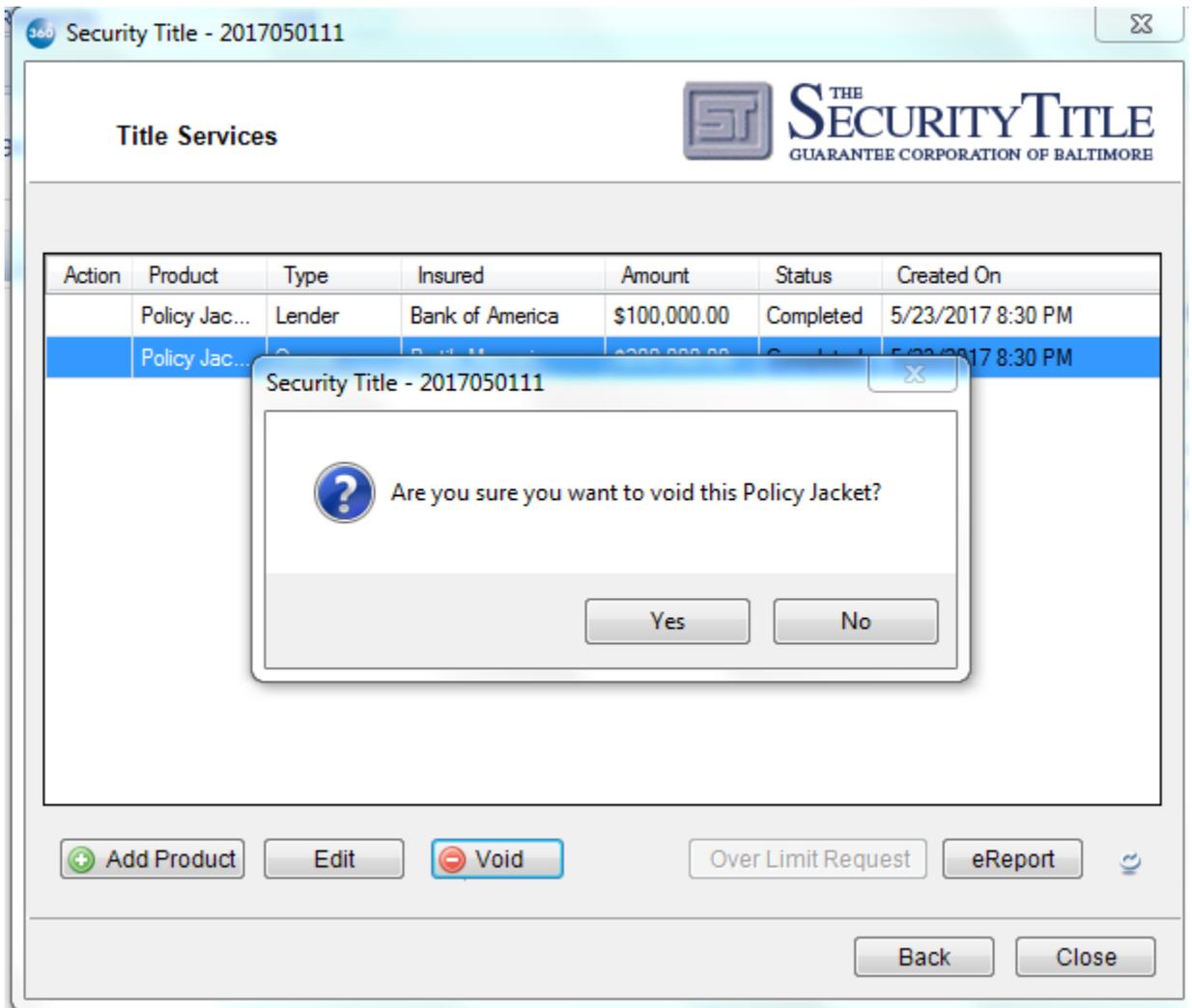


The screenshot shows a web application window titled "Security Title - 2017050111". The main content area is titled "Title Services" and features the logo for "THE SECURITY TITLE GUARANTEE CORPORATION OF BALTIMORE". Below the header is a table with the following data:

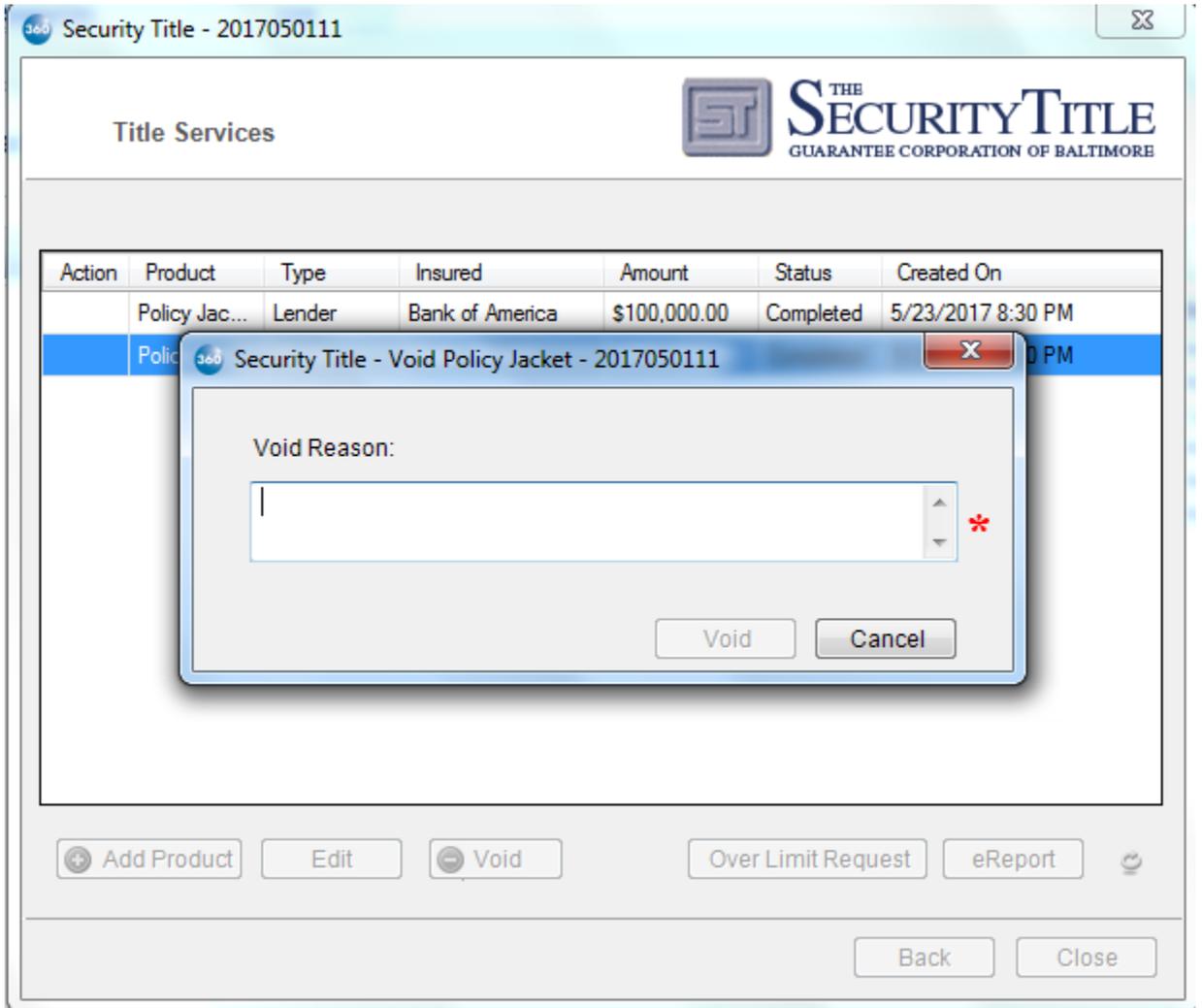
| Action | Product | Type | Insured | Amount | Status | Created On |
|--------|---------------|--------|-----------------|--------------|-----------|-------------------|
| | Policy Jac... | Lender | Bank of America | \$100,000.00 | Completed | 5/23/2017 8:30 PM |
| | Policy Jac... | Owner | Pratik Mavani | \$200,000.00 | Completed | 5/23/2017 8:30 PM |

Below the table, there are several buttons: "Add Product" (with a plus icon), "Edit", "Void" (with a minus icon and highlighted by a red box), "Over Limit Request", and "eReport" (with a refresh icon). At the bottom right, there are "Back" and "Close" buttons.

- A message will ask you to confirm this action:



- On clicking **Yes** button to void the Jacket, a new dialog box appears which requires user input for Void Reason. Provide the void reason and click Void to void the Jacket.



- The selected Jacket will now be voided and the status will change to **Voided** in the Title Services Screen.

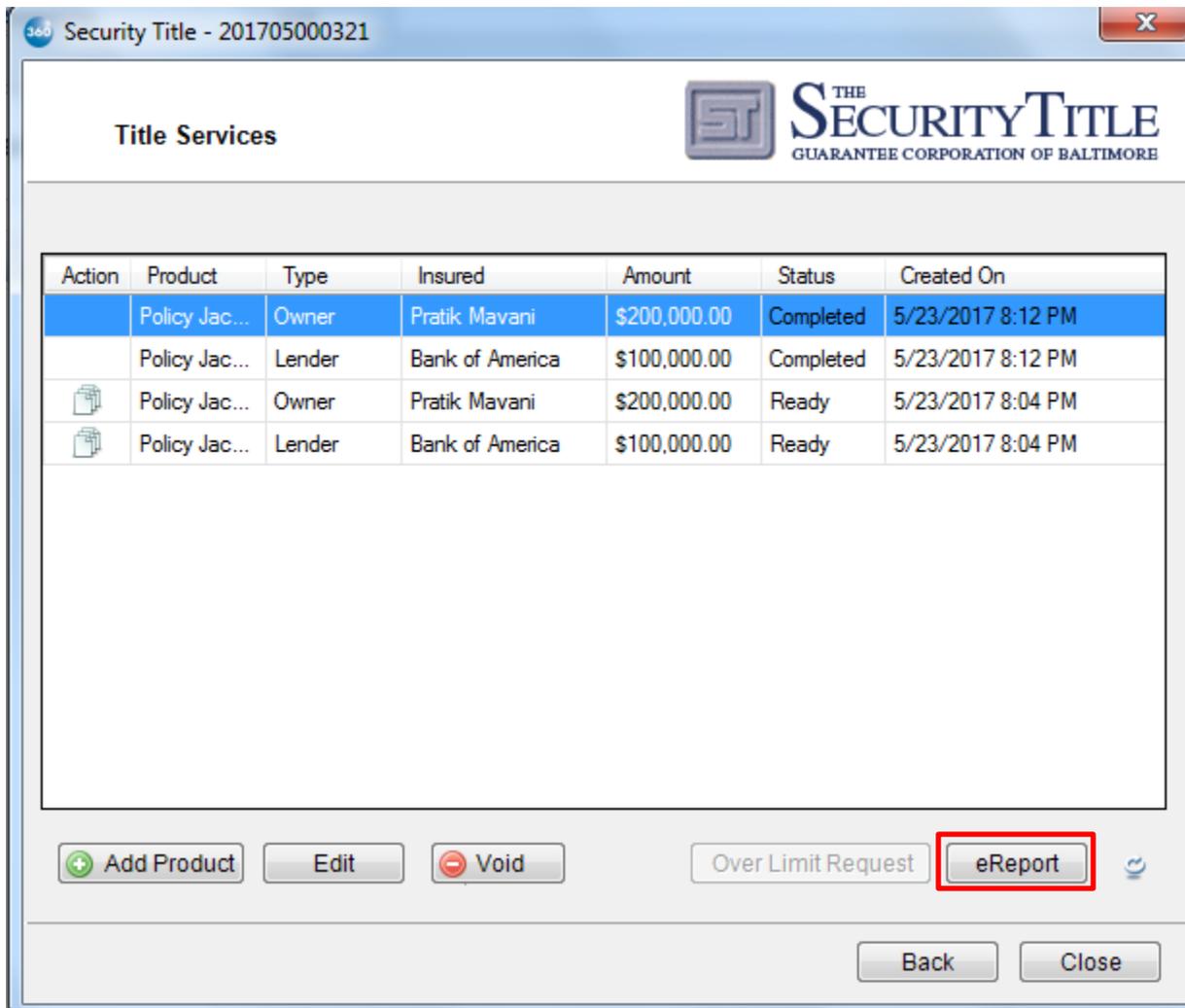
The screenshot shows a window titled "Security Title - 2017050111". The main header area contains the "Title Services" text and the logo for "THE SECURITY TITLE GUARANTEE CORPORATION OF BALTIMORE". Below this is a table with the following data:

| Action | Product | Type | Insured | Amount | Status | Created On |
|--------|---------------|--------|-----------------|--------------|-----------|-------------------|
| | Policy Jac... | Lender | Bank of America | \$100,000.00 | Completed | 5/23/2017 8:30 PM |
| | Policy Jac... | Owner | Pratik Mavani | \$200,000.00 | Voided | 5/23/2017 8:30 PM |

Below the table, there are several buttons: "Add Product" (with a plus icon), "Edit", "Void" (with a minus icon), "Over Limit Request", "eReport", "Back", and "Close". The "Voided" status in the table is highlighted with a red rectangular box.

eReport the file to eSC

The eReport button on the Title Services Screen will be enabled once a Policy Jacket is submitted.



Title Services

THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

| Action | Product | Type | Insured | Amount | Status | Created On |
|-----------------------------------------------------------------------------------|---------------|--------|-----------------|--------------|-----------|-------------------|
| | Policy Jac... | Owner | Pratik Mavani | \$200,000.00 | Completed | 5/23/2017 8:12 PM |
| | Policy Jac... | Lender | Bank of America | \$100,000.00 | Completed | 5/23/2017 8:12 PM |
|  | Policy Jac... | Owner | Pratik Mavani | \$200,000.00 | Ready | 5/23/2017 8:04 PM |
|  | Policy Jac... | Lender | Bank of America | \$100,000.00 | Ready | 5/23/2017 8:04 PM |

 Add Product Edit  Void Over Limit Request **eReport** 

Back Close

- Once the file is eReported successfully, a message is transmitted.

The screenshot displays the 'Security Title - 201705000321' application window. The main area is titled 'Title Services' and features the logo for 'THE SECURITY TITLE GUARANTEE CORPORATION OF BALTIMORE'. Below the header is a table with the following data:

| Action | Product | Type | Insured | Amount | Status | Created On |
|--------|---------------|-------|---------------|--------------|-----------|-------------------|
| | Policy Jac... | Owner | Pratik Mavani | \$200,000.00 | Completed | 5/23/2017 8:12 PM |
| | Policy Jac... | L... | | \$100,000.00 | C... | 5/23/2017 8:12 PM |
| | Policy Jac... | C... | | | | 2017 8:04 PM |
| | Policy Jac... | L... | | | | 2017 8:04 PM |

A modal dialog box titled 'SoftPro 360' is overlaid on the table. It contains an information icon and the text: '008 - File has been successfully eReported'. An 'OK' button is located at the bottom right of the dialog.

At the bottom of the application window, there are several buttons: '+ Add Product', 'Edit', '- Void', 'Over Limit Request', and 'eReport'. Below these is a text field containing 'eReportFileToeSC' and 'Back' and 'Close' buttons.

- After successful eReporting, no other CPL or Policy Jacket can be created, edited or voided.

Security Title - 201705000321

Title Services



THE SECURITY TITLE
GUARANTEE CORPORATION OF BALTIMORE

| Action | Product | Type | Insured | Amount | Status | Created On |
|--------|---------------|-------|---------------|--------------|-----------|-------------------|
| | Policy Jac... | Owner | Pratik Mavani | \$200,000.00 | Completed | 5/23/2017 8:12 PM |
| | P... | | | \$100,000.00 | Completed | 5/23/2017 8:12 PM |
| | P... | | | \$100,000.00 | Completed | 5/23/2017 8:12 PM |

SoftPro 360

 004 - File has been eReported to the Company - no Changes allowed

OK

Buttons: Add Product, Edit, Void, Over Limit Request, eReport, Back, Close